Manual Tripolis Dialogue
Version 3.2
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TRIPOLIS DIALOGUE

DIALOGUE SETUP
Introduction
Tripolis Dialogue Setup module are separated by

- **Contact section**
  Configure and edit Contact databases.

- **Content section**
  Workspaces, Article types, Newsletter types, Templates, Direct E-mail types, SMS message types, and Analyze Integration.

- **Publishing section**
  Soft- en Hard-bounce, Mail blacklist

- **Application section**
  User and FTP settings.

You are able to access these settings as follows.

1. From any page click **Setup**.
2. Select the required setting.

All users are able to access their own user preferences as described above.
### Process flow

#### Contact settings
- **Contact Database**

#### Content settings
- **Workspace**
- **SMS type**
- **Direct Email type**
- **Newsletter type**
- **Newsletter section**
- **Newsletter template**
- **Artikel type**
- **Artikel fields**

#### Publishing settings
- **Mail**
- **Blacklist on client level**

#### Application Settings
- **Create / Edit Users**
- **FTP Accounts**

#### User Settings
- **Password & language**
**USER SETTINGS**

**Language, Name and Email address settings**

Via user preferences you are able to change or edit your username (email) name, password and language.

Fields marked with a * are required fields.

The password should at least contain one digit, one lowercase character and one uppercase character. The password and password confirmation require at least 7 characters.

**Steps**
1. Click Settings | user preferences | profile.
2. Edit the required settings.
3. Click Save.

**Change Password**

The password should at least contain one digit, one lowercase character and one uppercase character. The password and password confirmation require at least 7 characters.

**Steps**
1. Click Setup | User preferences | profile.
2. Enter your old password.
3. Enter your new password.
4. Confirm your new password.
5. Click Save.

Administrators are able to reset all passwords via Setup | Application | Users.
APPLICATION SETTINGS

New User / User Settings

Administrators are able to add users and edit settings for all users.

**Steps**
1. Click **Setup**.
2. Select **Application**
3. Click on **Users** in the tree structure on the left
4. Click **New** to add a new user
5. Enter a **first and last name** and an infix if required.
6. Enter the users email address in the **username** field.
7. Enter a **password** and **confirm** the password.
   The password should at least contain one digit,
   one lowercase character and one uppercase character. The password and password confirmation require at least 7 characters.
8. Set the **Permissions** for the new user.
9. **Clientdomain Administrator**, equal to all rights.
10. **Clientdomain Advanced User**, equal to Administrator, except adding and creating users.
11. **Clientdomain User**, equal to end-user rights.
12. **Modules** Select the modules for this user to work with.
13. **Use the CTRL key to select multiple modules**.
14. **Submodules** select All submodules or the required submodules.
15. E.g. Content, Direct Mail and Content SMS, but no Content Newsletter.
16. Databases select All Databases or one or more Databases.
17. Workspaces select All Workspaces or one or more Workspaces.
18. Enabled determines if a user is active or not.

If this setting is not ticked a user can't login.
There are several methods to import or export contacts.

- Manually.
- Via an import/export file, batch wise.
- Via SOAP/API, landing pages.
- Batch wise via import, automated via API.
- Batch wise via Campaign manager.

An FTP account is required to import contacts via the campaign manager.

As administrator you are able to configure FTP / SFTP accounts, after which any user can select for import/export purposes.

**New FTP Account**

**Steps**
1. Click Setup.
2. Select Application.
3. Click FTP Accounts - New.
   - Enter the following details
     - Label
     - Host
     - Protocol
     - Username
     - Password
     - Remote Folder
     - Passive Modus (Y/N)
4. Click Save

**Test connection, Edit or Delete FTP/SFTP Account**

**Steps**
5. Click Settings.
6. Select via the dropdown menu Application.
7. Click FTP Account.
8. Select the FTP/SFTP Account.

You are now able to edit, delete or test the FTP connection.
TRIPOLIS DIALOGUE

CONTACT SETTINGS
Process Flow

**Contact Settings**
- New Contact Database
- Start Wizard
- Add Key field(s)
- Select field types
- Save & close

**Contact Settings**
- Configure contact database
- Add field groups
- New fields in group
- Create field types
- Save & close

**Import Contacts**
- Contact Database
- Import Contacts
- Dialogue Import function
- Via API function

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The Database
The Database is a collection of variable fields where all contact data is stored. This data is for use throughout the application and is managed in the contact module. Customer environments can have multiple contact databases for example due to separation of brands or separation of customers.

New Database
Creating a new database starts with the database wizard. You need to create a key field. After creation either click save and close or add another field.

Steps
1. Click Setup.
2. Select Contacts
3. Click Contact databases
4. Click New.
   The Database Wizard starts.
5. Enter a label.
   A Label is displayed to a user.
6. Enter a Name.
   A name is used for internal database purposes.
   Only digits, alphanumeric and "_" are allowed for this field.
7. Click Next.
8. Select an AcceptEmail account if it's relevant. Or just click next.
9. Define the Key field.
   A key field is used to identify a record as an unique record.
   For example, the use of an E-mail address as a key field. When adding a new contact, this field will be used to check if the field value already exists in the database.
   - If the key field value already exists you need to change the field value, or choose the option to edit the duplicate entry.
   - If the key value does not exists, the contact will be added.
10. Enter a Label for the key field.
11. Enter a Name.
Depending on the field type, data entries are validated.

**Field types**
Depending on the field type, data entries are validated.

Field type overview:

- **String**: For text entries, e.g. first name, company name etc.
- **Int. (Integer)**: For numeric entries without decimals.
- **Decimal**: For numeric entries, including decimals.
- **Date**: For date entries e.g. birthdays.
- **Date time**: For date and time entries, e.g. subscriber date and time.
- **Email**: For Email entries.
- **Mobile**: For mobile phone entries.
- **Pick list**: For multiple entries to choose from. (Interest = A,B,C or D)
- **Boolean**: For True or False entries.

12. **Order** Sets the order of created fields within a field group.
13. **Min. Length / Max. Length**: Sets the minimum / maximum characters of the entry field.
14. **Default value**: Option to enter a fixed value as a default value.

15. **Kind of field**: Sets the display of a field in a contact tab.
- **General.** Displays the field in the overview tab
- **Summary.** Displays the field in the contact tab.
- **Interest.** Displays the field in the interest tab.

16. Click **Next**.
17. Click **Finish** to save and close the wizard or click **Cancel**.

However it is possible to add new fields with the use of the Wizard, it is advised to configure the database via contact settings.

The created database is displayed on the left side of the screen and in the list with contact databases.

You are able to continue configuring the database. Just click on it.

If you want to configure or edit the database on a later stage, click on the module **Setup** select **Contact** and click on the required database to start editing.
# Edit Contact Database

The Contact Database starts with 1 field group. When you select another Kind of Field than “General”, the selected kind of field will be displayed in the contact module.

Field groups only appear, if selected by creating a field. Standard is this the General field group. The key field(s) are always shown on top in the contact module.

Whenever required you are able to create more new field groups. This can help you to make your contact data more insightful.

## New Field Group
You are able to conveniently group details. e.g. a field group called `other` for customer number, date added, date of birth etc.

### Steps
1. Click on Setup.
2. Click on the required Database.
3. Click on Field Groups.
4. Click on New.
5. Enter a Label.
6. Order sets the order of created field group.
7. Click save.

![Edit Contact Database](image)
You’ll find the new Field Group in a list by Field Groups.

<table>
<thead>
<tr>
<th>Label:</th>
<th>CustomerID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>customers</td>
</tr>
<tr>
<td>Presentation field:</td>
<td>Email</td>
</tr>
</tbody>
</table>

These field groups only appear in the contact module, when there are connected fields.

When creating a field, you can select the required Field Group. It is also possible to change the Field Group of a Field afterwards.

**New Field Steps**

1. Click on *Setup*.
2. Click on the **Database**, where you want to create a new Field.
3. Click **Create field**.
4. Enter a **Label**. A Label is displayed on the screen
5. Enter a **Name**. A name is used in the database. Only digits, alphanumeric and “-” are allowed for this field.
6. Select depending on the entry type a **field type**.
7. Tick the **Key** option if you want to use more key fields. The First key field is created in the database wizard.
8. Select **Required** if the field is a required entry field.

9. **In Overview.** Tick this option if you want to see this field in the contacts overview mode.

   When ticked this field can also be used for search purposes in contact overview.

10. Select the **Field Group**.

11. **Order** sets the order of created fields within a field group.

12. Select the **Kind of Field**

13. Click **Save**

Created fields are listed in the different **field groups**. Each Field Group has its own list. To edit or delete fields, simply click on the particular field or select the checkbox and click **Edit**.

**Edit Field Groups**

**Steps**

1. Click on **Setup**.
2. Click on the **Database**, where you want to edit a field group.
3. Click on **Field Groups**.
4. Select the **Field Group**
5. Click on **Edit**.
   You can only edit the Field Group Label and change the order.

**Delete Field Groups**

**Steps**

6. Click on **Setup**.
7. Click on the **Database**, where you want to delete a field group.
8. Click on **Field Groups**.
9. Select the **Field Group**.
10. Click on **Delete**.
   The Fields that where connected to that particular Field Group will move to the default Field Group.

**Delete the Database**

It is possible to delete the whole database. When you delete the database, you also delete all contacts in the database.

It is only possible to delete the database, when there isn’t a connected workspace. If there is a workspace connected to the database you have to delete the workspace first.
Steps
1. Click on Setup
2. Click on the Database you want to Delete
3. Click on Delete Database
4. Tick the checkbox
5. Click Delete.
Example Field Groups

1. This is the default Field Group.
2. This is a created Field Group. It is possible to change the order with.
   In this example I also created two field of the type

3. Summary and a field of the type
4. Interest. They appears as field groups in the profile of a contact

This is the key field of the Database. When you have more than one key fields, they will displayed in this area.
TRIPOLIS DIALOGUE

CONTENT SETTINGS
Process Flow

<table>
<thead>
<tr>
<th>Content</th>
<th>Instellingen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workspace</td>
<td>SMS type</td>
</tr>
</tbody>
</table>

Article type → Article fields
**New Workspace**

A workspace is a virtual work environment for your content and Media repository.

Content can be divided in

- SMS
- Direct mails
- Newsletters.

- The Library is a collection of articles and images.

A workspace is attached to one database.
All fields used in this workspace belong to that particular database.
A database however can have multiple workspaces.

**Steps**

1. Click on the module **Setup**.
2. Select **Content**.
3. Click **Workspaces** on the left.
4. Click **New**
5. Enter a **label**.  
   A label is displayed on the screen for users.
6. Enter a **Name**.  
   A name is used in the database. Only digits, alphanumeric and "_" are allowed for this field.
7. Select the required **Contact database**.
8. **Public Domain name and Bounce Domain name**
   Mailings are (per default) sent with the use of the Tripolis (sub)domains. URL’s and images in e-mail, click- en open counters and bounce-address direct all to public.tripolis.com and mail.tripolis.com.
   
   Organisations who want to use their own domain names for mailings require to enter their **Public Domain name** and **Bounce Domain name** in these fields.

9. **Click Save.**

You’ll find the new workspace on the left side of the screen in a tree structure and in the list with workspaces.
The following chapters relate to newsletter templates
Article type
Article fields
Newsletter type
New Section in Newsletter type
Newsletter Template
Newsletter Article Template

**New Article type**
You need to create an article type which will be used for creating Newsletters. For example article types header, text and footer.

Within an article type you need to create article fields. See next chapter.

**Steps**
1. Click on the **Setup** module.
2. Select **Content**.
3. Open the **Workspace** in the tree structure.
4. Click **Article Type**.
5. Click **New**

   ![New Article type setup](image)

6. Enter a **label**.
   A label is displayed on the screen.

7. Enter a **Name**.
   A name is used in the database.
   Only digits, alphanumeric and "_" are allowed for this field.

8. Click **Save**.
The **article type** is stored in the selected workspace.
After creating the new article type you are able to add article fields by pressing **New fields**.

**Save**  |  **New field**
---|---

**Edit article type 'text'**

<table>
<thead>
<tr>
<th>Label</th>
<th>text</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>text</td>
</tr>
</tbody>
</table>

**Article fields**
Within an article type you need to create article fields.
For example article type “main article” has amongst an article image, article links and an article text field.
Here you also need to define the field type, e.g. article field text with field type *rich text*.

After creating the new article type, you need to create article fields for this type.

You are also able to edit the article type or add article fields on a later stage.

**Steps**
1. Click on the **Setup** module.
2. Select **Content**.
3. Open the **Workspace** in the tree structure.
4. Click **Article Type**.
5. Select the **Article type**
6. Click on **New field**
7. Enter a **label**.
8. Enter a **name**.
9. It is possible to specify a **Default value**.
10. Tick **required** if this is a required article field.
11. Select the Field type.
   - Text field
   - Text area
   - Rich Text field Area
   - URL
   - Image
   - Color

12. Select the order of the new article field.
13. Click Save.

Repeat the steps click New field to create the required article fields.

Article fields are stored in the Article type in the selected workspace.

---

**Newsletter type**

You also need to create a newsletter type for your newsletter.
It is possible to create multiple newsletters types. E.g. with different types you can send newsletters on behalf of different senders.

You need to create at least one newsletter type.

**Steps**

1. Click on the Setup module.
2. Select Content.
3. Open the Workspace in the tree structure.
4. Click **Newsletter type**.
5. Click **New**
6. Enter a **Label**
   A label is displayed on the screen.
7. Enter a **Name**
   A name is used in the database.
   Only digits, alphanumeric and “_” are allowed for this field.
8. Enter a **From name**.
9. Enter a **From address**.
10. **To Field**. This is default e-mail.
11. **Reply to address**. If you leave this field blank the from address will be used as the reply address.
12. If required enter a **Default subject** for the newsletter.
13. If required change the **Character Set Encoding**.
14. Click **save**.

<table>
<thead>
<tr>
<th>Create newsletter type</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Label</strong>:</td>
</tr>
<tr>
<td><strong>Name</strong>:</td>
</tr>
<tr>
<td><strong>From name</strong>:</td>
</tr>
<tr>
<td><strong>From address</strong>:</td>
</tr>
<tr>
<td><strong>To Field</strong>:</td>
</tr>
<tr>
<td><strong>Reply-to address</strong>:</td>
</tr>
<tr>
<td><strong>Default subject</strong>:</td>
</tr>
<tr>
<td><strong>Character Set Encoding</strong>:</td>
</tr>
</tbody>
</table>

The newsletter type is stored in the selected workspace
After creating a newsletter type you need to create newsletter sections.

**New Section in Newsletter type**

You also need to set-up newsletter sections for your newsletter. Items which should be editable per newsletter edition should be stored in sections. For example, separate sections for news articles, advertisements, left and right column etc. The position of an item in a newsletter will be determined by its section. Fixed newsletter items don’t need a newsletter sections.

**Steps**

1. Click on the Setup module.
2. Select Content.
3. Open the Workspace in the tree structure.
4. Click Newsletter type.
5. Open the Newsletter type where the sections must be created.
6. Click on Sections
7. Click on New
8. Enter a Label
9. Enter a Name
10. Select a default article type (optional)
11. Click on Save

It is possible to provide a section with
RSS and/or ATOM feeds. See the technical manual for details of this possibility.

Click **New section** if you would like to add another section and repeat the steps as described above.

After creating a newsletter type you also need to create templates for your newsletter

**Newsletter Template**

You also require to create a two templates for your newsletter. A HTML template and a text template.

**Steps**

1. Click on the **Setup** module.
2. Select **Content**.
3. Open the **Workspace** in the tree structure.
4. Click **Newsletter type**.
5. Open the **Newsletter**
6. Click **Newsletter Templates**
7. Select by **Display HTML**
8. Enter a **Label**.
9. Enter a description (optional)
10. Copy the HTML code from te HTML editor and paste it into the **Source** Field.
    
    HTML Templates are usually build in HTML editors such as Dreamweaver.
11. Click **Save**.
To create a text version you have to repeat the steps as above and select output format **text**. Add the required text into the source field and click **Save**.

After you created a newsletter template you need to create a newsletter article template.
Newsletter Article Template

After saving a newsletter template, the template appear in the tree structure on the left.

Steps
1. Click on the Setup module.
2. Select Content.
3. Open the Workspace in the tree structure.
4. Click Newsletter type.
5. Open the Newsletter templates
6. Unfold the required Newsletter Template
7. Click on New.
8. Enter a label.
9. Select the right Article type.
10. The Display is already selected.
11. Enter a Description (optional).
12. Copy the HTML code from the HTML editor and paste it into the Source Field.

HTML Templates are usually build in HTML editors such as Dreamweaver.
13. Click on Save.

Repeat the above moves for each article type you want to use. Each article template can be edit afterwards. Just select the required article template and click on edit.
You are now able to create your newsletter in the Content module.
Copy newsletter
You can easily copy a newsletter.

Steps
1. Click on the Setup module.
2. Click on Content.
3. Open the Workspace in the tree structure.
4. Click on the required Newsletter type.
5. Click on Copy

6. Enter a label and Name.
7. Click Save.
**New Direct email type**

In order to send Direct emails you first need to create a Direct Email type. You need to create at least one Direct Email type.

**Steps**

1. Click on the **Setup** module.
2. Click on **Content**.
3. Open the **Workspace** in the tree structure.
4. Click **Direct email Type**.
5. Enter a **label**.
6. Enter a **Name**.
7. Enter a **From address**.
8. Enter a **From name**. This is the name receivers get to see.
9. Enter a **Reply-to Address**. If you leave this field blank, the From address will be used as the Reply-to address.
10. **External HTML URL:** Add an URL if required. 

**External URL’s.** When you enter an URL in External HTML URL the content of the URL will by default uploaded when creating a direct email.

This option is, including locally stored URL’s also possible in the content module, creating a direct mail. Uploading HTML Content is only possible for Direct Mails.

11. **External Text URL:** Add a Text URL if required.

12. **Enable WYSIWYG editor:** Tick this option in order to use the WYSIWYG editor in the content module.

13. Select an email field with.

14. If required change **Character Set Encoding.**

15. Click **Save.**

The Direct Email Type is stored in the selected workspace.

---

**Personalize Reply-to address**

The Reply-to address can also be personalized. Be sure a personalized Reply-to address has an legit email syntax. If you always use the same personalized Reply-to address, it’s pratical to enter it in the Setup module when creating/editing a direct email type. If the personalized Reply-to address varies, it’s possibly to enter it in the Content module when you create a Direct email.

Reply-to address in the Setup module.
Reply-to Address when creating a Direct email in the Content module

<table>
<thead>
<tr>
<th>Tripolis Academy</th>
<th>Properties for direct email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Email details</td>
</tr>
<tr>
<td></td>
<td>Label:</td>
</tr>
<tr>
<td></td>
<td>Name:</td>
</tr>
<tr>
<td></td>
<td>Subject:</td>
</tr>
<tr>
<td></td>
<td>Description:</td>
</tr>
<tr>
<td></td>
<td>Direct email type:</td>
</tr>
<tr>
<td></td>
<td>Subscriber notification</td>
</tr>
<tr>
<td></td>
<td>Header details</td>
</tr>
<tr>
<td></td>
<td>From name:</td>
</tr>
<tr>
<td></td>
<td>From address:</td>
</tr>
<tr>
<td></td>
<td>Reply to address:</td>
</tr>
<tr>
<td></td>
<td>[$icon contact email$]</td>
</tr>
</tbody>
</table>

**New SMS type**

In order to send a SMS you first need to create a SMS type. Different SMS types can be useful to differentiate e.g. business and private mobile phone numbers, or when you would like to send SMS messages on behalf of different senders.

You need to create at least one SMS type.

**Steps**

1. Click on the Setup module.
2. Click on Content.
3. Open the Workspace in the tree structure.
4. Click on SMS message type.
5. Click on New.
6. Enter a label.
7. Enter a Name.
8. Enter the default originators name.
   This is the name receivers of the SMS will get to see.
9. Select a mobile phone field.
10. Click Save.

The SMS type is stored in the selected workspace.
TRIPOLIS DIALOGUE

PUBLISHING SETTINGS
Bounce & Blacklist settings
Bounced e-mail addresses will be stored on a blacklist. There are 2 types of blacklists. A Mail blacklist and a blacklist on client level. E-mail addresses on both blacklists are excluded for mailings. These addresses get the status 'not send'.

- **Mail blacklist**
  You’ll find the mail blacklist in the Contact module. Per contact database there is a mail blacklist.

- **Blacklist on client level**
  You’ll find the Blacklist on client level in the Setup module by publishing. The Client level Blacklist list all the e-mail addresses of all databases when you copy the e-mail addresses from the mail blacklist. It is also possible to store all hard bounces in the client level Blacklist.

**Blacklist settings**

**Steps**
1. Click on the **Setup** module.
2. Select **Publishing**.
3. Select **Mail**.
4. Select **Properties**.
5. Click **Save**.

**Soft bounce threshold**
A Soft bounce can be classified as a hard bounce by the threshold. Depending on the selected number of sending attempts, a soft bounce e-mail address will be classified as invalid and placed on the blacklist.

**Blacklist: Store hard bounces to email blacklist on client level**
Select this option if e-mail addresses on the mail blacklist should be stored on the blacklist on client level.
**Blacklist**
A blacklist lists all hard-bounced e-mail addresses.

Only e-mail address are listed on a blacklist **not** a contact itself. If the mobile number of the contact on a blacklist is known you are still able to send this contact a SMS message.

**Steps**
1. Click on the **Setup** module.
2. Select **Publishing**.
3. Select **Mail**.
4. Click on **Blacklist**

You have the following options.

- Click **New** to put an e-mail address manually on the blacklist. Enter the e-mail address which should be placed on the blacklist. Add a comment if required.
- Select an e-mail address and click **Delete** to remove an address from the blacklist.
- Click **Export** to export e-mail addresses from the black list.
**Content Contact Module**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONTACT MODULE</td>
<td>43</td>
</tr>
<tr>
<td>PROCESS FLOW</td>
<td>45</td>
</tr>
<tr>
<td>CONTACT MODULE</td>
<td>46</td>
</tr>
<tr>
<td>CONTACTS</td>
<td>47</td>
</tr>
<tr>
<td>VIEW A CONTACT</td>
<td>49</td>
</tr>
<tr>
<td>EDIT CONTACT</td>
<td>49</td>
</tr>
<tr>
<td>NEW CONTACT</td>
<td>50</td>
</tr>
<tr>
<td>IMPORT CONTACTS</td>
<td>50</td>
</tr>
<tr>
<td>VIEW IMPORT REPORT</td>
<td>54</td>
</tr>
<tr>
<td>EXPORT CONTACTS</td>
<td>55</td>
</tr>
<tr>
<td>GROUPS</td>
<td>56</td>
</tr>
<tr>
<td>NEW GROUP</td>
<td>57</td>
</tr>
<tr>
<td>GROUP DISPLAY</td>
<td>57</td>
</tr>
<tr>
<td>MAIL BLACKLIST</td>
<td>66</td>
</tr>
<tr>
<td>QUERY</td>
<td>66</td>
</tr>
<tr>
<td>SMART GROUP</td>
<td>68</td>
</tr>
<tr>
<td>DELETE MULTIPLE CONTACT GROUPS AT ONCE</td>
<td>68</td>
</tr>
<tr>
<td>MAIL BLACKLIST</td>
<td>69</td>
</tr>
</tbody>
</table>
Process flow

Contact Instellingen
- Nieuwe Contact Database
- Wizard Starten
- Sleutel aannemen
- Veld type bepalen
- Opslaan & afsluiten

Contact Instellingen
- Contact Database inrichten
- Veldgroepen Aanmaken
- Nieuwe velden in veldgroep
- Veld type bepalen
- Opslaan & afsluiten

Contacten Importeren
- Contact Database
- Contacten Importeren
- Dialogue Import functie
- Via de API functie

Contact Module
- Contact Database
- Import Export Contacten
- Doelgroep via Queries
- Statische groep
- Segment
- Smart groep
- Test groep
- Groepen samenvoegen, (multi)spitsen, uitsluiten

Content Module
- SMS of Mail sposten

Publishing Module
- SMS of Mail versturen

Rapportage Module
- Statistieken
Contact Module

In the Contact module, you can manage all your contacts, groups, imports, exports and related information.

Contacts Dashboard

The contact dashboard is the first screen you’ll see, when you open the Contact module. The dashboard provides a quick search on any selected profile field, displays information about today’s import and exports and shows the subscription events for your subscription groups in a bar chart.

Search contacts

You can search on any profile field in the contact database by selecting the profile field you which to search on, provide the search term and click on the magnifying glass or press 'Enter'.

Today's imports & exports

The imports and exports that took place today are listed here. When you click on an item under Imports or Exports you are redirected to the details page for this event.

Subscription statistics

For the subscription groups a bar chart is displaying the amount of contacts per month, for the last twelve months. By moving your mouse over one of the bars in the chart the exact number of contacts is shown.

Note: The number of contacts is calculated over night.
Contacts

Tripolis Contact Management provides the ability to manage all your contacts. Some key features

- Direct searchable overview of all your groups, subscriptions and contacts
- Detailed individual contact information, with interests, communication history and subscription events
- Unlimited custom fields for geographical or behavioral segmentation
- Extensive group manipulation like merge, exclude or (multi)split

The Contacts segments start in a list view. All contacts in the database will be displayed.

The total number of contacts is displayed above the list of contacts. “Results 1 – 15 of 4,802”.

The total amount of contacts displayed on screen can be set to 15, 50 or 100.

List view enables you to easily search for a contact.

1. Option 1: Search Contacts. Enter a value in the Search Contacts box. This search option is based on ‘full text search’ and for all database fields.
2. Option 2: Enter a value in one of the filter fields and press enter. The search relates only to that particular database field.

When entering multiple filter values the search will be based by AND statements.

To view the whole list of contacts empty the filter fields and press enter.

View: You can view contacts on individual level by clicking on the contact or tick the box and click on View.

Edit: To edit a contact, tick the checkbox on a contact and click Edit.

Delete: To delete a contact, tick the checkbox of the contact and click Delete. The contact will be removed from the database and all the groups where.

If you want to delete a contact from a group, click Edit, select the Subscriptions and remove the tick from the required group and Save.

It is also possible to remove a contact from the group perspective. Click in the tree structure on the left the required group. Click on Contacts. Tick the checkbox of the contact you want to remove from the group and click on Remove from Group.
**View a Contact**

In the Contacts segment you are able to view contacts in a list view or you can view contacts on individual level.

By clicking on a contact, the details of the contact will appear. Contact details are organized in Profile, Subscriptions and Communication history.

**Profile:** The values of the contact database will be displayed.

**Subscriptions:** Displays on which date, which time and by which source a contact (un)subscribed.

**Communication history:** Displays all e-mails and SMS messages a contact has received.

---

**Edit Contact**

You can edit contacts on individual level by clicking on the contact and click on Edit. Or you can tick the checkbox from the list and click **Edit** to edit the contact details.

If you want to delete a contact from a group, click **Edit**, select the **group membership** and remove the tick from the required group.
New Contact

1. Click New to add a single new contact to the database.
2. Enter the contact details. Entry fields marked with a * are required fields.
3. After creating a contact, you can assign the contact to groups by editing the contact. If you create a contact from a group, the contact will automatic be assigned to that group.
4. Click Save when finished.

Import contacts

You are able to add all of your contacts in Dialogue. Manually, but also through an import functionality.

It is not recommended to edit a CSV file in Excel, preferred use ‘OpenOffice’ or a database application as MSAccess (Excel looks at settings from Windows locale country settings. These settings might differ from the notation settings in Dialogue)

Before you start

- Make sure the import file has headings for each column.
- Make sure required database fields are in the import file.
- Make sure there are no blank fields in the import file which are required fields in the database.
- To be imported fields need to have the same field type as in the database. (e.g. you can’t import a text field to a date field in Dialogue)
Steps
1. Check if the import file is valid. (see: before you start)
2. Click **Import** and **New**
   The Import Wizard opens in a pop up.

3. Select the **Import Mode**

   Import Mode options:
   - **Add or update contacts to a Group.**
     New contacts from the import file will be added to a group and existing contacts from the import file will be updated.
   - **Add or update contacts to a group and synchronize**
     New contacts from the import file will be added to a group and existing contacts from the import file will be updated. Contacts in a Group, but not in an import file will be deleted from the group.
   - **Exclude contacts from a group**
     Contacts from an import file will be removed from a group.
   - **Add new contact to a group.** Contacts in the import file who are not in a group will be added to a group. Existing contacts will not be imported or updates
   - **Add or update contacts to the database**
     New contacts from the import file will be added to the database and existing contacts from the import file will be updated.
   - **Add contacts to the database**
     new contacts from the import file will be added to the database and existing records will be ignored.
   - **Update contacts in a database** Contacts in the database will be updated, contacts who are not in the database, but in the import file will not be imported or updated.
4. If required select the **group for import purposes, or create a new group.**
5. Click **Next**.
6. Click **Browse** to attach the import file.

![Upload import file]

- **File to upload:** C:\Documents and Settings\Bladeren...
- [ ] I confirm that the import file is in line with the [anti-spam regulations](#) of Tripolis Solutions.

7. Tick the checkbox to confirm that the import file is in line with our anti-spam regulations.

8. Click **Upload File**

9. When **Done Uploading** click next.

10. **Match** the headers from the import file with the database values.

![Match the fields in the import file with the fields in the contact database]

- **Make sure required Contact fields in Dialogue are also in the import file.**

11. Click **Import** to start the import.

![Import wizard finished]

The import is in progress. You will receive an email when the import is completed. Click the close button to view the import report while the import progresses.

12. Click **Close** to view the import report.

13. On the left of the screen you'll find import reports.

14. Click on the required import report to view import statistics.

   You also will receive a detailed import report by mail as soon as the import is finished.
Example of import file with errors

<table>
<thead>
<tr>
<th>email</th>
<th>first name</th>
<th>last name</th>
<th>places</th>
<th>Company</th>
<th>Date added</th>
<th>error during import</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:george.adams@tripolis.com">george.adams@tripolis.com</a></td>
<td>Adams</td>
<td>George</td>
<td>Amsterdam</td>
<td>Microsoft</td>
<td>2008-12-06</td>
<td>error during import</td>
</tr>
<tr>
<td><a href="mailto:grover.adams@tripolis.com">grover.adams@tripolis.com</a></td>
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<td>Grover</td>
<td>Amsterdam</td>
<td>Google</td>
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<td></td>
</tr>
<tr>
<td><a href="mailto:aidan.eisenhower@tripolis.com">aidan.eisenhower@tripolis.com</a></td>
<td>Aidan</td>
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<td>Amsterdam</td>
<td>Google</td>
<td>2008-12-06</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:alejandro.eisenhower@tripolis.com">alejandro.eisenhower@tripolis.com</a></td>
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<td>Google</td>
<td>2008-12-06</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:anthony.eisenhower@tripolis.com">anthony.eisenhower@tripolis.com</a></td>
<td>Anthony</td>
<td>Eisenhower</td>
<td>Amsterdam</td>
<td>Oracle</td>
<td>2008-12-06</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:austin.eisenhower@tripolis.com">austin.eisenhower@tripolis.com</a></td>
<td>Austin</td>
<td>Eisenhower</td>
<td>Amsterdam</td>
<td>Google</td>
<td>2008-12-06</td>
<td></td>
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<tr>
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<td>Yahoo</td>
<td>2008-12-06</td>
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</tr>
<tr>
<td><a href="mailto:brandon.eisenhower@tripolis.com">brandon.eisenhower@tripolis.com</a></td>
<td>Brandon</td>
<td>Eisenhower</td>
<td>Amsterdam</td>
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<tr>
<td><a href="mailto:brian.eisenhower@tripolis.com">brian.eisenhower@tripolis.com</a></td>
<td>Brian</td>
<td>Eisenhower</td>
<td>Amsterdam</td>
<td>Intel</td>
<td>2008-12-06</td>
<td></td>
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<tr>
<td><a href="mailto:Caleb.eisenhower@tripolis.com">Caleb.eisenhower@tripolis.com</a></td>
<td>Caleb</td>
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</tr>
<tr>
<td><a href="mailto:colin.eisenhower@tripolis.com">colin.eisenhower@tripolis.com</a></td>
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<td>Eisenhower</td>
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<tr>
<td><a href="mailto:corder.eisenhower@tripolis.com">corder.eisenhower@tripolis.com</a></td>
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<tr>
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<tr>
<td><a href="mailto:cola.eisenhower@tripolis.com">cola.eisenhower@tripolis.com</a></td>
<td>Cole</td>
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<tr>
<td><a href="mailto:connor.eisenhower@tripolis.com">connor.eisenhower@tripolis.com</a></td>
<td>Connor</td>
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<td>2008-12-06</td>
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<tr>
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<td>David</td>
<td>Eisenhower</td>
<td>Amsterdam</td>
<td>Tripolis</td>
<td>2008-12-06</td>
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</tr>
<tr>
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<tr>
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<tr>
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<td>Eisenhower</td>
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<td>Microsoft</td>
<td>2008-12-06</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:dwayne.eisenhower@tripolis.com">dwayne.eisenhower@tripolis.com</a></td>
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<td>Eisenhower</td>
<td>Amsterdam</td>
<td>Dell</td>
<td>2008-12-06</td>
<td></td>
</tr>
</tbody>
</table>

This import file will lead to 3 import errors
View Import report

After the report of the import is shown.

<table>
<thead>
<tr>
<th>Tripolis Academy</th>
<th>Import report</th>
</tr>
</thead>
<tbody>
<tr>
<td>CustomerDB</td>
<td>Results</td>
</tr>
<tr>
<td>Recent import reports</td>
<td>Errors</td>
</tr>
</tbody>
</table>

- **Start date-time**: 2010-05-19 10:48:30
- **Validating duration**: 00:00:00
- **Transfer duration**: 00:00:00
- **Database duration**: 00:00:00
- **Total duration**: 00:00:01
- **Contact Database**: CustomerDB
- **Group**: fase_1
- **Imported by**: wgiskes@tripolis.com
- **Import mode**: Add or update contacts to a group
- **Import status**: ENDED
- **Imported file**: daxis
- **Source**: Web

**Import results**: Displays the total contacts added to a group and the total records deleted from a group.

**Import errors**: Displays the total records not imported due to errors.

- e.g. an INTEGER field has been chosen while the import file is not INTEGER but text

**When the import is finished**
On the left side of the screen you’ll find all import reports. Click on a report to open the required report.
Export Contacts

You are able to export several types of contacts, e.g. exports contacts from a certain group, export all contacts from the database or export contacts on a mail blacklist.

Depending on the type of export you have the option to choose export fields.

Steps

1. Click Export

2. Depending on the type of export you have the option to choose export fields.

3. Select All or select the required fields by holding the ‘CTRL’ key.

4. Select an export format. Excel or CSV.
   It is not recommended to edit a CSV file in Excel. Preferred use ‘OpenOffice’ or a database application as MSAccess.

5. Click Export.

6. Save the file as, or open the file.

If you export a Group, you are also able to include subgroups by selecting the tick box “include subgroups”
Groups

Introduction
Groups are selections of contacts from the database. A group is a selection of contacts and their profiles. These groups are being used for mailings, SMS and campaign events.

Groups can be separated in

- Static groups
- Segments
- Subscription groups
- Smartgroup

A Static group is a selection of contacts. This selection is based on a query. Contacts which matched this query are saved in a group and not the query itself.

A Segment is also a smartgroup, but within a static group. The query criteria is in this case only applicable for contacts in the selected group.

A Subscription group is the same as a static group, however only (un)subscribers are administered in this kind of group. You can only report on (un)subscribers for groups of this type.

A Smartgroup is also called a dynamic group. Within a smartgroup the query criteria is saved. New contacts added to the database and matching the query criteria are automatically added to this smartgroup.

Working with static groups will be faster as working with subscriber groups as for each mutation (split, merge, exclude & import) subscription events need to be updated for the selected records.
New Group.
Before sending your mailing to a Group it is advised to send a mailing to a test group.
To get a good idea how your mailing is received by the different domains it is also advised to add several email clients to the test group. E.g. @hotmail.com, @gmail.com, @yahoo.com

Steps
1. Click Group to create a new contact group.
2. Click New
3. Enter a label.
4. Enter a Name.
5. Select the Group Type; Static, Subscription or Test group
6. Select a Parent group if the new groups is a subgroup of a parent group.
7. Click Save.

Group display
Click on the + symbols of the different groups on the left side of the screen unfold and view all groups.

Click on a Group. On top you’ll see Information, Contacts, Communication history and Subscriptions. It opens in the Information screen.

Information
In this Area, you’ll see the label, name and the type of this group. Also you can see the amount of Contacts in this particular group.
From this point, you can perform actions on the group. These actions will be explained below

**Edit:**
Click **Edit** to edit the group label, name, group type or to select a Parent group.

**Archive:**
You are able to archive the group. After archiving, you are still able to access this group in the archive area. You’re able to unarchive these items at any time. Just go to the archive folder in the tree structure by Groups, click on the required group and click on Unarchive.

**Delete:**
Click **Delete** to delete the complete group. Contacts will remain in the database.

**Merge:**
You are able to merge groups. You will have to choice to delete or keep the group you merge.

**Steps:**
1. Click **Groups**
2. Select the group you want to move or copy into another group (**Source Group**).
3. Select if you would like to **merge subgroups**.
4. Select the **Target group**.
5. Select if you want to **Copy or Move the source group into the target group**.
6. Click **Save**.
Undouble:
You are able to select unique contacts of a group based on the values of any field in the contact database and save the result as a new group.

**Steps**
1. Click **Groups**
2. Select the **required group**.
3. Click Undouble.
4. Select the field to undouble.
5. Tick the checkbox if you want a notification.
6. Enter a new label.
7. Enter a new name
8. Click on Execute.

Contact which doesn’t have the selected value will be added to the new group and contacts with the same value will be undoubled.

Only 1 contact with the selected value will be added to the group.

Exclude:
Contacts in a group can be excluded from another group.
The contacts in the source group will be excluded from the target group.

**Steps**
1. Click **Groups** and
2. Open the group where you want to exclude contacts (**Source group**).
3. Click on **Exclude**.
4. Select **including source subgroups if required**.
5. Select the **Target group** which will be used for excluding contact.
   Contacts will be deleted from this group.
6. Select **including target subgroups if required**.
7. Tick the checkbox if you want a **notification email**
8. Click **Next**.

   The total to be excluded is displayed on the screen.
9. Click **Finish**.

Excluded contacts can only manually be added to the Group.
Split:
Splitting groups can be useful if you would like to investigate if a mailing will have a higher response when using different formats.

By splitting a group you can send both of your mailing formats to one of these groups.

**Steps**
1. Click Groups.
2. Open the group you want to split (This is the Source group)
3. Click Split
4. Select Randomize contact order to split the contacts randomly.
5. Enter a New contact group label.
6. Enter a New contact group name.
7. Set the number of contacts for the new group
8. These contacts will be removed from the source group.
9. Click Save.

Multisplit:
It is possible to split your group in multiple groups. The original group will be removed.

**Steps**
1. Click Groups.
2. Open the required group (Source group). This is the group which will be split.
3. Click on MultiSplit.
4. Select Randomize contact order to split contacts random.
5. Set the total Amount of new target groups.
6. Click Save.

The source Group is replaced by new groups with -1 / -2 / -3 extensions.
Segment:
A Segment is a smart group within a static group where as well the result as the selection criteria are saved. The criteria selection is only applicable for the contacts in that specific static Group.

All contacts in a segment are per definition also in the static Group.

Steps
1. Click Groups.
2. Open the required group.
3. Click Segment to start a new Query.
4. Select via the 1st dropdown menu a database field.
5. Select via the 2nd dropdown menu a parameter.
6. Add the required matching value in the text field. 
ed. Company is equal to Tripolis
7. Click Add condition to add an extra condition.
8. Show segment to run the query.

The result will be displayed, you have the following options:

- Click Save to save the selection as a segment in the Group. Enter a label and name and click save.
- Click Fill Field Values to add a value to a certain field.
  - Select the Field
  - Select Fixed Value to add a fixed value to the selected database field.
  - Select Number Sequence to add a number sequence to a field. Enter the initial value and a variable step value if required.
You can select and **Delete** contacts from the results of the query. They will be removed from the database.

---

**Export:**
You are able to export several contacts in a Group. You have the option to choose export fields.

**Steps**
1. Click **Groups**
2. Open the **group** you want to export
3. Depending on the type of export you have the option to choose export fields.
4. Select **All** or select the required fields by holding the ‘CTRL’ key.
5. Select an export **format**. Excel or CSV.
   - It is not recommended to edit a CSV file in Excel. Preferred use ‘OpenOffice’ or a database application as MSAccess.
6. Click **Export**.
7. Save the file as, or open the file.

---

**Contacts**

---

**Export contacts of database CustomerDB**

- **Number of contacts**: 3
- **Database fields**: Select all fields
- **File type**: Excel or CSV
- **Send notification email**: Yes

---

**List contacts for group testgroup**

Results 1 - 3 of 3.

<table>
<thead>
<tr>
<th>View</th>
<th>Edit</th>
<th>Delete</th>
<th>Remove from Group</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>15</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email</th>
<th>Firstname</th>
<th>Lastname</th>
<th>Movie</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:testtripuck@gmail.com">testtripuck@gmail.com</a></td>
<td>Richard</td>
<td>Smith</td>
<td>false</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:testtripuck@gmail.com">testtripuck@gmail.com</a></td>
<td>Michael</td>
<td>O'Brien</td>
<td>true</td>
<td>31924715768</td>
</tr>
<tr>
<td><a href="mailto:testtripuck@gmail.com">testtripuck@gmail.com</a></td>
<td>Michael</td>
<td>Smith</td>
<td>false</td>
<td></td>
</tr>
</tbody>
</table>

Results 1 - 3 of 3.
The total number of contacts in a group is displayed above the list of contacts. "Results 1-3 of 3"

The total amount of contacts on screen can be set to 15, 50 or 100. Defaults is 15.

It’s easy to search in groups. Enter a value in one of the filter fields and press enter. The search relates only to that particular database field of that group.

When entering multiple filter values the search will be based by AND statements.

To view the whole list of contacts empty the filter fields and press enter.

**View:** You can view contacts on individual level by clicking on the contact or tick the box and click on View.

**Edit:** To edit a contact, tick the checkbox on a contact and click Edit.

**Delete:** To delete a contact, tick the checkbox of the contact and click Delete. The contact will be removed from the database and all the groups where.

If you want to delete a contact from a group, click Edit, select the Subscriptions and remove the tick from the required group and Save.

It is also possible to remove a contact from the group perspective. Click in the tree structure on the left the required group. Click on Contacts. Tick the checkbox of the contact you want to remove from the group and click on Remove from Group.
Communication history

In the Communication history by groups, you’ll find an overview of all communication reports linked to this group. In the reports you’ll find detailed information about the mailing. Reports will discussed on page 176.
Subscriptions

You can see the amount of subscribers for a group by Subscriptions. This is only with groups of the type Subscription.

Steps
1. Click Groups
2. Open the required Subscription group
3. Click on Subscriptions
4. Here you can select a period
   - pre-selected period
   - exact period.
5. Click Display

Subscription history for contact group ABC newsletter subscribers

Select a period:
Select a pre-selected period:
Select reporting interval:

<table>
<thead>
<tr>
<th>Date</th>
<th>Subscribed</th>
<th>Unconfirmed</th>
<th>Unsubscribed</th>
<th>Balance</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>May, 09</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>Jun, 09</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Jul, 09</td>
<td>2,221</td>
<td>0</td>
<td>1</td>
<td>2,220</td>
<td>0</td>
</tr>
<tr>
<td>Aug, 09</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Sep, 09</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Oct, 09</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Nov, 09</td>
<td>0</td>
<td>0</td>
<td>400</td>
<td>-400</td>
<td>0</td>
</tr>
<tr>
<td>Dec, 09</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Jan, 10</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Feb, 10</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Mar, 10</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Apr, 10</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
**Mail blacklist**

In case of a contact with an invalid e-mail address, e-mails will never receive a contact. These e-mail addresses are called **hard-bounces**. All bounces are placed on the ‘Mail Blacklist’.

The mail blacklist is being used to exclude invalid addresses when sending a mail to a group of contacts.

**Query**

With the query wizard you are able to make contact selections within the database. You are able to run as many queries as needed to get the desired selection of contacts. As well the query result as the query selection criteria can be saved.

You have the following options.

- Save as a **smart group** (selection criteria + result)
- Save as a **group** (result)
- Add to an **existing group**.

**Steps**

1. Click **Groups**
2. Click **Query**
3. Select **Profile field** to run a query on selected database fields, or
   Select **Group subscription** to run a query if contacts are or are not in a group or subgroup.

   ![Perform a query on database CustomerDB](image)

4. **Query settings.**
   The 1st dropdown contains the database fields.
   The 2nd dropdown contains the selection parameters (*equal to, contains, etc*)
   The 3rd field needs a value.
   E.g. **City > equals > Amsterdam**

5. Click Add condition to add an extra condition.
   When running a query with multiple rows by default the **All** statement is used.
   Instead of **All** you also can select **Any** or **Advanced** as a statement
   - **All**: The results match all of the selection criteria
   - **Any**: The results match one of the selection criteria
   - **Advanced**: You can use **AND/OR** for the multiple criteria

See the examples below, for how it is used
Criteria 1: Sex equals Man.
Criteria 2: Newsletter equals True.

**All** will list Man who subscribed for the newsletter.

**Any** will list Man and contacts (including women) subscribed for the newsletter.

Example.
Criteria 1: Place is equal to Amsterdam.
Criteria 2: Interest is equal to software.
Criteria 3: Interest is equal to computers.

Advanced settings **1 AND (2 OR 3)** will list contacts in Amsterdam who showed interest in computers or who showed interest in software.

6. Click **Run** to run the query.

The results will be displayed on screen.

After you run the query, you’ll have the following options.

- Click **Save as Smartgroup** to save the criteria and results in a smartgroup.
- Click **Save as group** to save the result. After entering a label and a name you can select a Parent group if required.
- Click **Add to group** to add the results to a group.
- Click **Fill Field Values** to add a value to a certain field.
  - Select **Fixed Value** to add a fixed value to the selected database field, or
  - Select **Number Sequence** to add a number sequence to a field. Enter the initial value and a variable step value if required.
• Click **Delete contacts** to delete the selected contacts from the database.
• Click **Export** to export the results of your query

**Smart group**

A **smart group** is also called a dynamic group. Within a smartgroup the selection criteria is saved. New contacts in the database who meet the selection criteria will automatically be added to this smart group.

Smart group are selections of contacts in the database. Before you can create a smart group you first need to set a query.

When you run queries on an existing static group, it is not a Smart group. This is called a Segment. As well the result as the selection criteria are saved. (New) Contacts added to this static group and matching the query criteria will automatically be added to this segment.

**Direct export query or direct save query without running**

You are able save a query as a smart group without running the query first.

**Steps**
1. Click **Query**.
2. Set the query.
3. Click **Save as smart group**

**Delete multiple contact groups at once**

You have the option to delete multiple groups at once.

If you delete a parent group, all under laying groups will also be deleted.

**Steps**
1. Click **Groups or Smartgroups** on the left side of the screen.
2. Select the groups you wish to delete.
3. Click **Delete**.
**Mail blacklist**

In case of a contact with an invalid e-mail address, e-mails will never be delivered to that contact. These e-mail addresses are called **hard-bounces**. All bounces are placed on the ‘Mail Blacklist’. The mail blacklist is used to dup-delete invalid addresses when sending any mail to a group of contacts.

Bounced e-mail addresses will be stored on a blacklist.

- e-mail addresses either on mail blacklist or on the client blacklist are excluded for mailings.
- These addresses will get the status 'not send'.

A blacklist lists all hard-bounce e-mail addresses.

An e-mail address is on a blacklist and not a contact itself.

If the mobile number of the contact on a blacklist is known you are still able to send this contact a SMS message.

You’ll have the following options:

- **Edit contact**
  - Select a contact and click edit to edit the details of that contact
- **Delete**
  - Select a contact and click delete to remove the contact from the blacklist.
- **Export**
  - Click export to export all of the selected contacts
- **Copy to client blacklist**
  - You are able to copy the selected contacts from the mail blacklist to the mail blacklist on client level. (see also mail blacklist on client level)

**E-mail blacklist filter**

Both the e-mail blacklist per contact database as the e-mail blacklist on client level have search filters.

**E-mail blacklist per contact database.**

Filter by e-mail address.
E-mail blacklist on client level.
Filter by e-mail address or filter by comment.

Email blacklisted contact visible in contact overview

When viewing the details of a contact a blacklisted email is being indicated and it is possible to remove the corresponding mail blacklist entry in the contact database.

Click |X| to remove the contact from the mail blacklist.

If the mail blacklist on client level is switched on, contacts will still be listed on the client blacklist. These contacts need to be removed manually from the client mail blacklist via Settings | publishing.
TRIPOLIS DIALOGUE

CONTENT MODULE
**Introduction**

The Content module allows you to conveniently create and manage SMS messages, Direct mails and Newsletter editions.

From the content module you are also able to publish your content.

The media repository is a collection of newsletter-articles and images.

These articles and images can easily be used in newsletters and direct mails.
Content dashboard
The content dashboard shows the five last modified newsletters and direct emails for a workspace and provides quick links to reduce the time needed to access the different items.

**preview**
The 'preview' link opens a modal screen that shows a preview of that newsletter or direct email directly from the dashboard.

**editor**
The 'editor' link links you directly to the editor for that newsletter or direct email.

**quick send**
The 'quick send' opens the 'quick send wizard' directly from the dashboard, allowing you to easily send a preview of that newsletter or direct email.
**New SMS message**

From the Content module you are able to create and manage SMS messages. Before you can create SMS messages you need set up at least one SMS type. (see: Content settings)

In the Content module you need to select the required workspace. If there is only one workspace, this workspace will be selected by default.

**Steps**

1. In the **Content module** click **SMS Message** and **New**.
2. Select the **SMS Message Type**.
3. Click **Next**.
4. Enter a **Label**.
5. **Originator** If you leave this field blank, the originator value from the SMS type will be used. However you can enter a name of your choice here as well. The Originator can only be 11 characters long.
6. Compile the **SMS Message**. You are able to personalize your SMS message by inserting database fields.
7. Create your **Alternative Message**. You can’t personalize alternative SMS messages.
8. Select contact database fields to insert via the **insert merge field** dropdown.
9. Click **Save**

   To avoid losing work always click save before you click on preview.

A SMS message can contain a maximum of 160 character. When there more characters are used after personalization a recipient will receive the alternative text message.
Personalize SMS Originator
The originator of an SMS message can be personalized

Edit SMS message Anouk

<table>
<thead>
<tr>
<th>Label:</th>
<th>Anouk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>anouk</td>
</tr>
<tr>
<td>Originator:</td>
<td>Dear ${contact.firstname}</td>
</tr>
<tr>
<td>Message:</td>
<td>Dear ${contact.firstname} from ${contact.city}, Welcome to...</td>
</tr>
</tbody>
</table>

SMS preview

Preview enables you to view the SMS message as it will be received by a contact.

To avoid losing work always click save before you click on preview.

Steps

1. Click **Preview**.
   - The SMS message, including used contact database fields are displayed. The alternative SMS message is also displayed.

2. Click **Personalized** to convert the database fields with field values.

3. Use the dropdown to choose a group of contacts for personalization examples.

4. Click **Refresh Contact** to view the different personalized examples.

5. Click **Edit** if you want to make any changes to the SMS message.

6. Click **Save**.

Once finished, you can send SMS messages via the Publishing module.
**Edit SMS message**

**Steps**

1. Click **SMS** and Browse.
2. Select the required SMS message on the left side of the screen.
3. Click **Editor** if you want to edit the SMS message.
4. Click **Save** when finished.

After you save the SMS message click preview to display the SMS as it will received.

Once finished, you can send SMS messages via the Publishing module.

---

To avoid losing work always click save before you click on preview.
**New Direct Email**

From the Content module you are able to create and manage Direct Mails. Before you can create a Direct Mail you need to set up at least one Direct Mail type. (see: Content settings)

In the Content module you need to select the required workspace.
If there is only one workspace, this workspace will by default be selected.

**Direct Email details**

**Steps**

1. In the Content module click Direct Email and New.
2. Select the email type via the dropdown menu.
3. Click Next.
4. Enter a Label.
5. Enter a Name.
6. Enter a Subject
7. Enter Description
8. Enter a From name.
9. Enter a Reply-to address.
   (By default it is the From address)
10. Click Save.

The direct email editor will start.
Direct Email Content

After creating the Direct Email properties, you are able to create your Direct Email.

You have the following options:

To avoid losing any work, always click first Save.

- **Preview**
  Enables you to display a HTML and Text preview as it will be received by a contact.
  1. Click Preview.

The Direct Mail, including used contact database fields are displayed.

  2. Click Personalized to convert the database fields with into the field values.

3. Use the dropdown to choose a group of contacts for personalization examples
4. Click Refresh Contact to view the different personalized examples.

Select Text for a personalized text example.

- **HTML WYSIWYG** implies a user interface that allows the user to view something very similar to the end result while the document is being created. In general WYSIWYG implies the ability to directly manipulate the layout of a document without having to type or remember names of layout commands.

  WYSIWYG will be outlined in the WYSIWYG chapter.
• **HTML Source**
  Click on HTML source to view, edit or paste the HTML code.

You are also able to import your direct mail content via a live URL or import via a local HTML File.

**Steps**
1. Click Import File
2. Enter URL
3. Click Grab Content or
4. Click Grab File
   
   The HTML will be copied into the HTML source field
5. Click Save

Click on the **preview** tab to see the preview of your imported content

• **TEXT**
  Besides a HTML version of your direct mail you need to create a text version for your direct mail.

A text version will be displayed when an email client does not support HTML. A direct mail will be send multi part; as well the HTML as the Text version will be send. Depending on the receivers email client, either the HTML or Text version will be displayed.

Once you created a HTML version you can conveniently copy the HTML to Text. Click **HTML to TXT** to convert. The HTML version transform in a Text version.

If required you can insert database fields for personalization purposes.

URL’s such as click here to don’t work in a text version. The web address however will be displayed.

Edit the text as required and click **Save**.
Properties Click the properties tab to edit the direct mail properties.

Quick Send

Quick mail allows you to conveniently send your email (as a test) to 5 different receivers.

Steps

1. Click Quick Send, the wizard starts.
2. Enter the required email addresses, separated by a ; (semi colon)
3. The Subject is taking over from the direct mail, if required you can overwrite this.
4. To personalize the email, please mark the checkbox; the mail will be send to the receiver with a randomly chosen contact from the database.
5. Click Next to send the test mail. In the next screen you get a confirmation and overview of the publish.
6. Click Finish to return to the content module.
Publish
From the content module it is possible to publish your mailings.

This option is only available in the preview tab.

Steps
1. Click on Preview
2. Click Publish.
   The wizard starts.
3. Select the group you wish to send the mailing to.
4. Click Next

As you start to publish from a mail (newsletter or Direct mail) the wizard will automatically select mailing type, email type and the email.

5. Select the maximum number of emails to send per hour; required for load balancing.
6. Select the Method (Test, Schedule, Now)
7. To validate URL’s on images and links in your message check the box "Check all urls".

When there are many links in a mail which lead to your website and you expect a lot of clicks your web server might not be able to handle the traffic. In that case it is advised to select a less maximum of emails to be send per hour.

On the next page you’ll find an overview of the different sending methods.

- Send test messages
- Schedule
- Send now
Method 1: Test

Select send test messages and click next.
Select the test group(*) for the test mailing, or
Select a number of samples of real data(**) that you would like to use to send as message.
Persons in the test group(*) will receive an equal amount of e-mails as the total(**) selected persons. The e-mails will be personalized with contact details from the selected group(*).
Recipients from the test group will receive as well a HTML as a text version.

Method 2: Schedule

Select Schedule and click next.
Select time and date you wish to publish.

Click Next

Method 3: Send now

Select Send now and click Next.

The last step before sending is to check your selections.

- **From name / From Address** are taking over from the email type created in content settings.
- **Subject, Workspace** and **Contact database** are taking over from the mailing created in the content module.
- **Group** was selected in the Publishing wizard, the total contacts in this group is displayed.
- **Email** Selected in the Publishing wizard.
- **URL checked** only applicable if you have this option selected in the wizard. The results are listed.
- **SPF Check** lists if a SPF record is available for the domain in the From address and the Return-path.

Sender Policy Framework (SPF) allows the owner of a domain name to publish information about its use in an email return address during a Simple Mail Transfer Protocol (SMTP) session. SPF allows software to identify and reject messages that are not authorized to have the domain named used. This is intended as a means of detecting some forms of e-mail spam.
8. Tick “hereby confirm the sending of information as specified above”
   - Click Previous to edit the details.
   - Click Cancel to cancel this mailing.
   - Click Send now or Schedule.

<table>
<thead>
<tr>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>From name / From address: Wouter (<a href="mailto:wouter@tripolis.com">wouter@tripolis.com</a>)</td>
</tr>
<tr>
<td>Subject: ABC Mail</td>
</tr>
<tr>
<td>Workspace / Direct e-mail: User Training workspace / Direct email</td>
</tr>
<tr>
<td>Contact database / Group: User training / ABC newsletter subscribers</td>
</tr>
<tr>
<td>Contacts in group ca.: 1822</td>
</tr>
<tr>
<td>Not sent contacts ca.: 1730</td>
</tr>
<tr>
<td>Unconfirmed contacts ca.: 0</td>
</tr>
<tr>
<td>Send contacts ca.: 811</td>
</tr>
<tr>
<td>URL's checked: The URLs have not been checked.</td>
</tr>
<tr>
<td>SPF check: There is a SPF record available for the domain of the from address. There is a SPF record available for the domain of the return-path.</td>
</tr>
<tr>
<td>Preview: HTML version / Text version</td>
</tr>
</tbody>
</table>
Newsletters

From the Content module you are able to create and manage Newsletters. Before you can create a Newsletter you need to create a newsletter type, newsletter sections, article types and article templates in the Setup module (by Content).

In the Content module you need to select the required workspace. If there is only one workspace, this workspace will by default be selected.

New Newsletter

**Steps**

1. Click Newsletter.
2. Click New.
3. Select the **Newsletter type** via the dropdown menu.
4. Click Next.
5. Enter a **label**.
6. Enter a **Name**.
7. **Subject** when there is a default subject in the newsletter type, it will be listed here. However you are able to overwrite the subject.
8. **From name From Address** you are able to overwrite this if required. Details come from newsletter type settings.
9. **Reply to address** when left blank the from address will be used as the reply address.
10. Click **Save**.

The newsletter editor starts

You are now able to create a newsletter.
**Newsletter Article**

Creating newsletters is done by the use of article types (e.g. header, article, footer). You also need to set the section of the article type. The section represents the position of the article in a newsletter.

It is also possible to copy or assign articles from the media repository.

**Steps**

1. Click on Articles

2. Click New Article.

3. Enter a Label.

4. Enter a Name.

5. Enter one or more Tags, separated by a space.

6. Select the Article type via the dropdown menu.

   The different article types are set in the Setup module.

7. Click Next.

A tag is a keyword. With this key word you are able to find articles or images by their tag name in the Library.

Images are only stored in the Library when they have tags.
When adding an article to a newsletter the label and name are automatically filled with the label and name of the newsletter edition, section and the position within that section. In the screenshot above the label is made up of the newsletter label 'editie #1' the section label 'business' and the position of the article in that section '5'.

You are now able to create your content for this article.

1. **Article** Enter an Article title if required
2. **Article Text** Create your article content with the WYSIWIG editor and Freemarker code.
3. **Article image** Click on ![image icon] to insert an image from the media repository
4. **Article Link** Enter a link to a web address if required.
5. Click **Save**.
The article is saved in the articles

You are now able to create another article.
You are also able to edit articles.
In edit mode you are able to add conditions to an article.
Copy articles from library

Articles are stored in the library.

When an article is provided with a tag, this tag can be used as a keyword. With this key word you are able to find grouped articles (or images) by their tag name in the media repository. Once you found the required article or image you are able to conveniently copy to a newsletter.

Steps
1. Click Newsletter
2. Select on the left the required newsletter.
3. The newsletter will be opened in the Preview mode.
4. Click on Articles
5. Click Insert from library.
6. Use the article tag dropdown menu to list articles with the same tag, or use the search box to find a certain article.

7. Select the required article and click copy, or double click on the required article

8. In the next screen you can enter a new name, label and tags.
9. Define the Article type.
10. Set the Section via the dropdown menu. Sections have been created in Content settings
11. Set the article position in the section.
12. Click Next.
The article is copied from the media repository and added to the newsletter.

**Assign Article**

Next to copying articles you are also able to assign articles.

The difference between copy and assign is, a copy is a physical copy which will be used once in a newsletter. After you copied the article you are able to edit this article for that particular newsletter. If you assign an article and edit the article in the media repository, the changes will occur for all newsletters the article is assigned to. Applicable for newsletters not yet send.

You are able to assign articles from the Content module or from the Media Repository.

**Steps**

1. Click **Newsletter | Browse**.
2. Select the required newsletter.
3. Click on the **Article** tab.
4. Click **Assign Article**.
5. Select the section for the article.
6. Select the article from the media repository.
7. Click **Assign**.

The article is assigned to the newsletter.

If you edit this article in the media repository, changes are applicable for all Newsletters the article is assigned to. Only applicable for newsletters which have not yet been send.
**Edit Article & Article conditions**

After you created an article you are able to edit the article instantly. Also at this moment you can add conditions to an article.

**Steps**

1. Click **Newsletter**
2. Select the required newsletter
3. The Newsletters opens in the preview mode.
4. Click **Editor** to edit the content of the newsletter or to move sections if required.

5. In a section click **Edit** to edit the article.

You can conveniently move sections in a newsletter by holding the left mouse key on the section and drag it to the preferred position.

You’ll have the following options.

- Edit **fields**
- Edit article **Properties**
- Set **Conditions**
• Edit Fields

Via Fields you are able to edit the content of the article.

- Edit article Properties

Click properties to edit Label, Tag, Section or Position in the section.

• Set Conditions

You are able to add conditions to a newsletter article.
If your newsletter has multiple sections you can add conditions to an article.
With a condition you can define who will and who won’t see the article in the newsletter.

These are contact database field conditions or group membership conditions.

For example:

- Set a language condition.
  Only show the article when a contact has English as language registered.

- Set advertisements yes or no.
  Only show advertisements when a contact registered to receive advertisements.

- Display an article only to contacts in a certain group.
**Steps**

1. Click **Newsletter**.
2. Select the required newsletter.
3. The newsletter will open in the preview mode.
4. Click **Articles** and click on the required **article type**.
5. Click on **Conditions**
   
   You can now set your conditions.

6. Select a database field via the 1st dropdown menu.
7. Select a parameter via the 2nd dropdown menu.
8. Add the required condition. E.g. **Sex equals Woman**.
9. Click **Add row** for another condition
   
   Or

10. Tick **Contacts** and select a group from the dropdown menu.
11. Click **Save** to add the condition to the article.

The newsletter article will display if there is a Condition.
In this edition

- Woman Runs Across America

ABC PRESS

left column Add new

Article label: ABC news 2010 Edit Remove
⚠ Conditional

Woman Runs Across America

HAPPY NEWS

Illinois native Katie Visco is running across America to inspire others to find their inner passion. She also hopes her run will inspire young women to improve their self esteem. Visco hopes to reach San Diego by Christmas.
Library

The Library is a collection of articles and images. Before you can attach an image to any content, the image needs to be stored in the Library.

Tags.
A tag is a keyword which enables you to group articles or images. Via a tag you also can easily search for articles or images.

Add image

Steps
1. Click Library.
2. Click on images on the left in the tree.
3. Click New.
4. Enter a Label.
5. Enter a Name.
6. Enter Tags.
   You can enter multiple tags, followed by a space.
7. Enter an image description if required.
8. Click browse to attach the image.
9. Click Save. The image is saved in the media repository.
Add Article

Steps
1. Click Library.
2. Click on Articles on the left in the tree
3. Click New
4. Select the Article type
5. Enter a Label
6. Enter a Name
7. Enter Tags. You can enter multiple tags, followed by a space.
8. Click Next
9. Create an Article.
10. Click Save

The article is saved in the Library.
Browse Library

Click Search o search for articles and images.

**Steps**

1. Click **Library**.

2. In the selected workspace you’ll find on the left Articles and Images and their Tags.

3. Click on a tag to display grouped articles or images.

4. Click **Edit article Tag** to edit the media tag.

5. Click **Delete article Tag** to delete the tag.

6. Click on one of the articles or images for details.

7. Click on **Image properties** to change article or image properties.

You’ll have the following options.

Click **Save** to save changes.

Click **View** to view the image or article

Click **Delete** to remove an image or article.

Click **Image editor** to edit an image or article.
Image Editor

Via the image editor you are able to edit images.

Click **Undo / Redo** to cancel image adjustments.
Click **Select all** to select the image.

Click **Zoom in / Zoom out** to zoom an image.
Click **Deselect** to deselect an image.

Click **Crop** to cut a part of the image.
Click **Resize** to change the size of the picture.
Click **Rotate** to rotate an image.

Click **Colours** to change the contrast colours.
Click **Lighten** to change the brightness of an image.
Click **Sepia** to change the colour of an image.

Click **Red Eye** to reduce red eyes.
Click **Enhance** for auto enhancement
Click **B&W** to change the image to black and white.

Click **Rounded** to round the image borders.
Click **Filter** to apply a colour filter to the image.
Click **ABC** to add a text to the image.

Click **Save** to save the adjustments.
Click **Save as** to save the image as a copy.
Upload image to library from any content

In direct mails or newsletters you have the option to upload images to the media repository.

**Steps**

1. In any content click **Choose image and insert this**.

2. Click **Upload image**.

3. Enter an image title.

4. Enter a **tag**. You can enter multiple tags, followed by a space.

5. Enter an image description if required.

6. Click **browse** to attach the image.

7. Click Save.

8. Click on the image to insert this in your content.
**Archive items**

You are able to archive contact groups, smart groups, direct emails, newsletters and mailings. After archiving, you are still able to access these items in the archive menus. Archived items won’t be listed during the selection of details during publishing.

You are able to unarchive these items at any time.

**Steps**

1. Click on the required group to archive and chose **Archive**

2. The group will be archived.

3. If you want to deactivate, click **archive** in the list of groups.

4. Select the group and click **unarchive**

You are able to archive items in

- Contact module.
- Content module.
- Publishing module.
**Test procedures**

Before you send a mailing to a group of your contacts it is advised to send your mailing first to a test group. It is also advised to have several e-mail clients, such as @hotmail, @gmail, @yahoo etc. in this test group. This will give you a good overview of how your mailing will be displayed by the different e-mail clients.

In order to send a test mailing you need to have a test group. This group needs to have the group type **Test**

See: Groups in Contact Module.

There are 3 different types of tests
- **Preview**
- **Quick send**
- **Send to test group**

**Preview**

In the content module you are able to display a preview of your content. You also have the option to personalize the preview.

Click **Preview**.

![Preview](image)

Click either HTML or Text to preview.

Tick personalized to display a preview with personalized contacts values.

You are also able to select a Group with contacts for personalization purposes. If you don’t select a group a random contact from the database will be chosen.

Click **Refresh Contact** to view the personalization with another contact.
**Quick send**

Quick email enables you to send your mail as a test to maximum 5 mail addresses.

1. Click **Quick email**, the wizard starts.
2. Enter the e-mail addresses, separated with “;”.
3. If required you can overwrite the subject.
4. Mark the checkbox for personalization purposes and select the group to be used for personalization.
5. Click **Next** to send the quick e-mail. A confirmation will be displayed.
6. Click **Finish** to return to the content module.

**Send to test group**

You also can send your mail to a test group. You need to have a test group created in the contact module. You can send a test mailing to the test group in the publishing module or in the content module.

In the content module is this option available in the preview tab.

**Steps**

1. Click op **Publish**. The wizard starts.
2. Select the maximum number of emails to send per hour; required for load balancing.

```
<table>
<thead>
<tr>
<th>Contact Database</th>
<th>User Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>groups</td>
<td>Test Group</td>
</tr>
<tr>
<td>Mailing type</td>
<td>newsletter</td>
</tr>
<tr>
<td>Newsletter types</td>
<td>save the whole</td>
</tr>
<tr>
<td>Newsletter</td>
<td>edit week 41</td>
</tr>
<tr>
<td>Check content personalisation</td>
<td>( This could take some time )</td>
</tr>
</tbody>
</table>
```

3. Select the Method (Test, Schedule, Now)

4. To validate URL’s on images and links in your message check the box "Check all urls".

```
<table>
<thead>
<tr>
<th>Select send option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select max mails per hour: 500000</td>
</tr>
<tr>
<td>Method: Send test messages (x), Schedule (y), Send now (z)</td>
</tr>
<tr>
<td>Check all URLs? ( This could take some time )</td>
</tr>
</tbody>
</table>
```

2. **Check all URL’s.** Select this option if you want to validate all URL’s before you send your mail. This could take some time.

3. Click **Next**.

4. Select the group to that will be used for your test mail.

5. Select Send test messages to the selected test group or select a sample of x persons of the group (selected in the first wizard step) list (max 20) and send these to the test list.

The last step before sending is to check your selections.

- **From name / From Address** are taking over from the email type created in content settings.
- **Subject, Workspace** and **Contact database** are taking over from the mailing created in the content module.
- **Group** was selected in the Publishing wizard, the **total contacts** in this group is displayed.
- **Email** Selected in the Publishing wizard.
- **URL checked** only applicable if you have this option selected in the wizard. The results are listed.
• **SPF Check** lists if a SPF record is available for the domain in the **From address** and the **Return-path**.

Sender Policy Framework (SPF) allows the owner of a domain name to publish information about its use in an email return address during a Simple Mail Transfer Protocol (SMTP) session. SPF allows software to identify and reject messages that are not authorized to have the domain named used. This is intended as a means of detecting some forms of e-mail spam.

• **preview HTML** and **Text version**, click on the link to preview.

• **Time** and **Date** are displayed when mailing is scheduled.

6. Tick “hereby confirm the sending of information as specified above”
   - Click **Previous** to edit the details.
   - Click **Cancel** to cancel this mailing.
   - Click **Send testmessage now**

After publishing your e-mail the publishing module will open where amongst the status of your e-mail is displayed. (See also: Publishing)

Contacts you have sent your test mailing to, will receive as well a HTML as a Text version of the email
TRIPOLIS DIALOGUE

WYSIWYG EDITOR
## Content WYSIWYG

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  * Insert Image ................................................................................ 113
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  * Insert a Link ................................................................................ 115

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**Introduction**

HTML WYSIWYG implies a user interface that allows the user to view something very similar to the end result while the document is being created. In general WYSIWYG implies the ability to directly manipulate the layout of a document without having to type or remember names of layout commands.

The WYSIWYG-editor is easy to use and makes it possible to create a HTML newsletter or direct email.

**WYSIWYG Symbols**

<table>
<thead>
<tr>
<th>B</th>
<th>I</th>
<th>U</th>
<th>Format</th>
<th>Font family</th>
<th>Font size</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Editing text**

- **Font family**
- **Font size**

- **Bold**
- **Italic**
- **Underline**
- **Striketrough**
- **Select text color**
- **Background color**
- **Cut**
- **Copy**
- **Paste**
- **Paste as plain text**
- **Paste from Word**
Aligning text

- Align left
- Align centre
- Align right
- Align full
- Unordered list
- Ordered list
- Outdent
- Indent
- Undo
- Redo

HTML

- Insert link
- Unlink
- Insert/edit Anchor
- Insert image
- Preview
- Find and replace
- Insert Date
- Insert time
- Insert horizontal ruler
- Remove formatting
- Toggle guidelines/invisible elements
- Subscript
- Superscript
HTML

- Insert custom Character.
- Insert new table.
- Table row properties.
- Table cell properties.
- Insert row before.
- Insert row after.
- Delete row.
- Insert column before.
- Insert column after.
- Delete column.
- Split table cells.
- Merge table cells.
Start with the WYSIWYG editor

New Table
It is not required to create a table, however it has several benefits. Amongst a table frames the design of your content, such as the width and height of your content.

Steps
1. Create a new table. Within the table a new content design will be made.
2. Click Insert a new table.
3. Enter the required specifications and click update.

You now created the table, within this table you can design your content. In this case the table has 3 columns, 7 rows en has in total 21 cells.
Merge Cells

Steps

1. Select the cells to merge.

2. Click Merge table cells.

3. The cells are merged.

Insert Database fields

Steps

1. Click in a cell to insert a database field.

2. Select via the merge field dropdown the required database field.

Dear ${contact.name!} ${contact.lastname!} becomes after personalization (e.g. Dear Richard Baldwin)
**Insert Image**
Before you can insert an image you need have this image stored in the Library (see also: Library)

**Steps**
1. Click in a cell to insert an image.
2. Click **choose an image and insert this**.

![Image Editor Interface]

The Library will open.
3. Double click on the required image to insert this.
4. Right click on the image and choose **image properties**.
5. Click **appearance** to set the **dimensions**.
6. Click the **General** tab to enter a **description**.

The description will be displayed when an image for any reason can’t be displayed.

7. Click **update** to return to the editor.

The image is inserted.
Add text

Steps

1. Click in the cell to enter a text.
2. Set the font type, size and colour.
3. Enter the text and click **save**

---

Dear $\{\text{contact name}\} \ $\{\text{contact.lastname}\} ,

We have started an online petition to stop the construction of several marinas near waters off Cumberland Island, GA that these whales migrate to every winter to birth their calves.
They are on the verge of extinction, even the death of just one whale could affect the survival of the species. Should the Georgia Supreme Court rule in favor of these developers it will certainly be the demise of these beautiful animals.

The GA Supreme Court will be ruling on the developers appeal case and a decision must be made by January 2, 2009. My goal is to get 5000 signatures (hopefully more) by Christmas so that I can deliver the petition and signatures to the court in
**Insert a Link**

**Steps**

1. Click in the cell to insert a link.

2. Select the text and click **insert / edit link**.

3. Enter the required **URL link** in en click **Insert**.

![Image of a link insertion process](https://dialogue.tripolis.com - Insert/edit online view link - Mozilla F)

The link is inserted.
Example Direct email

Dear ${contact.name} ${contact.lastname},

have started an online petition to stop the construction of several marinas near waters off Cumberland Island, GA that these whales migrate to every winter to birth their calves. They are on the verge of extinction, even the death of just one whale could affect the survival of the species. Should the Georgia Supreme Court rule in favor of these developers it will certainly be the demise of these beautiful animals.

The GA Supreme Court will be ruling on the developers appeal case and a decision must be made by January 2, 2009. My goal is to get 5000 signatures (hopefully more) by Christmas so that I can deliver the petition and signatures to the court in time for the ruling.

I have posted the link to the petition below. If there is anything you can do to help me get the word out about this, I would be most grateful! If nothing else, would you please forward the link to as many people as you can?

Thank you so much!

Make a donation: [Click here to donate]

Become a member [Click here to become a member]
TRIPOLIS DIALOGUE

PUBLISHING MODULE
## Content Publishing

### PUBLISHING MODULE

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Introduction
The Publishing module enables you to send SMS and E-mails. The wizard enables you to schedule, send directly or send a test to a group of contacts. You are also able to republish or clone your publishing jobs.
**Publishing dashboard**
The publishing dashboard shows an overview of today's mailings, the mailings that have ended because of an error and the paused mailings for the selected workspace.

- The percentage shows how much of the total amount of scheduled emails have been sent.
- The colors indicate the status of the mailing:
  - grey: scheduled (the scheduling time is displayed)
  - green: successfully sent
  - orange: running or paused

**Note:** Mailings that have been archived will not be shown on the dashboard.

---

**Mailings today**
Overview of the mailings that have been sent, are currently being sent or are scheduled to be send today.

**Mailings with errors**
Displays a list of non-archived mailings that have been ended because of an error. Clicking on the mailing will redirect you to the mail job's publishing details. The list of mailings shown here are not day specific. They will only disappear from the dashboard when the mailing is successfully resumed or archived.

**Paused mailings**
Displays a list of all non-archived mailings that have been paused by an user.
Publish E-mail or SMS
With the help of the wizard e-mails or SMS are published.
Regardless a direct e-mail, newsletter or SMS, the publishing functionality is the same.

Steps
1. Click email or SMS. (in this example E-mail)
2. Click New
   The wizard starts.
3. Select the group to send your communication to.
4. Select the Mailing type.
   Mailing type e-mail
   - Select the direct email type
   - Select the e-mail
   Mailing type Newsletter
   - Select the newsletter type
   - Select the newsletter
   SMS
   - Select the SMS type
   - Select the SMS message
5. Select if required check content for personalisation
6. Click Next
   As you start to publish from a mail (newsletter or Direct mail) the wizard will automatically select mailing type, email type and the email.
7. Select the maximum number of emails to send per hour; required for load balancing.
8. Select the Method (Test, Schedule, Now)
9. To validate URL’s on images and links in your message check the box "Check all urls".
When there are many links in a mail which lead to your website and you expect a lot of clicks your web server might not be able to handle the traffic. In that case it is advised to select a less maximum of emails to be send per hour.

You’ll find an overview of the different sending methods.

- Send test messages
- Schedule
- Send now

Method 1: Test

Select send test messages and click next.
Select the test group(*) for the test mailing, or

Select a number of samples of real data (** ) that you would like to use to send as message.
Persons in the test group(*) will receive an equal amount of e-mails as the total (** ) selected persons. The e-mails will be personalized with contact details from the selected group (*).

Recipients from the test group will receive as well a HTML as a text version.

Method 2: Schedule

Select Schedule and click next.
Select time and date you wish to publish.

Click Next

Method 3: Send now

Select Send now and click Next.
The last step before sending is to check your selections.

- **From name / From Address** are taking over from the email type created in content settings.
- **Subject, Workspace** and **Contact database** are taking over from the mailing created in the content module.
- **Group** was selected in the Publishing wizard, the **total contacts** in this group is displayed.
- **Email** Selected in the Publishing wizard.
- **URL checked** only applicable if you have this option selected in the wizard. The results are listed.
- **SPF Check** lists if a SPF record is available for the domain in the **From address** and the **Return-path**.

Sender Policy Framework (SPF) allows the owner of a domain name to publish information about its use in an email return address during a Simple Mail Transfer Protocol (SMTP) session. SPF allows software to identify and reject messages that are not authorized to have the domain named used. This is intended as a means of detecting some forms of e-mail spam.

- **preview HTML and Text version**, click on the link to preview.
- **Time and Date** are displayed when mailing is scheduled.

10. Tick “hereby confirm the sending of information as specified above”
- Click **Previous** to edit the details.
- Click **Cancel** to cancel this mailing.
- Click **Send now**

<table>
<thead>
<tr>
<th>Overview</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>From name / From address:</td>
<td>VPouter (<a href="mailto:vpoutre@tripolis.com">vpoutre@tripolis.com</a>)</td>
</tr>
<tr>
<td>Subject:</td>
<td>ABC Mail</td>
</tr>
<tr>
<td>Workspace / Direct e-mail:</td>
<td>User Training / workspace / Direct email</td>
</tr>
<tr>
<td>Contact database / Group:</td>
<td>User training / ABC newsletter subscribers</td>
</tr>
<tr>
<td>Contacts in group ca.:</td>
<td>1822</td>
</tr>
<tr>
<td>Not sent contacts ca.:</td>
<td>1730</td>
</tr>
<tr>
<td>Unconfirmed contacts ca.:</td>
<td>0</td>
</tr>
<tr>
<td>Send contacts ca.:</td>
<td>84</td>
</tr>
<tr>
<td>URL checked:</td>
<td>The URLs have not been checked</td>
</tr>
<tr>
<td>SPF check:</td>
<td>There is a SPF record available for the domain of this from address</td>
</tr>
<tr>
<td></td>
<td>There is a SPF record available for the domain of the return-path</td>
</tr>
<tr>
<td>Preview</td>
<td>HTML version / Text version</td>
</tr>
<tr>
<td></td>
<td>[ ] hereby confirm the sending of information as specified above.</td>
</tr>
</tbody>
</table>
After publishing your e-mail the publishing module will open where amongst the status of your e-mail is displayed.

<table>
<thead>
<tr>
<th>Status</th>
<th>Group</th>
<th>Created by</th>
<th>Schedule date</th>
<th>Ended at</th>
<th>Planned / Sent / Skipped</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK</td>
<td>Test Group</td>
<td><a href="mailto:wgiolino@tripolis.com">wgiolino@tripolis.com</a></td>
<td>2010-05-22 21:39:49</td>
<td>2010-05-22 21:39:49</td>
<td>1 / 1 / 0</td>
</tr>
<tr>
<td>OK</td>
<td>publish</td>
<td><a href="mailto:wgiolino@tripolis.com">wgiolino@tripolis.com</a></td>
<td>2010-05-22 21:39:49</td>
<td>2010-05-22 21:39:49</td>
<td>1 / 1 / 0</td>
</tr>
<tr>
<td>OK</td>
<td>Training</td>
<td><a href="mailto:support@tripolis.com">support@tripolis.com</a></td>
<td>2010-05-22 21:39:49</td>
<td>2010-05-22 21:39:49</td>
<td>1 / 1 / 0</td>
</tr>
<tr>
<td>OK</td>
<td>training</td>
<td><a href="mailto:training@tripolis.com">training@tripolis.com</a></td>
<td>2010-05-22 21:39:49</td>
<td>2010-05-22 21:39:49</td>
<td>1 / 1 / 0</td>
</tr>
<tr>
<td>OK</td>
<td>Marketing</td>
<td><a href="mailto:marketing@tripolis.com">marketing@tripolis.com</a></td>
<td>2010-05-22 21:39:49</td>
<td>2010-05-22 21:39:49</td>
<td>1 / 1 / 0</td>
</tr>
<tr>
<td>OK</td>
<td>Marketing</td>
<td><a href="mailto:marketing@tripolis.com">marketing@tripolis.com</a></td>
<td>2010-05-22 21:39:49</td>
<td>2010-05-22 21:39:49</td>
<td>1 / 1 / 0</td>
</tr>
<tr>
<td>OK</td>
<td>Marketing</td>
<td><a href="mailto:marketing@tripolis.com">marketing@tripolis.com</a></td>
<td>2010-05-22 21:39:49</td>
<td>2010-05-22 21:39:49</td>
<td>1 / 1 / 0</td>
</tr>
</tbody>
</table>

You have the following options:

- **View** to view details of a publish
- **Archive** to put the details of a publish into the archive.
- **Edit** Job to edit a scheduled job. The wizard starts.
- **Delete jobs** to delete selected publishing jobs.
- **Pause** to set a publish on hold.
- **Clone Job** to copy the job. The wizard starts.
- **Republish Job** to copy the job and refresh the job’s content.
Filter options E-mails
At the left of the screen you’ll find the following options.

Publish status: Here you can filter the status of a publishing.

Mailing type: Here you can filter on the type of mailing.

Target Group: Here you can filter on groups. Only the communication of that particular group will be displayed.

Email type: You can filter on Direct email and Newsletter

Publishing date: With this option it is possible to filter on communication by date. When you click on the input field, there appears a screen with several pre-selected values.

Archived: Here you can set if you want to see archived or non archived mailings.
**Archive items**

You are able to archive contact groups, smart groups, direct emails, newsletters and mailings. After archiving, you are still able to access these items in the archive menus. Archived items won’t be listed during the selection of details during publishing. You are able to unarchive these items at any time.

**Steps**

1. Click on the required group to archive and chose Archive

   ![Archive button]

2. The group will be archived.

3. If you want to deactivate, click archive in the list of groups.

4. Select the group and click unarchive

![List of archived contact groups](List_of_archived_contact_groups.png)

You are able to archive items in

- Contact module.
- Content module.
- Publishing module.
TRIPOLIS DIALOGUE

REPORTS MODULE
# Table of content Reports

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Introduction
Tripolis Report Management contains all the response data and graphical presentation, received from all outbound publishing per channel, such as response reports per channel, graphical presentation of clicks in email (TXT/HTML) graphical conversion, waterfall for email, subscribe/unsubscribe reporting and Advanced bounce information and reports.
**Reports dashboard**
The reports dashboard shows a list of the last ten mailings for the selected workspace. When you click on a mailing the main kpi’s are shown on the right. All the numbers are the unique counts for these indicators.

<table>
<thead>
<tr>
<th>Latest mailings</th>
<th>Statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newsletter februari 2010 - subscribers</td>
<td>Newsletter februari 2010 - subscribers</td>
</tr>
<tr>
<td>report details</td>
<td></td>
</tr>
<tr>
<td>conversion tree</td>
<td></td>
</tr>
<tr>
<td>clicks in HTML view</td>
<td></td>
</tr>
<tr>
<td>Newsletter januari 2010 - subscribers</td>
<td></td>
</tr>
</tbody>
</table>

**Report details**
Clicking on 'report details' for a selected mailing will take you to the report page for this mailing.

**Conversion tree**
This will redirect you to the conversion tree page for this mailing.

**Clicks in HTML view**
This will open a modal screen that displays the clicks on each link in a html view of this mailing.
Email

In the email section, it is possible to filter reports on Publishing status, Mailing type, Target groups, Email type and Publishing date.

In the list with reports, it is possible to see reports from single or multiple publishing’s.

**Single report:** Click on the right report or select the right report and click **Reports**.
A summary of the publishing opens. The summary report gives you an overall indication of all the key performance and response parameters of the selected issue.

<table>
<thead>
<tr>
<th>Mail</th>
<th>Total</th>
<th>%</th>
<th>100.00%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recipients</td>
<td>202303</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opened</td>
<td>198601</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not sent</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hard bounce</td>
<td>4314</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>Soft bounce</td>
<td>2520</td>
<td>1.25%</td>
<td></td>
</tr>
<tr>
<td>Delivered</td>
<td>198601</td>
<td>97.90%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Complaints</th>
<th>Total</th>
<th>%</th>
<th>100.00%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivered</td>
<td>198601</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total complaints</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AOL complaints</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotmail complaints</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outlook complaints</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yahoo complaints</td>
<td>0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opens</th>
<th>Total</th>
<th>Unique</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total open</td>
<td>4656</td>
<td>1433</td>
</tr>
<tr>
<td>Total unique Opens</td>
<td>0</td>
<td>1201</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Clicks</th>
<th>Total</th>
<th>Unique</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTR (delivered)</td>
<td>0.62%</td>
<td></td>
</tr>
<tr>
<td>CTR (opened)</td>
<td>22.7%</td>
<td></td>
</tr>
</tbody>
</table>

By using the tabs above you can navigate through the detailed reports of delivery, opens, click and conversion.

**Summary**

**Delivery** the mails that are delivered.

**Opens** the total unique opens en total opens.

**Complaints** Number of receivers who categorized the mail as SPAM.

**Clicks** The total unique clicks and total of clicks.

**CTR** (click through rate)

**CTR delivered** = Unique clicks / delivered.

**CTR Opened** = Unique clicks / total unique opens.
**Delivery:**

On this page, you’ll see details of the delivery. If there is a button after the date, it is possible to directly download the required date.

- **Recipients** the total number of contacts in the group used for this mailing.
- **Delivered** The number of delivered messages is the amount of contacts to which the mailing has been sent and for which there were no bounce messages returned.
- **Queued** the number of still to send.
- **Not sent** number of contacts on the blacklist and unsubscribers
- **Hard bounce** A hard bounce is an e-mail message that has been returned because the recipient’s address is invalid. A hard bounce might occur when the domain name doesn’t exist or the recipient is unknown within this domain.
- **Soft bounce** A soft bounce is an e-mail message that has been returned because the receiver’s mail server cannot accept the message. A soft bounce might occur when the recipient’s inbox is full.

A soft bounce may be deliverable at another time. Depending on the settings in the setup for the publishing module, sending to this email address will be retried.

- **Opens** the total unique opens en total opens.
- **Complaints** Number of receivers who categorized the mail as SPAM.
- **Clicks** The total unique clicks and total of clicks.
- **CTR** (click through rate)
- **CTR delivered** = Unique clicks / delivered.
- **CTR Opened** = Unique clicks / total unique opens.

<table>
<thead>
<tr>
<th>Delivered</th>
<th>Total</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recipients</td>
<td>202263</td>
<td>100.00%</td>
</tr>
<tr>
<td>Delivered</td>
<td>194481</td>
<td>96.00%</td>
</tr>
<tr>
<td>Queued</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>Not sent</td>
<td>40</td>
<td>0.02%</td>
</tr>
<tr>
<td>Hard bounce</td>
<td>1314</td>
<td>0.55%</td>
</tr>
<tr>
<td>Soft bounce</td>
<td>2520</td>
<td>1.25%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bounced</th>
<th>Total</th>
<th>% of recipients</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recipients</td>
<td>202263</td>
<td>100.00%</td>
</tr>
<tr>
<td>Hard</td>
<td>1314</td>
<td>0.65%</td>
</tr>
<tr>
<td>Unknown domain</td>
<td>19</td>
<td>0.09%</td>
</tr>
<tr>
<td>User unknown</td>
<td>357</td>
<td>0.18%</td>
</tr>
<tr>
<td>Account disabled</td>
<td>538</td>
<td>24.41%</td>
</tr>
<tr>
<td>Soft</td>
<td>2520</td>
<td>1.26%</td>
</tr>
<tr>
<td>Temporarily disabled</td>
<td>5</td>
<td>0.02%</td>
</tr>
<tr>
<td>Content issue</td>
<td>12</td>
<td>0.06%</td>
</tr>
<tr>
<td>Other or undefined mailbox status</td>
<td>70</td>
<td>0.35%</td>
</tr>
<tr>
<td>Unable to route</td>
<td>45</td>
<td>0.22%</td>
</tr>
<tr>
<td>Timeout</td>
<td>77</td>
<td>0.38%</td>
</tr>
<tr>
<td>Policy issues</td>
<td>96</td>
<td>0.47%</td>
</tr>
<tr>
<td>Relaying denied</td>
<td>314</td>
<td>14.47%</td>
</tr>
<tr>
<td>Quota exceeded</td>
<td>490</td>
<td>23.49%</td>
</tr>
<tr>
<td>No answer from host</td>
<td>10</td>
<td>0.05%</td>
</tr>
<tr>
<td>Unknown</td>
<td>160</td>
<td>7.86%</td>
</tr>
</tbody>
</table>

**Opens**

The Opens tab shows a graphic presentation of the number of people who actually opened the email over time.
Chart 1: Presents the opens per day for a period of 14 days.
Chart 2: Presents the number of opens for each hour of the day.

Note: opens can only be registered when the images in the email are downloaded by the recipient or when a recipient clicks on a link.

Click **Not Opens** to see which contact did not open the mailing.

Click **Save as group** to save these contacts in a group.

Click **Export** to export the report to Excel.
**Open per OS**
Click **open per OS** to list which Operating systems and Mobile devices are used to open the mailing. It is possible to save a OS type as a group. Tick the required Operating system and click Save as group.

<table>
<thead>
<tr>
<th>OS</th>
<th>Mobile device</th>
<th>Total</th>
<th>Unique</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td></td>
<td>3873</td>
<td>3223</td>
<td>04.11%</td>
</tr>
<tr>
<td>Mac OS X</td>
<td></td>
<td>512</td>
<td>369</td>
<td>10.14%</td>
</tr>
<tr>
<td>Mac OS X (Phone)</td>
<td></td>
<td>197</td>
<td>175</td>
<td>4.56%</td>
</tr>
<tr>
<td>unknown</td>
<td></td>
<td>24</td>
<td>18</td>
<td>0.47%</td>
</tr>
<tr>
<td>Linux</td>
<td></td>
<td>20</td>
<td>17</td>
<td>0.44%</td>
</tr>
<tr>
<td>Windows Mobile</td>
<td></td>
<td>3</td>
<td>2</td>
<td>0.05%</td>
</tr>
<tr>
<td>Android</td>
<td></td>
<td>3</td>
<td>3</td>
<td>0.06%</td>
</tr>
<tr>
<td>Mac OS</td>
<td></td>
<td>2</td>
<td>2</td>
<td>0.06%</td>
</tr>
<tr>
<td>Windows Vista</td>
<td></td>
<td>1</td>
<td>1</td>
<td>0.03%</td>
</tr>
</tbody>
</table>

**Opens per email client / browser**
Click **opens per email client / browser** to list which email clients / browsers are used to open the mailing.

<table>
<thead>
<tr>
<th>Browser</th>
<th>Total</th>
<th>Unique</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outlook 7</td>
<td>1980</td>
<td>1675</td>
<td>43.16%</td>
</tr>
<tr>
<td>Outlook 8</td>
<td>623</td>
<td>529</td>
<td>13.83%</td>
</tr>
<tr>
<td>Firefox</td>
<td>608</td>
<td>517</td>
<td>13.32%</td>
</tr>
</tbody>
</table>

You are able to save the contacts who opened the mail with a certain email client to a group.
**Clicks**

The Clicks tab shows a graphic presentation of the number of people who actually clicked on a link. Graphic 1; presents the number of clicks per day over a period of 14 days. Graphic 2; presents the overall number of clicks for each hour of the day.

If multiple jobs were selected only unique clicks are shown for each job.

**Clicks for all links**

This report shows the links and the number times that each link has been clicked. It is possible to save it as a group.

**Clicks per link**

Here you can select a link and show details of the selected link. It is also possible to export the list with all clicks..
Conversion

The conversion tree is a real-time visual representation of the number of contacts for each phase. The number of contacts per KPI is presented in an absolute and as a percentage of the previous phase.
**Taf**
List contacts who used Tell a Friend function.

### Tell-a-Friend report

<table>
<thead>
<tr>
<th>Contacts that didn't send emails</th>
<th>Total</th>
<th>%</th>
<th>0.00%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contacts that sent emails</td>
<td></td>
<td></td>
<td>0</td>
</tr>
</tbody>
</table>

### Content

**Preview of the mailing**

<table>
<thead>
<tr>
<th>Contact Database</th>
<th>User training</th>
<th>Status</th>
<th>Recipients</th>
<th>Schedule date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group</td>
<td>done</td>
<td>Ended</td>
<td>202001</td>
<td>20190930</td>
</tr>
<tr>
<td>From address</td>
<td>own</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct email type</td>
<td>jane</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subject</td>
<td>more info</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No contacts found in database for personalized preview.

**Cm du ha problem med att läsa det här meddelandet, klicka här**

**Hej [contact.firstname]!**

PausMail gör allt för att DU ska få de bästa erbjudanden som finns på

**Tripolis Solutions Dialogue Manual version 3.2**
# List of Jobs

Click on one of the jobs to report the job separately.

<table>
<thead>
<tr>
<th>Mailing name</th>
<th>Recipients</th>
<th>Delivered</th>
<th>Not sent</th>
<th>Hard bounce</th>
<th>Soft bounce</th>
<th>Total opens</th>
</tr>
</thead>
<tbody>
<tr>
<td>Editte 2 - gem DH - 2008-08-09 13:39:25</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>Createn 2e email - pub 2org - 2009-08...</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Stefan - gem DH - 2008-08-08 13:04:51</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>Ffram-endal2 - pub 2org - 2009-08-15 ...</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Summary tab** is a collection of the selected jobs.

**Click export comparison**

List to export Mailing name, Recipients, Delivered, Not sent, Bounced hard, Bounced soft, Total Opens, Unique opens, Total Clicks and Unique Clicks.
**Opens**

List the total unique clicks for the selected jobs.

<table>
<thead>
<tr>
<th>Summary</th>
<th>List of jobs</th>
<th>Delivery</th>
<th>Opens</th>
<th>Clicks</th>
<th>Conversion</th>
<th>Test</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opens per time interval</td>
<td>Open date</td>
<td>Opens per OS</td>
<td>Opens per email</td>
<td>client</td>
<td>browser</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Open charts for 4 jobs</th>
</tr>
</thead>
</table>

The remaining tab are equal as reporting on one job. See beginning of this chapter.

**SMS**

In the SMS section it is possible to see detailed information of the SMS communication.

**Steps**

1. Select the SMS message type on the left in the tree.
2. A list with all the SMS jobs appear.
3. Select the required job
4. Click on Reports

It is possible to filter on specific character.

- **All** to see all SMS communications
- **Test** to see only the test SMS communications
- **Sent** to see all regular SMS communication
- **Transactional** to see all transactional SMS communication

It opens in the summary page. The summary report gives you an overall indication of all the key performance and response parameters of the selected issue. By using the tabs above you can navigate through the detailed report of delivery.
Here you’ll find information about the delivery

From here, you can export bounced, skipped and delivered SMS messages.

**Campaign**

In Campaign you find all delivery details of campaigns. On the left you can navigate to your campaign. When a campaign is selected, a list of jobs open. The reporting of campaign acts the same as email or SMS
In the database section, you can generate detailed information of Subscription history and Bounces.

### Subscription history

**Steps**
1. Click on Subscription history.
2. Select a group (this can only be subscription groups)
3. Select a period.
4. Click Display

The amount of subscribers or unsubscribers, are displayed.

### Bounced

Bounced’ report generates an overview of as well soft- as hardbounces. You are able to export these details.

**Steps**
1. Click Bounced.
2. Select the period.
3. Click Display to generate the report.

Bounce report lists details of as well soft- as hardbounces. Description will list the bounce reason. Also date, email address and contact are displayed.

The total bounces displayed can be set to 15, 50 or 100.

You are able to export the bounce details by clicking on Export.
TRIPOLIS DIALOGUE

PROCESSES MODULE
Processes

Intensive actions that can take a while to finish are now running as background processes. Users can follow the progress of the process and can choose to be notified by e-mail when finished. It is not possible to start the same action multiple times.

Meanwhile a process is running in the background you are able to use Dialogue’s other functionalities. When a process is finished you are able to view the status in the process tab. Also you are able to download exports from the contact or reporting module within 24 hours in the processes tab.

On the left side of the screen the different processes are listed by Import, Groups and Export.

List of processes

Import | Group
--- | ---
Add or update contacts to a group | Exclude
Add or update contacts to a group and synchronize | Move
Exclude contacts from a group | Merge
Add new contacts to a group | Split
Add or update contacts to a database | Multi split
Add contacts to a database | Fill field values
Update contacts in a database

Export

Recipients
Contacts that opened
Contacts that not opened
Contacts that clicked
Contacts that not clicked
Contacts which mail is not delivered
Contacts which mail is delivered
Contacts which mail is bounced
Contacts in group
Contacts in smart group
Contacts in contact database
Contacts on blacklist

The functionality of the Processes tab is for all processes the same.
Below you'll find some examples.

**Steps**
1. Run the required process. Select if you want to be notified by e-mail when the process is finished.
2. Start the process
3. The process will be scheduled.
4. Click **View Details**, or click the **Processes** tab.

---

**Tripolis Academy**

- **List of processes**
  - Import (2)
  - Group (9)
  - Export (6)

  - Export Recipients (0)
  - Contacts that opened (0)
  - Contacts that not opened (0)
  - Contacts that clicked (0)
  - Contacts that not clicked (0)
  - Contacts which mail is not delivered (0)
  - Contacts which mail is delivered (0)
  - Contacts in group (0)
  - Contacts in smart group (0)
  - Contacts in contact database (0)
  - Contacts on blacklist (0)
  - Contacts that bounced (0)

---

**Asynchrone process detail**

- **Process type**: Export
- **Process subtype**: Contacts in contact database
- **Process status**: Finished
- **Start date**: 2014-05-23 04:19:34
- **End date**: 2014-05-23 04:18:35
- **User**: wgiskes@tripolis.com

**Parameters**

- **Contact database**: CustomerDB
- **Format**: xIs
- **Notification email**: ✔
- **Database field**
  - Email
  - Firstname
  - Lastname
  - Movies
  - Phone
  - Dutch

When the process is finished and you selected to receive a notification by e-mail, you will receive a confirmation in your inbox.

You are able to download the export the file within **24 hours** after the process is finished. **Weekend days are excluded from these 24 hours.**
# Table of content Campaigns

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<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
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<tr>
<td>Key features and benefits</td>
<td>148</td>
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<td>CAMPAIGNS DASHBOARD</td>
<td>149</td>
</tr>
<tr>
<td>Active campaigns</td>
<td>149</td>
</tr>
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<td>CAMPAIGN EVENTS</td>
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</table>
Introduction

Tripolis Campaign management is the solution for creating, executing and analyzing campaigns. It allows to graphically design interactive communication scenarios over different communication channels. (SMS, Email and Print)

Key features and benefits

- Simple graphical user interface for cross-channel campaigns (drag/drop)
- Easy segmentation and targeting
- Content personalized messaging per channel
- Update fields
- Automated FTP import/export for Excel and CSV
- Advanced scheduling options
**Campaigns dashboard**

The campaigns dashboard gives an overview of the active campaigns, the campaigns that are about to end and the campaigns in which an error has occurred.

<table>
<thead>
<tr>
<th>Active campaigns</th>
<th>Campaigns about to end</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Active campaigns" /></td>
<td><img src="image2" alt="Campaigns about to end" /></td>
</tr>
</tbody>
</table>

**Active campaigns**

Campaigns that are currently active are shown here. When clicking on one of the active campaign's label you will see the quick links 'view campaign' and 'view log', they will redirect you directly to the campaign editor or campaign log viewer for this campaign.

**Campaigns about to end**

Shows the campaigns per time period that are about to end. Clicking on a time interval for example 'This month' will open a list of campaign that are about to end within a month and the number of days till ending time is displayed. Clicking on a campaign shown in the list will redirect you to the campaign editor for that campaign.

<table>
<thead>
<tr>
<th>Campaigns about to end</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image3" alt="Campaigns about to end" /></td>
</tr>
</tbody>
</table>

**Campaigns with errors**

Shows the active campaigns in which an error has occurred. Clicking on a list entry will take you to the campaign log viewer for that campaign.
**Campaign Events**

The campaign manager is *event-driven*. This means predefined processes or part of these processes will automatically start when a certain events happens in the system.

The campaign manager has got the following type of events.

- **Timed-events**
- **Database-events**
- **Step-events**
- **Online-events**
- **Manual events.**

A **timed-event** is an event with a timer of calendar. E.g. ‘every Monday at 10:00’ but also daily every 2 hours, but not in the weekend’. A timed-event could also be a paused-step. E.g. Send a mail and wait for 2 days to send a reminder.

A **database-event** will be used for automated changes to the database. E.g. details of a contact changed, such as a new address. Also the is this type event applicable when a new person will be added to the database. This makes it possible to send new contact automatically a welcome e-mail, SMS or confirmation of an order.

A **step-event** will be used when a step within a campaign flow should be triggered when the previous step has finished. This makes it possible to execute multiple steps with a campaign. Flows can be sorted by the use of filters.

**Online-events** are attached to sending e-mails. Tripolis Dialogue contains a *mail receipt, read and click* monitor. In case of a bounced mail address an e-mail could be send to another known e-mail address.

**Manual-events** are sometimes useful to start certain events manually. E.g. before a big export will start a user should first give approval.

Before you can use the campaign manager you first need to create a database and a workspace. You also need to configure a FTP Account. See by the Setup module, on Application, how to configure a FTP Account.
**New Campaign**

**Steps**

1. In the Campaign module click **New**.
2. Enter a **label**.
3. Enter a **Description**.
4. Click **Save**.

The campaign manager starts in design view.

You are now able to create your campaign.
**Design Grid**

The grid allows you to easily design your campaign. Campaign actions are being dropped in the grid, actions are configured and connected to each other.

Every action has a *Timing element*. With a timing element you are able to define when a specific action should be executed.

Every action has also **action-specific settings** which should be configured. Actions are connected as follow-up actions and can represent conditions or events. In the example below will be responded to Bounce and Open events.
**Campaign Actions:**

- **Get group**: Select a group of contacts to start in the campaign.
- **Import**: Add contacts to a campaign group from an import file (csv via ftp).
- **Email**: Send a newsletter or direct email.
- **Notification**: Will send a notification email after a certain campaign action.
- **SMS**: Send a SMS message.
- **To group**: Add contacts to a static group.
- **Export**: Export the selected contacts to a CSV file.
- **Update fields**: Update contact details.
- **Timer**: Set time and date when actions should be triggered.
- **End**: End a campaign.
- **Connect modus**: Connect several actions.
Campaign action settings: Time

When dragging an action to the campaign grid, settings will be displayed. Settings are divided in 2 tabs, Operation and Time.

Time settings are for all actions the same.

Steps
1. Enter a description.
2. Configure time: Manual, Fixed date or On Completion of previous campaign action.
3. Configure the time frequency if required.
   You’ll have the following options.
   - Once
   - After x minutes.
   - Every x day of the week on a certain time.
   - Every x day of the month on a certain time.
   - Every x minutes.
   - Via a Cron Expression
**Campaign action settings: Operation tabs**

Get Group

- Select via the dropdown menu the group name.
- Select via the 2nd dropdown menu the test group.

When you start the campaign in Test mode, by default the test Group will be selected.

Import

- Select via the dropdown menu a FTP account.
- Enter the name of the import file.
- Set the file format. CSV or XLS.
- Select the required Import mode.
- Tick error notification if you would like to save a file with erroneous contacts on the server.
- Enter an Email address for messages and notifications.
Email

- Select the type; Newsletter or Direct Email.
- Select via the dropdown menu the required Newsletter or Direct Email type.
- Select via the dropdown menu the newsletter issue.
- Set the number of maximum mails per hour.

When there are a lot of links directing to your website and you expect a lot of clicks you might want to consider a low number of emails send per hour to avoid overloading the web server.

Notification

- Enter an e-mail address to send the notification to.
- Via add you can enter multiple e-mail addresses.
- Enter a subject and message
SMS

- Select via the dropdown menu the type SMS.
- Select via the dropdown menu the SMS message.

<table>
<thead>
<tr>
<th>Operation</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sms Type</td>
<td>prive mobiel</td>
</tr>
<tr>
<td>Sms Message</td>
<td>actie sms</td>
</tr>
</tbody>
</table>

To Group

- Select via the dropdown menu de Group name.
- Select via the dropdown menu the test group.

When you start the campaign in Test mode, by default the test Group will be selected.

<table>
<thead>
<tr>
<th>Operation</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group name</td>
<td>after</td>
</tr>
<tr>
<td>Test group name</td>
<td>testgroep</td>
</tr>
</tbody>
</table>

Update Fields

- Select via the dropdown menu a database field to update.
- In case of date or time; select in the 2nd dropdown menu a + or - value.
- Enter a value to update database fields.
- Click Add Row to add an extra update field value.

<table>
<thead>
<tr>
<th>Operation</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Veld</td>
<td>Waarde</td>
</tr>
<tr>
<td>&lt;empty&gt;</td>
<td></td>
</tr>
</tbody>
</table>
**Export**

- Select via the dropdown menu the export.
- Select via the 2nd dropdown menu a **FTP account**.
- Enter the file name and select if required **add time stamp** (date / time) to the export file.
- Select **rename or overwrite**.
- Select the **export format**. CSV or XLS.
- Select the **Contact fields** you wish to export.
- Click **Add** to add a 2nd e-mail address whenever required.
Campaign actions on the design grid

Steps
1. Drag with the left Mouse a campaign action to the grid.
2. Configure the campaign action setting (Operation en Time)
3. Click OK.

If required you can drag the campaign action to any position on the grid.

4. Select the next campaign action to create your campaign.
**Connect campaign actions**

Campaign actions are connected to each other by arrows (connectors). These connectors can represent events or conditions.

**Steps**

1. Click the connector symbol.

2. Connect the different campaign actions by holding the ALT key and the left mouse key.

3. Double click on a connector to add conditions.

4. Set the **priority**.

When a campaign action flows into multiple actions, the priority sets the order of the flow. The highest a priority will be First executed.

5. **Filter** Depending on the type of campaign, the following filters are applicable.

**After email action**
After SMS action

<table>
<thead>
<tr>
<th>Priority</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Filter</td>
</tr>
<tr>
<td></td>
<td>On Expire</td>
</tr>
<tr>
<td></td>
<td>On Sms Status</td>
</tr>
</tbody>
</table>

After all other actions

<table>
<thead>
<tr>
<th>Priority</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Filter</td>
</tr>
<tr>
<td></td>
<td>On Expire</td>
</tr>
</tbody>
</table>
Campaign functions

- **Properties**: Displays the properties of a Campaign definition.
- **Log**: Overview of the executed campaign steps including the result.
- **Trigger Log**: Overview of errors during the execution of a campaign.
- **Test Runs**: Displays Test Jobs of a Campaign.
- **Copy**: Copies the campaign Definition.
- **Print**: Prints the Campaign definition.
- **Save**: Saves the Campaign.
- **Test**: Creates a Test Job for the campaign.
- **Activate**: Creates a campaign job to be executed.
- **Full screen**: On /Off.
Before you activate a campaign, it is advised to test the campaign. When you run a test, by default the selected test Group will be used.

**Steps**

1. Click **Test**. 
   Activating a test can take some time.

2. Click **Start**. 
   The campaign test will be executed.

When the test is executed the campaign grid displays the total contacts who passed through the campaign. In the example below this is 1 contact in the test group.

Click **Show Test** to display or hide the test.
Click **Log** to display an overview of the test steps per ‘state’ (campaign action). The log file list what happened when, in which stage and the result of the passing the steps.
Activate a Campaign

Steps
1. Click Activate.
2. Enter a campaign title.
3. If required enter a campaign description.
4. Select date and time to start the campaign.
5. Select date and time to end the campaign.
6. Click Finish.

The campaign is activated. Modifications are not possible, unless you deactivate.

Click Execute to execute the campaign.

Via Trigger Log an overview is displayed of possible errors while executing a campaign.
Deactivate a Campaign

Once a campaign is activated there are no modifications possible. You need to deactivate a campaign before you can make any modifications.

Select the required campaign or campaign test and click **Deactivate**.

Deactivating a campaign can take some time.

Delete a Campaign

Before you are able to delete a campaign or test you need to deactivate the campaign.

Select the **campaign** and click delete.

When a campaign has several campaigns (test and activated campaigns) and you want to delete one of these campaign, click **campaign definitions** first. Tick the required campaign and click **delete**.

Copy Campaign

Click **Campaign definitions** to display all of your campaigns. Select the required campaign and click **Copy**.
Enter a new label and description and click **Save**.

The campaign is copied. Double click on the copied campaign to open the campaign design grid and make any required modifications to the campaign.

### Overview active & inactive campaigns

A list of campaigns for each campaign definition is available. This way it is possible to see on one page the details of all campaign runs.

**Steps**

1. Click in the campaign module on the required campaign.
2. Click list campaigns.
3. The list will be generated.
4. Select one or more Campaigns to delete, or
5. Select a campaign to edit.
Usage / Implementations

Below you’ll find some campaign implementations. The functionality of the campaign module is explained in the chapters above.

Export Contacts, Mail blacklists, Bounces, Clicks or Opens

A FTP account is required for import/export of contacts. The FTP account needs to have as well an import as an export folder.

Steps

1. Add a get group campaign action to the grid.
2. Define the group name and test group.
3. Configure the time tab.

4. Add an Export campaign action to the grid.
5. Configure the Operation tab.
6. Configure the Time tab.
7. Add an End action to the grid.
8. Connect the different actions.

9. Click Test to activate a campaign test.

10. Click Play to run the test.

11. Activate the campaign when ready to launch.

After completion of the campaign you will receive an e-mail confirmation.

```
------- Campaign Info -------
Name of campaign used for import: run 1
Node name: export

Exported 13212 Contacts.
```
Import Contacts

A FTP account is required for import/export of contacts.
The FTP account needs to have as well an import as an export folder.

Steps

1. Add an **Import** campaign action to the grid.
2. Configure the operation tab.
3. Configure the time tab.

4. Add a **to group** to the grid.
5. Configure the operation tab.
6. Configure the time tab.
7. Add an **End** action to the design grid.

8. Connect the different campaign actions.

9. Click **Test** to activate a campaign test.

10. Click **Play** to run the test.

11. Activate the campaign when ready to launch.

After completion of the campaign you will receive an e-mail confirmation.

```
------- Campaign Info -------
Name of campaign used for import: Test_Campaign_714 Mode name: import

The import of file tmpimp12135122378801833.xls has finished.
Import Statistics for [btoonen@tripolis.com 2005-07-05 10:17:16]
  Added to group  : 24
  removed from group : 0
Import time 00:00:00
Import Errors
Total number of import errors: 0
```
**Clicks Campaign**

**Steps**
1. Add a **get group** action to the grid.
2. Configure the Operation tab.
3. Configure the Time tab.
4. Add an **email** campaign action to the design grid.
5. Configure the Operation tab.
6. Configure the Time tab.
7. Add a follow up action (e.g. SMS) to the grid.
8. Add an **End** action on the grid.
9. Connect the different campaign actions.
10. Double click on the connector between Email and SMS.
11. Set the priority and filter to **Click**.
12. Select the links which should have a follow up action. (sending SMS)
13. Click **Test** to activate a campaign test.
14. Click **Play** to run the test.
15. Activate the campaign when ready to launch.

Optional you are able to add a timer action to the grid. In the example “check clicks every 10 minutes”
Multiple step Campaign

Step 1
Customers who signed on for a temp subscription will have the start date of the subscription assigned, by updating field values in the database. Via the campaign manager a CSV file with new subscribers are added to the database.

Via smartgroup settings are new subscribers added to the subscriber smartgroup.
**Steps**

1. Add an **Import** campaign action to the design grid.
2. Configure the Operation tab.
3. Configure the Time tab on completion.

![Import Campaign Action](image)

4. Add an **Update fields** campaign action to the grid.
5. Configure the operation tab.
6. Configure the time tab on completion.

![Operation Tab](image)

7. Add an **End** action on the grid.
8. Connect the different actions with each other.

**Step 1**

1. **Import CSV file from FTP**
2. **Tripos Academy (CSV)**
3. **Once**

4. **Start date**
5. **Start date**
6. **End**

![Action Diagram](image)
Step 2
Customer who subscribed need to receive a confirmation per e-mail.
In the previous step these customers are added to the database and added to a smartgroup. This smartgroup will be used as the get group. Bouncers will be exported.

Steps
1. Add a get group action to the design grid.
2. Define get group and test group.
3. Configure the Time tab.

**Steps**

1. Add a get group action to the design grid.
2. Define get group and test group.
3. Configure the Time tab.

<table>
<thead>
<tr>
<th>Operation</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group name</td>
<td>abo's en proefabo's</td>
</tr>
<tr>
<td>Test group name</td>
<td>test</td>
</tr>
<tr>
<td>Test group is used instead of a real group when campaign runs in the test mode.</td>
<td></td>
</tr>
</tbody>
</table>

4. Add an email action to the design grid.
5. Configure the Operation tab.
6. Configure the Time tab on completion.

**Time:**

- Every Mon, Tue, Wed, Thu, Fri
- day of the week: At: 09:00

<table>
<thead>
<tr>
<th>Operation</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td>Newsletter</td>
</tr>
<tr>
<td>Direct Mail Type:</td>
<td>bevestigingsmails</td>
</tr>
<tr>
<td>Issue:</td>
<td>daily RSS newsletter</td>
</tr>
<tr>
<td>Max. mails per hour:</td>
<td>50000</td>
</tr>
</tbody>
</table>

7. Add an Export action to the design grid.
8. Configure the Operation tab.
9. Configure the Time tab.
Time:

10. Add an **End** action to the grid.
11. Connect the different actions with each other.

**Step 2**
Subscriber will receive a welcome e-mail on the day the subscription starts. 2 hours after this e-mail a welcome SMS need to be send. Bouncers also receive a SMS with a new sign up procedure. Database field values from the bouncers should be updated with Subscriber = No and end date = Today

Export the bouncers to the FTP account.

**Steps**
1. Add a **to group** action to the design grid.
2. Define the **get group** and the test group.
3. Configure the time tab.

<table>
<thead>
<tr>
<th>Operation</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group name</td>
<td>start_proef (vandaag)</td>
</tr>
<tr>
<td>Test group name</td>
<td>test</td>
</tr>
</tbody>
</table>

Test group is used instead of a real group when campaign runs in the test mode.
Tripolis Solutions Dialogue Manual

Time:

4. Add an e-mail action to the grid.
5. Configure the Operation tab.
6. Configure the Time tab.
7. Add a Time action to the grid.

8. Configure the Time action.
9. Add a SMS action to the grid.
10. Configure the Operation tab.

11. Configure the Time tab on completion.
12. Add a 2nd SMS action to the grid.
13. Configure the Operation tab.
14. Configure the Time tab on completion.
15. Add an Update fields action to the grid.
16. Configure the Operation tab.
17. Configure the Time tab on completion.
18. Add an **Export** action to the design grid.

19. Configure the **Operation** tab.

20. Configure the **Time** tab.

21. Add an **End** action to the grid.

22. Connect the different actions with each other.

23. Double click on the connector between timer and welcome SMS.
   - Select **filter** via het dropdown menu.
   - Define the filter fields.

   (in this case all subscribers without end date temp subscription.

   ![Filter screenshot](image)

24. Double click on the connector between timer en bounce sms.
   - Select **filter** via het dropdown menu.
   - Define the filter fields.
     * (In this case **on bounce**)
   - Select via the dropdown menu the required e-mail.

   ![Filter screenshot](image)
Step 3

1. 2 & 3
   - get new
     - start proef (vandaag)
   - Every ma, di, wo, do, vr at 08:00

4. 5 & 6
   - send welkomst email @8:00
     - Welkomst mail(80292)
   - Once

7 & 8
   - timer
   - After 2 Uren

9. 10 &

11. 12, 13 &

15. 16 &
      - send welkomst sms
      - eerste dag notificatie(80291)
      - Once

18. 19 &

22 & 23

24

- export bounces to FTP
  - Bas Export (CSV)
  - Once

- update fields, set proefabo...
  - abonnee = false; datum eind ...
  - Once

- send bounced sms
  - email gebounced(80293)
  - Once
Step 4
After expiration of the temp subscription a mail is being send if the subscriber wants to
Update the temp subscription to a normal subscription.

If yes, database fields should be updated with end date temp subscription = yes and Normal
subscription = yes.
The ‘new’ subscribers receive as well a welcome SMS.

If not, database fields should be updated with end date temp subscription = yes and Normal
subscription = no.

If temp subscribers don’t respond to the mail, database fields should be updated with end date temp
subscription = yes and Normal subscription = no.

Steps
1. Add a to group action to the grid.
2. Configure the operation tab.

3. Add an Email action to the design grid.
4. Configure the Operation tab.
5. Configure the Time tab on completion.
6. Add an **Update fields** action to the design grid.
7. Configure the Operation tab.
8. Configure the Time tab *on completion*.

![Operation and Time settings](image)

9. Add a **SMS** action to the design grid.
10. Configure the Operation tab.
11. Configure the Time tab *on completion*.

![Operation and Time settings](image)

12. Add another **Update fields** action to the grid.
13. Configure the Operation tab.
14. Configure the Time tab *on completion*.

![Operation and Time settings](image)
15. Add one more **Update fields** action to the design grid.
16. Configure the Operation tab.
17. Configure the Time tab on completion.

![Design grid screenshot]

18. Add **End** actions to the design grid.
19. Add a **Timer** action to the grid between e-mail action and the 3 **Update fields** actions.
20. Connect the different actions with each other.
21. Double click on the connector between **timer** and **Update field 1**
   - Select **click** via the dropdown menu.
   - Select the links for a follow up action. In this case subscription = yes
22. Double click on the connector between **timer** and **Update field 2**
   - Select **click** via the dropdown menu.
   - Select the links for a follow up action. In this case subscription = no
23. Double click on the connector between **timer** and **Update field 3**
   - Select **click** via the dropdown menu.
   - Select the links for follow up action. In this case subscription expired = no
Example step 4

1, 2 & 3

4, 5 & 6

7, 8 & 9

10, 11 &

13, 14 &

16, 17 &

18, 19 &

Send welcome email

Send welcome SMS

End