



## **Email Marketing Manager (EMM) Training Guide**

Provided in conjunction with

***WhatCounts***™ The logo for WhatCounts, featuring the word "WhatCounts" in a bold, italicized, white sans-serif font. To the right of the text is a small icon of a person carrying a large white envelope. The entire logo is set against a dark gray rectangular background.

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# Welcome

The WhatCounts email publishing platform enables the rapid creation, deployment and measurement of personalized, targeted email. WhatCounts is a web-based platform and was designed for ease of learning and use.

This document was created to help train you in using the WhatCounts system. It's broken down into the following sections:

<b>Feature Overview</b>	In this section you will be provided with an overview of the platform's features and capabilities.
<b>Lists</b>	In this section you'll learn how to create and maintain lists of subscribers.
<b>Content</b>	Templates enable flexible content management and in this section you'll learn how to create, edit, and use them.
<b>Subscribers</b>	Although you'll learn a little bit about them in the "Lists" section, here you'll learn how to import subscribers into the system, edit subscriber records, and even examine events associated with subscribers. You'll also learn how to export subscribers out of the system.
<b>Running and Testing Lists</b>	This section was designed to help you learn how to thoroughly test and launch your first campaign using WhatCounts.
<b>Advanced Features</b>	Advanced features of the product include the ability to track open rates and click-through activity, create custom fields for your subscribers, segment your lists based upon special conditions you specify, and schedule the deployment of campaigns automatically.

Throughout this guide you'll find step-by-step instructions designed to teach you specific features of the WhatCounts platform.

An additional training program is available to cover even more advanced topics, including:

- Special form creation and integration
- The "display message" feature
- Administrative functions
- DNS issues and bounce management
- Private labeling setup

See your WhatCounts account representative for more information about setting up a training session for these advanced topics.

# Feature Overview

The WhatCounts platform was designed to make creating and sending personalized and highly targeted email extremely easy. It was designed to eliminate the need for your organization to maintain a specialized database of email recipients or have to worry about all the various nuances related to sending email. With WhatCounts, you and your organization can:

<ul style="list-style-type: none"><li>▪ Send HTML email</li><li>▪ Enable format “sniffing” so you can automatically determine which of your recipients can receive HTML email</li><li>▪ Send special content to AOL users</li><li>▪ Easily create subscription forms using a special HTML wizard</li><li>▪ Create forms to capture standard or custom information that can be stored in subscriber records.</li><li>▪ Create custom fields to store specialized information with all your recipients</li><li>▪ Automatically remove “opt-outs” from your list.</li></ul>	<ul style="list-style-type: none"><li>▪ Create confirmed (double) opt-in/out lists</li><li>▪ Segment your list based upon specific criteria</li><li>▪ Create and manage templates for your content</li><li>▪ Manage articles that can be used in multiple templates</li><li>▪ Easily include content from external data sources</li><li>▪ Create and manage polls</li><li>▪ Schedule publishing tasks to occur at future times – even setting some to recur at regular intervals</li><li>▪ Track click-through activity and open rates in real-time</li></ul>
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## *Integration*

It's easy to integrate WhatCounts into your company's web site and for it to use content created by external publishing tools. This training guide will explore how subscription forms are generated and how templates can pull content from external locations.

## *Performance*

The WhatCounts platform is can send millions of unique messages per day and is capable of even higher performance thanks to an architecture which supports rapid scaling.

## *Adherence to Standards*

The WhatCounts platform adheres to well-known email standards and all messages that are generated by the system contain valid SMTP mail headers.

# Lists

Lists are a foundational element of the WhatCounts platform. They're basically collections of one or more subscribers. Suppose your company maintained a list of all its customers and wanted to send them email. With the WhatCounts platform you would create a list called "Customers" and associate the email addresses of all your customers (or subscribers) to this list.

This section will address lists – how to create, edit them, and setup all of the information needed so your email messages are delivered properly.

All of the features discussed in this section can be reached through the Lists dropdown section of the interface. To reach this section, rest your cursor over the word LISTS on the toolbar or click on QUICK GUIDE.

## Creating Lists

List creation and editing is performed through a simple tabbed interface. To create a new list, select the *Create New List* item in the "Lists" drop-down menu (see below). To edit an existing list, select LISTS>VIEW LISTS then select a list name.



Figure 1: Creating a New List

## Name and Addressing

This screen allows you to specify the addresses, template, and description you want associated with the list. Since the topic of templates hasn't been covered yet you can ignore this part of the screen. Note, however, that when you update the information on this screen you'll be warned about not having a template associated with your list. This warning can be safely ignored at this point.

The screenshot shows a web browser window titled "WhatCounts: List Management - Microsoft Internet Explorer". The page header includes the "WhatCounts" logo and navigation links for "solutions", "clients", and "log out". A secondary navigation bar contains "Quick Guide", "Lists", "Content", "Subscribers", "Segmentation", "Research", and "Customer Center". The main content area is titled "Edit List" and features a tabbed interface with "Name and Addressing" selected. The form fields are as follows:

Name:	Daily News
Template:	Daily News
From address:	"Mary Richards" <mrichards@wjv-tv.com>
Reply-To address:	"Mary Richards" <mrichards@wjv-tv.com>
Bounce address:	wjv??EMAIL_REF??@response.whatcounts.com
Description:	Daily news, emailed each morning at 5am.
Admin E-mail:	admin@wjv-tv.com

At the bottom of the form are three buttons: "Delete", "Update", and "Cancel".

Figure 2: The Name and Addressing Tab of Edit List

<b>Name</b>	Give your list a name that will make it easy to identify according to use. For a list of customers you might name it "Customers."
<b>Template</b>	Templates hold the content of your email messages. This drop-down allows you to associate one with your list.
<b>From address</b>	<p>How do you want your messages to appear to your recipients? The "from" address determines what they'll see in their inboxes.</p> <p>WhatCounts supports a format which allows you to specify a decorative (display) version as well as the actual email address.</p> <p>If you want your customers to see your messages appearing to come from "WJM-TV" you might enter a value similar to:</p> <p style="text-align: center;">"WJM-TV" &lt;info@wjm-tv.com&gt;</p> <p>Note: The display version must be in quotes with the actual email address enclosed in angle brackets.</p>
<b>Reply-To address</b>	This field works exactly like the "from" address field. Its use was designed to allow you to specify where messages will go should your recipients (or their mail servers) decide to reply.
<b>Bounce address</b>	When the topic of bounce management is covered you'll learn how special tags can be inserted into this field to automate the processing of email that can't be delivered
<b>Description</b>	Just like the "name" field, the description allows you to identify the purpose of the list. This is an optional field, but is useful if you have multiple people in your organization using WhatCounts.
<b>Admin Email</b>	<p>Is there someone in your organization responsible for administering your email systems and software? If so, use this optional field to specify their address. If there are problems associated with running your list they'll be notified.</p> <p>The "Admin Email" is also used as the "from" address for cancellation and subscription request completion notices sent to subscribers.</p>

## Formatting

This tab allows you to activate format “sniffing,” select whether AOL recipients will receive special content, and enable wrapping for your content.

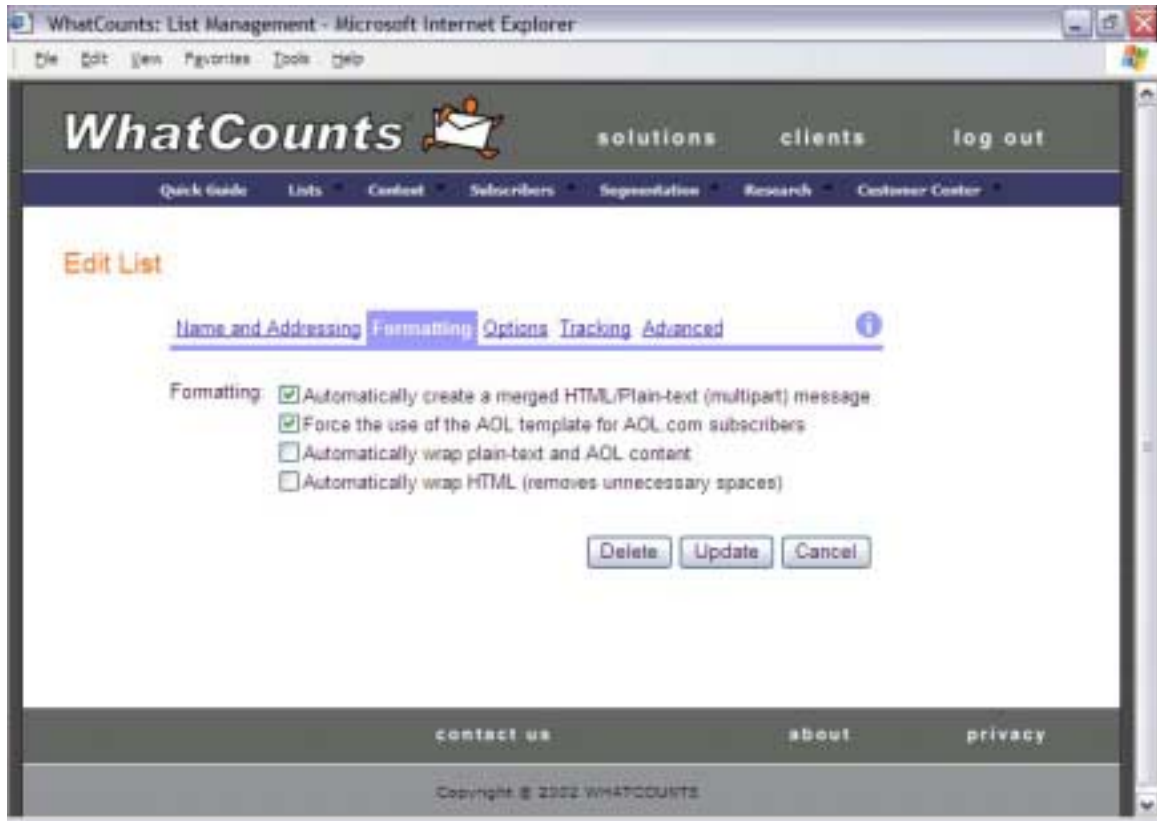


Figure 3: The Formatting Tab of the List Editor

<p><b>Automatically create a merged HTML/Plain-text (multipart) message</b></p>	<p>Multipart messages contain both plain text and HTML. They're useful to send when you're not sure the recipient's mail client can display HTML. If HTML cannot be displayed, the plain text content you prepared will appear instead. Your recipients will only receive one email.</p> <p>Use of this feature automatically enables a "sniffing" capability which will report back how many of your recipients email clients were able to display HTML.</p>
<p><b>Force the use of the AOL template for AOL.com subscribers</b></p>	<p>There's a good chance that many of your intended recipients have AOL accounts. Unfortunately, with so many different versions of AOL it's hard to know what type of content to send to them.</p> <p>Enabling this feature tells WhatCounts to deliver special AOL content to all AOL.com subscribers on your list.</p> <p><i>If you haven't prepared special AOL content then your plain-text content will be used automatically.</i></p>
<p><b>Automatically wrap plain-text and AOL content</b></p>	<p>Plain-text email can look awkward if the lines within the message don't have breaks in them.</p> <p>Enabling this feature tells WhatCounts to automatically wrap your plain text content at approximately the 65 character length.</p> <p><i>Wrapping only takes place on word boundaries.</i></p>
<p><b>Automatically wrap HTML (removes unnecessary spaces)</b></p>	<p>Enabling this feature tells WhatCounts to wrap HTML content. Although you won't be able to visually detect any difference, the size of your email message may become smaller thanks to wrapping. Very often HTML contains lots of extraneous information, including excess spaces, tabs and blank lines.</p> <p>The wrap HTML feature attempts to remove this extra information without effecting how the content is viewed.</p>

## Options

WhatCounts makes operating confirmed (double) opt-in lists easy and the options tab lets you specify whether your list will require subscribers to confirm their sign-ups and cancellations. This is also the place where you'll specify landing pages for when people run your sign-up forms. Creating these forms will be discussed later in this document.



Figure 4: The Options Tab in Edit List

<b>Subscription Options</b>	
<b>Require list sign-ups to be confirmed</b>	A double opt-in list is one in which a positive confirmation is required before subscribers can join your list. Enabling this all but guarantees that the email addresses assigned to your list will be legitimate.  Double opt-in lists are also a sign of permission oriented email. They remove most of the obstacles facing email publishers when challenged with proving they're not spamming people with unwanted email.
<b>Require list cancel requests to be confirmed</b>	Similar to confirming sign-ups, you have the option of requesting users to confirm their intentions to cancel their subscription to your list.

<b>Confirmation Email</b>	
<b>Send for new sign-up using template</b>	<p>After someone confirms their intention to join a list, you can have a mail message automatically sent to them. It's an opportunity for you to send them a "thank you" message or present an "up-sell" opportunity. If you're publishing a series of content pieces it might be where you send them their first installment.</p> <p>To send your own content, select one of your templates from the drop-down list.</p> <p>If you don't have special content prepared but want to send subscribers a confirmation of joining your list, you can have the WhatCounts platform automatically generate a "thank you" message by selecting "auto generated" from the drop-down.</p>
<b>Send after cancellation using template</b>	<p>This feature behaves just like the previous one, but is triggered when subscribers leave your list. This is a perfect opportunity for you to communicate one last time with your recipients. It might even be a chance for you to push one additional "up-sell" opportunity in front of them or attempt to have them sign-up again.</p>
<b>External Links</b>	
<b>After pressing a sign-up link</b>	<p>When subscribers fill out subscriptions forms that add them to your list, you can specify a web page where they'll be directed after submitting their information. This is called a landing page. Enter a fully qualified URL of the page where you'd like users to be sent. If you leave this field blank, WhatCounts will generate a message for you automatically.</p>
<b>After pressing a cancel link</b>	<p>This behaves just like the previous field, but is designed to direct users to a landing page after they've cancelled their subscription. Enter a fully qualified URL of the page where you'd like users sent.</p>

## Tracking

Tracking is important because it gives you the chance to see how your list is performing. Are you interested in knowing how many people are opening your HTML messages, or what links within your messages are being clicked on? If so, you'll want to enable these tracking features.



Figure 5: Tracking Options for Lists

<b>Track when HTML readers open email</b>	<p>This checkbox inserts a special tracking tag into your HTML content. The number of people opening your message can then be recorded.</p> <p><i>Note: Outlook's preview pane will cause the tracking tag to be activated just as it would if the message were actually opened.</i></p>
<b>Track click-throughs</b>	<p>This checkbox tells WhatCounts to replace all links within your content with special WhatCounts links. These links allow us to track the number of times each link in your email is selected. All links go to servers at WhatCounts where the information is recorded. Users are then redirected to the locations you originally intended them to visit. This process is invisible to users.</p>

## Advanced

Advanced list features are discussed here because you'll inevitably be exposed to this part of the platform's interface. However, these features shouldn't be used until you're extremely familiar with the platform and understand all of the features related to tracking, scheduled publishing, custom fields, and campaigns. Their use is explored in the advanced training program offered by WhatCounts.

<b>Base URL</b>	<p>When your list is sent with tracking enabled, all links are replaced with ones that carry the whatcounts.com domain name. Since links are hidden in HTML, the only time the WhatCounts domain would be readily visible to users would be in plain text.</p> <p>Your organization can setup a DNS host alias to the WhatCounts tracking system (tracking.whatcounts.com). When that is complete, specify your aliased domain in this field. Doing so enables all the links in your messages to carry your company's domain-name branding.</p> <p><b>Note: If you don't have an alias set up to point to tracking.whatcounts.com, don't use this feature.</b></p>
<b>Forward-to-a-Friend: (FTAF)</b>	<p>Customize the FTAF feature to match the "look and feel" of your email. Create html pages for any or all of the following aspects of FTAF, and then enter the URL of those pages here.</p> <ul style="list-style-type: none"><li>▪ <b>Custom form:</b> Create a custom form where users enter information for FTAF like a friend's name, email address, and message.</li><li>▪ <b>Envelope:</b> This will appear at the top of the email that is forwarded. Customize the color, font, or even add a box to allow the friend to subscribe to your list.</li><li>▪ <b>Landing page:</b> A custom "thank you" page where users will be directed after they have forwarded your email to a friend.</li><li>▪ <b>Error landing page:</b> Users will be directed to this page if there is a problem with how they have filled out the form.</li></ul>
<b>Workflow</b>	<p>If the "Approval is required before sending" box is checked, one individual on the given list must approve the email before it is sent out. This feature is beneficial when content is being pulled from an outside source and needs to have a final approval before it is sent to an entire list.</p>

<b>Sticky Campaigns: Publish using the same (initial) campaign</b>	Every time your list is run, a campaign is created and tracking information is associated with that newly created campaign. If you want to keep tracking information related to your list activity using one campaign, mark this checkbox. This feature is useful for lists that publish the same content regularly using a schedule.
<b>Set Data</b>	Use these fields to set or increment a numeric value associated with each subscriber sent email when this list is run. The drop-down list of custom fields will only show numeric fields.

### Creating HTML Sign-up Forms

Now that you have a list set up, how do you get subscribers into it? Importing is one approach. Another is to have a subscription form your potential recipients will fill out using their web browser.

WhatCounts has an HTML wizard that will create a subscription form for your list automatically. Select “Create Forms (HTML Wizard)” from the *Lists* drop-down, select the name of the list for which you’d like to generate a form, and then click on the *HTML Wizard* button.



Figure 6: Creating Forms using the HTML Wizard

To create a subscription form, select *Subscription Form* from the *Generate* drop-down.

If you'd like your recipients to receive your content in HTML select the radio button labeled *HTML*. If you'd like to give them a choice between plain-text and HTML, mark the checkbox labeled *Show Plain-text and HTML choices*.

After a user submits their information you can have them directed to a landing page of your choice by entering a URL (including http://) in the "Goto URL" text box. This value overrides the one set on the Options tab in Edit List.

After you press the "Continue" button you'll be shown a screen containing the HTML that represents your new subscription form.

Here's how you can test your new form:

- Create a new file with an \*.html extension, or copy the code into an existing HTML document.
- Open the page containing the form HTML in your browser.
- Fill out the form. When you click SUBSCRIBE, you will be redirected to the page you entered in Goto URL. (If you did not enter a GoTo URL, you'll be sent to the URL entered on the Options tab of the List Editor, or the default WhatCounts landing page.)
- Visit the View Lists page in WhatCounts. If your list doesn't require confirmations you should see a new subscriber. If the "Require list sign-ups to be confirmed" option was checked in Edit List, look for an email message asking for your confirmation. Once you confirm you should see a new subscriber on your list.

If your list is brand new and you're testing the subscription form created by the wizard, you should see the number or count of subscribers increase as you add new names through the form. The exception to this rule is that if your list requires confirmations, you won't see changes in the number of subscribers until your subscribers-to-be confirm their intentions.

More advanced form techniques can be found in the Online Help library reached through the *Customer Center* tab of WhatCounts.

# Content

While Lists keep track of who'll be receiving your messages, Content keeps track of what will be delivered. WhatCounts has a flexible template system that allows you to create as many different templates as you like. Each one can contain formatting for plain-text, HTML and AOL content.

Creating templates starts in the **CONTENT** drop-down menu, as shown below.



Figure 7: Creating a New Template

## Create New Template

When you select the *Create New Template* item from the *Content* drop-down menu you'll be shown a blank template editing screen. It is here that you can type, paste, or import content.

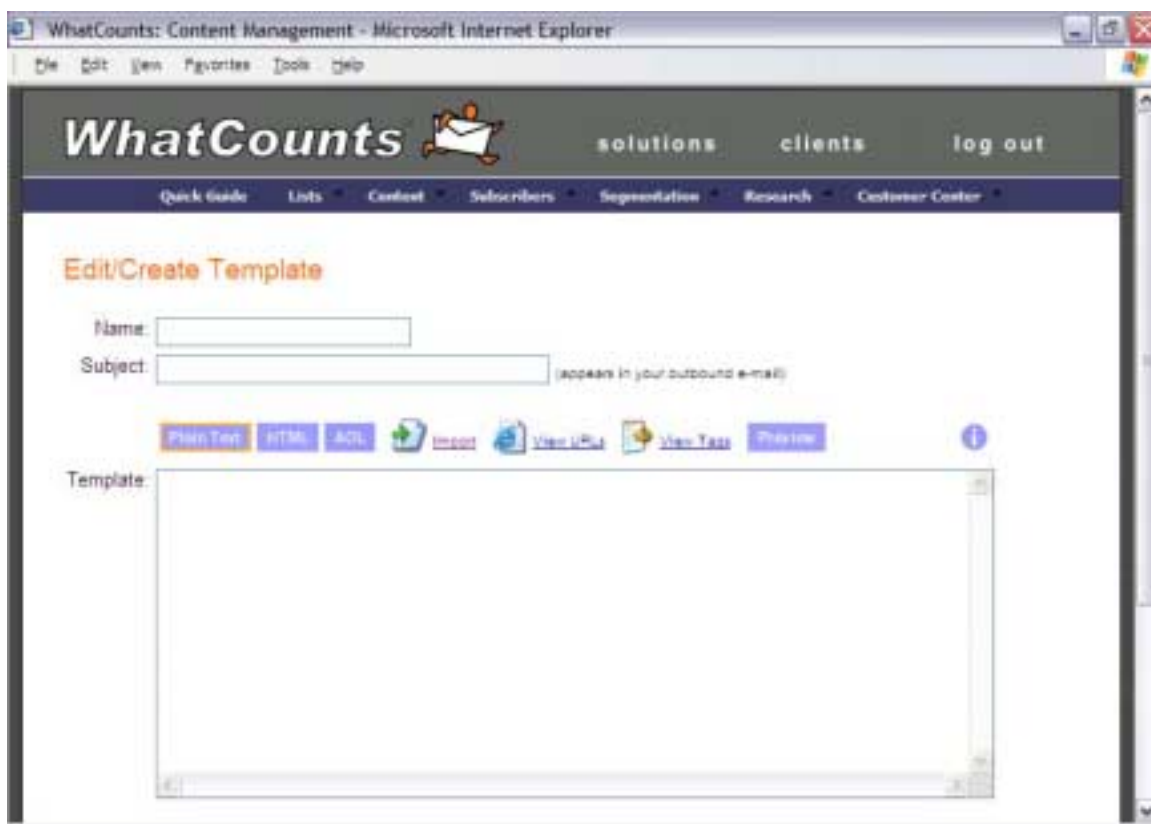


Figure 8: The Edit/Create Template Window

To create a template with both plain text and HTML content follow these steps:

- **Name:** Pick a descriptive name for your template. This will not be seen by email recipients, but it is useful to differentiate one template from another.
- **Subject:** This will appear as the subject of the email message delivered to recipients.
- Move your cursor to the **Template** field and begin typing plain-text content.
- To enter HTML content, press the *HTML* button. That button will now have an outline around it to indicate that it is selected. Enter some HTML content for your message.
- If you would like to enter AOL specific content, select the AOL button. For information about formatting email especially for AOL, visit: <http://postmaster.info.aol.com>
- Press the *Create* button to save your work.

## Importing Content

If you have content you'd like to place into a template automatically, use the Template Import tool reached by selecting *Import* next to the picture of page with a green arrow.

To import content from the web:

- Check the radio button next to the field *URL*
- Enter in a fully qualified URL (i.e. <http://www.whatcounts.com>)
- Select one of the radio buttons under *Import into*. For example, if you're importing HTML, select the radio button for HTML

Relative URLs are shortened and don't contain either full folder or protocol information. (i.e. “../images/wc\_logo\_fp.gif.”) A fully qualified URL contains complete folder and protocol information. (i.e. “[http://www.whatcounts.com/images/wc\\_logo\\_fp.gif](http://www.whatcounts.com/images/wc_logo_fp.gif)”) Fully qualified URLs are necessary to insure that all images are properly displayed in your HTML email.

If relative URLs have been used in your HTML document, select the “fix relative URLs” radio button before selecting **IMPORT**. The WhatCounts import engine will attempt to replace any relative URLs in your document with fully qualified URLs.

To import content from your own computer, follow the same steps as above except make sure the radio button next to the field *File* is marked. Then press the *Browse* button to search for and select your file.

## Previewing Content

To get a preliminary feel for how it will look, use the preview button to view your content in a browser window. First, press the *Create* or *Update* button to save your content. Next, return to the template and press the *Preview* button.

*Note: Although it does give a good approximation, a browser won't behave exactly like an email client. Make sure you thoroughly test your content before deploying any campaign.*

## Reviewing URLs

Detecting your URLs is an important part of WhatCounts' ability to perform real-time click-through tracking. To review the URLs within your content, click on the button labeled *View URLs* next to the tiny picture of a web page.

After doing so you'll see a list of all the URLs that WhatCounts detected in your content. Checkmarks will appear under the columns *Plain*, *HTML* and *AOL* to indicate in which formats of your template the various URLs appear.



Figure 9: Reviewing Your Template's URLs

## Excluding URLs from Tracking

If click-through tracking is enabled, WhatCounts will automatically track all the URLs it encounters in your content. To exclude one or more URLs from tracking you can view your URLs through the template editor and then select them individually.

To exclude a URL:

1. From the Content drop-down, select TEMPLATES then VIEW
2. Select the template you want to use.
3. Select VIEW URLS
4. Click on the URL you would like to exclude.

Once a URL is selected it will be shown on the URL EXCLUDES page (see below). This page will attempt to display to content associated with the specified link. Links that point to pages containing frames won't be displayed.

To exclude the specified URL, click on the link labeled *Exclude this URL* located near the upper right-hand corner of the page. After doing so you'll be returned to the URLs list and your selected URL will show an X mark under the Exclude column. To re-enable the link click on the URL again and press the button labeled *Remove this exclusion*.



Figure 10: Excluding a URL from Tracking

When would you choose to exclude a URL? One case might be if the URL contains personalization information unique to each recipient. For example, a link to an unsubscribe resource managed by your own company. Another reason to exclude tracking for a URL is if you want your link to be displayed as is. For example, <http://www.yourdomain.com> instead of

You can also view the list of excluded URLs by selecting tracking exclusions from the drop-down menu that appears under *Content*.

### **Personalization**

Content inside WhatCounts templates can be personalized using special replacement tags. For example, if you would like to display a subscriber's first name, insert the tag "%\$first%" where you'd like their name to appear.

All tags in WhatCounts start with "\$%" and end in "%". Field names, such as "first" also start with a dollar sign.

## Simple Tags

Here's a list of common tags you can place into your content:

%%\$first%%	Display a recipient's first name
%%\$last%%	Display a recipient's last name
%%\$email%%	Display a recipient's email address
%%\$address%%	Display a recipient's street address
%%\$address_2%%	Display second line of a recipient's address
%%\$city%%	Display a recipient's city
%%\$state%%	Display a recipient's state
%%\$zip%%	Display a recipient's zip code
%%\$phone%%	Display a recipient's telephone number
%%\$fax%%	Display a recipient's fax number

## Special Tags

There are also several special tags you can place into your content:

(Note: The first two tags have no dollar sign and are in all CAPS.)

%%UNSUB_HREF%%	This tag will insert an unsubscribe link individually formatted for each recipient. To use inside of your plain-text content, leave as is. To use within HTML, be sure to place it within an <code>&lt;A HREF&gt;</code> tag.
%%SUBSCRIBER_ID_TAG%%	Displays a unique identifier for this recipient. Used by bounce management.
%%\$builtin.date%%	Displays the current date and time in the format: 01/01/01 10:20  There are other functions that display time and date in various formats based upon the Pacific time zone. For more information about these tags, view context sensitive help by selecting the "i" icon on the Edit/Create Template screen.

## Using Custom Tags

When you learn about custom tags you'll see how they can be inserted into content using the same model shown above.

For example, if you had a custom field with the name "age" you could insert it into your content by placing the tag "`%%$age%%`" anywhere you wanted that information displayed.

## Simple Logic

The WhatCounts template language also supports a simple logic control system. With it you can evaluate your template data. For example, suppose you wanted to print out a message within your content whenever a recipient's state is Washington. You might add the following to your template:

```
%%if state = "WA" then print "Hello to our Washington neighbors."%%
```

You can also include an "else" clause. For example:

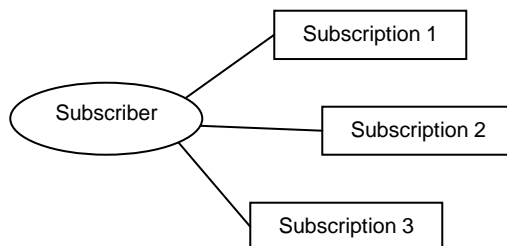
```
%%if state = "WA" then print "Hello Washington neighbor" else print "Hello"%%
```

A more complete description of the template language is available in the advanced use manual.

# Subscribers

Subscribers are individuals who have one or more subscription records associated with them. When people sign-up for your lists, records are created that store their email address, first name and whatever other information they provide to you. In addition to these records, subscription records also get created that associate them with your lists.

The WhatCounts model is very similar to how magazine subscriptions are managed. Suppose you subscribe to several magazines. They each get addressed and arrive at your home. There's one of "you" and one "home" where they get sent to. You and your home address would constitute the subscriber record, and the various magazines you receive would represent your subscriptions.



In the WhatCounts system you can easily import, search for, and export subscriber records. Besides storing things like first and last name, subscriber records can have custom data defined by you associated with them. This is covered in more detail later in the manual.

## Adding and Removing Subscribers

There are several ways to add subscribers to your lists. In the *Lists* section of this training manual you learned about creating a subscription form. In this section you'll learn how to import subscribers into your system from files created by your database or contact management program.

### Subscriber Import Wizard

The WhatCounts Subscriber Import Wizard allows you to import data from a comma-separated-values (CSV) format file. This format is extremely common and easy to create. Fields within each row of these files are enclosed within quotation marks, and individual fields are separated by commas. For example:

```
"Mary", "Richards", "mrichards@wjm-tv.com"
```

might represent an entry for a subscriber named "Mary Richards."

Using the Subscriber Import Wizard is a three-step process. The first step asks you to identify the source of your data. It's typically a CSV file located on your own computer or one on your network.



Figure 11: Importing Subscribers using the Subscriber Import Wizard

There are three options available on the first screen of the Import Wizard. They are:

<b>First record contains field headers</b>	If checked, WhatCounts will recognize that the first row of data in your file contains header fields used only to identify the contents of each column. You'll see these labels in step 2 of the wizard process, but they won't be added to your list.
<b>Ignore if users have already opted-out</b>	If checked, this option tells WhatCounts to ignore subscribers that already exist in the system but don't currently have subscription records to the list you are importing into.
<b>Ok to update subscriber record if it exists</b>	If checked, this options tells WhatCounts to safely overwrite subscriber information (name, address, etc.) if a record already exists.

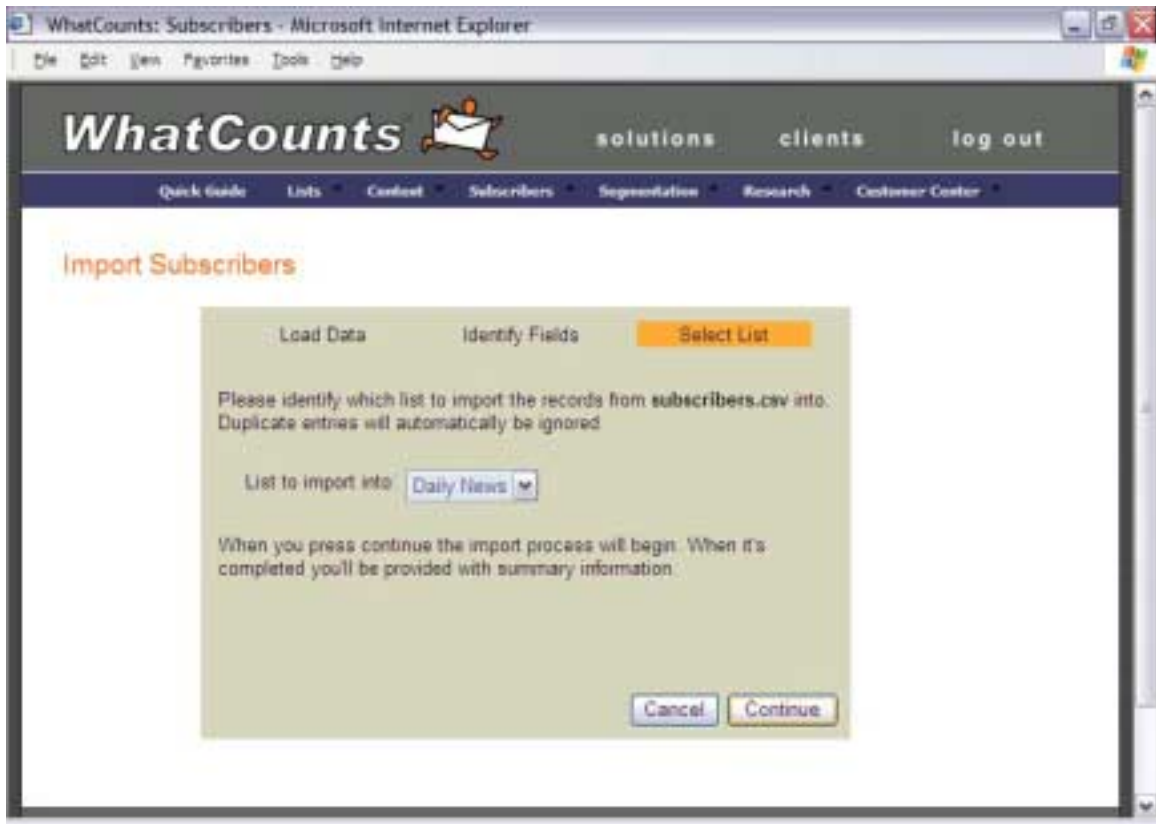
When you click continue, you will proceed to the field-mapping stage. This is where you tell WhatCounts which fields to associate with the data from your file. Your data are stored in rows, each with the same format. So, each column in your file represents one field. In the “Mary Edwards” sample line mentioned previously, the first field represented the subscriber’s first name, the second their last name, and the third and final, their email address.

WhatCounts allows you to arrange your data any way you like – and that’s why the field mapping stage is so important.



**Figure 12: Second Step in the Subscriber Import Wizard - Field Mapping**

The last step in the wizard asks you to identify which list to import your data into. Once you identify the list and select continue, the wizard will run and, you can safely continue on with other work. The import wizard works automatically, in the background. When it's done you'll be sent an email message detailing the process. At any time during the import process you can also check the subscriber counts for your list. You should see the numbers rise steadily as the import process works its magic.



**Figure 13: Final Step in the Subscriber Import Wizard – Selecting the List**

A list of approximately 50,000 subscribers should import within 20-30 minutes, depending upon the amount of custom data being associated with each subscriber.

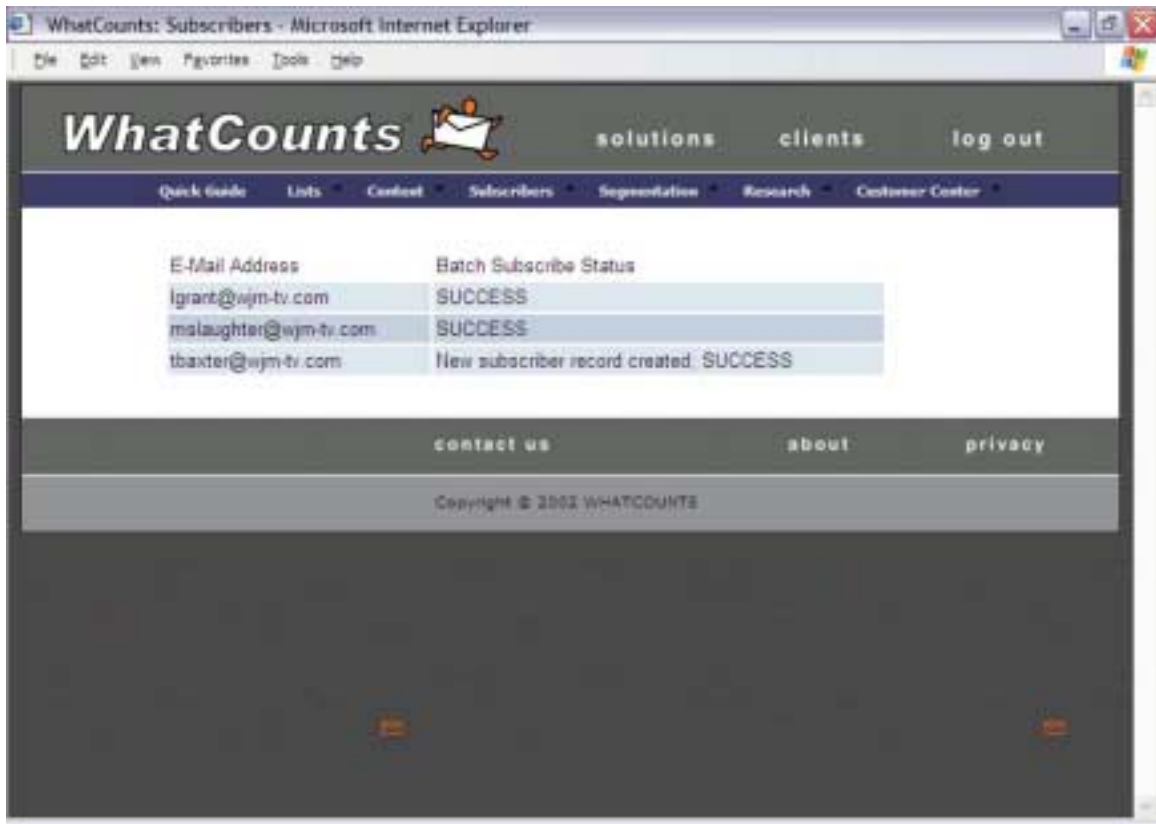
## Batch Subscribing

If there's ever a need to subscribe a handful of people at one time, without going through the whole list import process, you can use the batch subscribe feature. It's found under the *Subscribers* drop-down menu.



**Figure 14: Using Batch Subscribing for New Users**

Subscribing one or more individuals through this interface is straightforward. Enter or paste a group of email addresses separated by commas, spaces or semi-colons and mark the list or lists you want them subscribed to. If you want to include a column from Excel, just select that column of data, copy it to your clipboard and paste into the batch import screen.



**Figure 15: Batch Subscribe Results**

After pasting or typing in your email addresses, select one or more lists to subscribe them to and, for each list, select the format you'd like to assign them. If your list is utilizing the formatting "sniffing" feature, you can safely set your subscribers to receive "plain text" and rely upon the multipart MIME feature to deliver the appropriate format of content to them.

After you've selected the lists or lists to subscribe them to, press the *Subscribe* button to begin the process.

It's recommended that for lists greater than a hundred or so that you use the import wizard. Also, through this interface you can only enter in subscriber's email addresses (though you can always update their individual records at a later time).

### **Batch Unsubscribing**

Similar to the batch subscription process, the batch unsubscription process allows you to remove subscriptions for one or more individuals. Use the interface the same way – only this time select the lists you'd like the subscribers removed from.

## Exporting Subscribers

If you'd like to get a data dump of all your subscribers, you can do so through the export wizard. Reached via the *Subscribers* drop-down menu, the Export Subscribers wizard makes it easy to create a data file of your subscribers. Through the wizard you can specify which fields to include as well as the format. The two choices are comma-separated-values (CSV) or XML.

Using the wizard is a two step process. The first step requires you to identify the list you'd like to export from, the type of segmentation to apply (this will be discussed later), and the format for your data file.



**Figure 16: The Subscriber Export Wizard**

After selecting your list, segmentation, and format, you're presented with a screen that displays the number of people that will be exported and allows you to select the fields you'd like to export/write.

Like the import wizard, the export process is capable of functioning in the background. So, once you start it, you don't need to wait for it to complete. When it's done you'll be alerted by an email message.

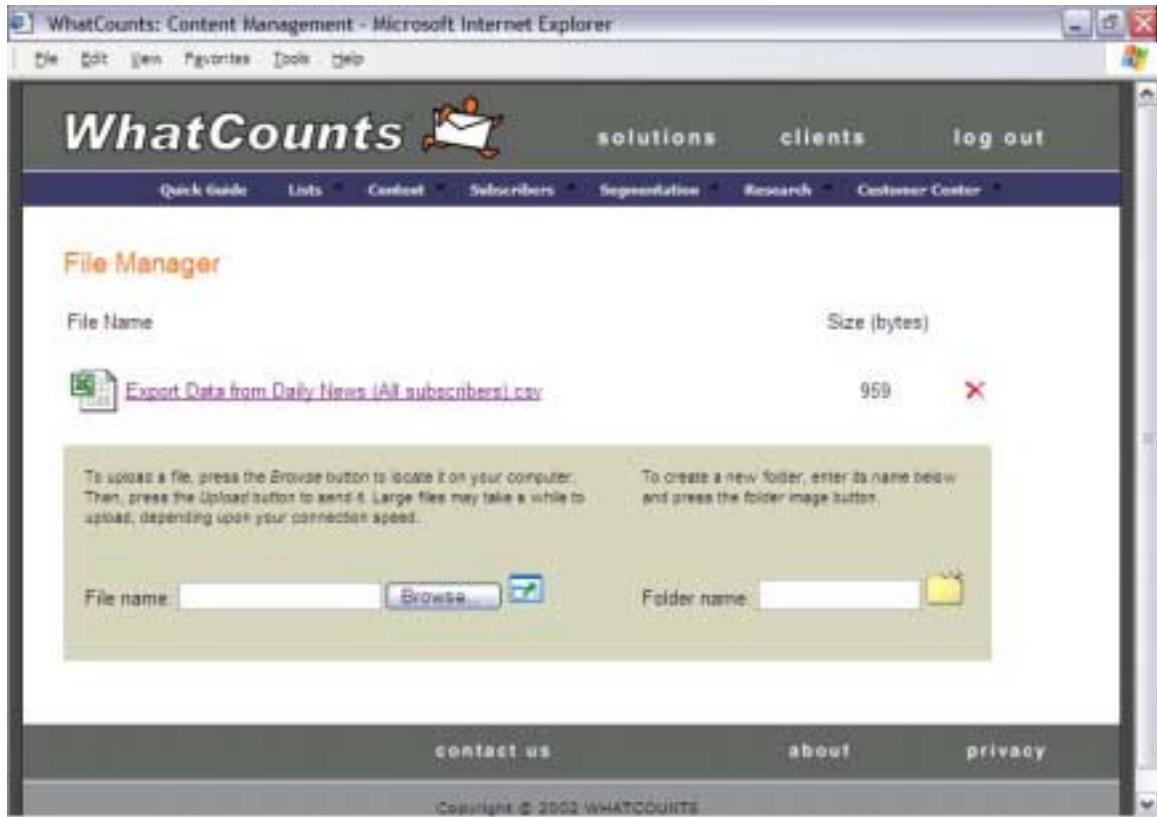


**Figure 17: Selecting Export Fields**

You can download your exported data file through the WhatCounts file manager. It can be reached through the File Manager option on the Content drop-down list. You'll have to have the proper permission levels to reach this screen. If the wizard progress screen is left displayed, your browser will automatically be redirected to the File Manager screen upon completion of the export process.

## File Manager

The file manager displays a list of files that you can view, download or delete. To view a file, select it with your mouse. It should display in your browser's window. Some files can't be display in your browser and must be downloaded.



**Figure 18: Viewing Files through the File Manager**

To download a file select it using your right mouse button and choose the floating option item labeled *Save Target As...* A dialog box will appear that lets you select a download location for the file. For Macintosh users, refer to your browser's documentation for information related to saving information in this manner.

## Searching for Subscribers

To locate a specific subscriber, use the Search for Subscriber feature located under the *Subscribers* drop-down menu. Enter in as much information as possible. Entering an exact email address is fastest.

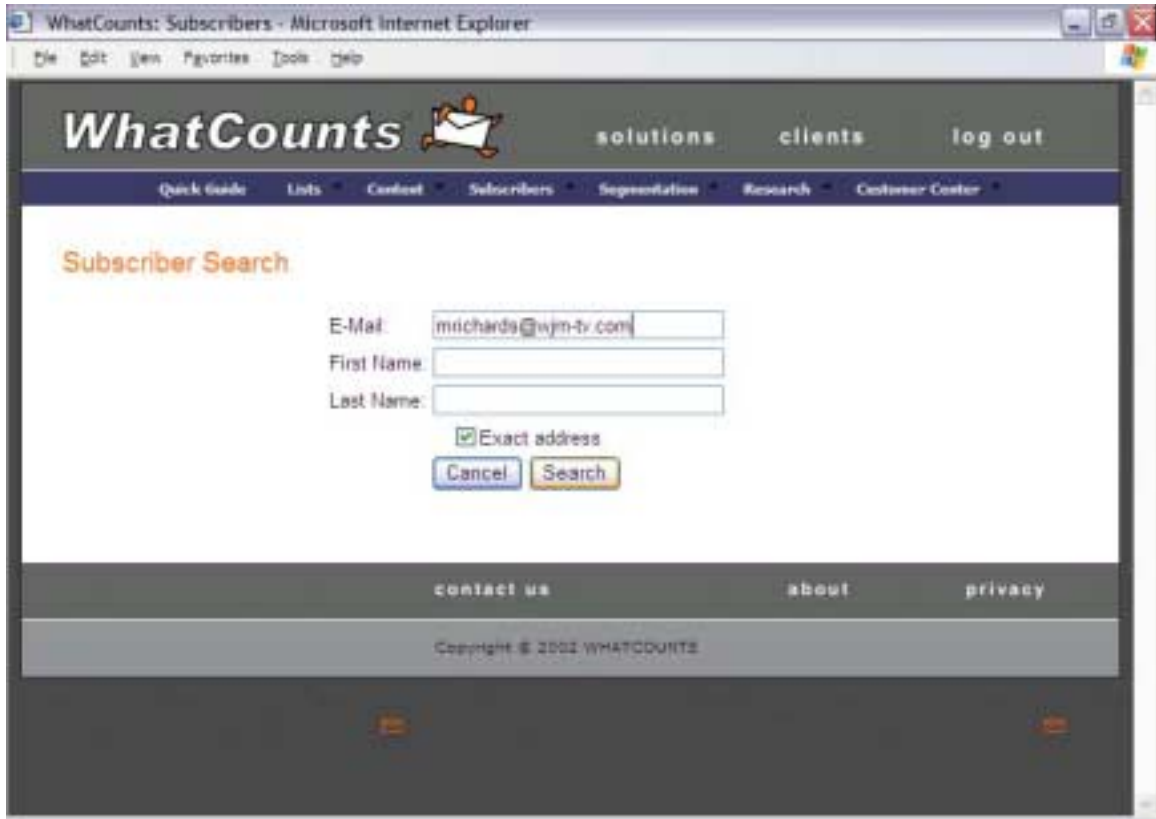
The image shows a screenshot of a web browser window titled "WhatCounts: Subscribers - Microsoft Internet Explorer". The browser's address bar and menu bar are visible at the top. The main content area of the page features the "WhatCounts" logo on the left, with navigation links for "solutions", "clients", and "log out" on the right. Below the logo is a dark blue navigation bar with links for "Quick Guide", "Lists", "Contact", "Subscribers", "Segmentation", "Research", and "Customer Center". The central part of the page is titled "Subscriber Search" and contains a search form. The form has three input fields: "E-Mail" (containing "mrichards@wjm-tv.com"), "First Name", and "Last Name". Below these fields is a checkbox labeled "Exact address" which is checked. At the bottom of the form are two buttons: "Cancel" and "Search". The footer of the page includes links for "contact us", "about", and "privacy", and a copyright notice: "Copyright © 2002 WHATCOUNTS".

Figure 19: Searching for Subscribers

If you wanted to find everyone that has a common address (or belongs to the same company), you could enter partial information. For example, to show everyone that has an address from Microsoft you could enter "microsoft.com" in the email field and make sure the *Exact address* checkbox was unmarked.

If multiple records are found, you'll be shown a list from which to choose. If only one record is found you'll be immediately redirected to the User Details page with that user's information prepared for you to view or edit.

## Editing Subscriber Records

The search feature reveals a list of subscribers. To edit a record for one of them select their email address. You'll be taken to the User Details page and be able to change anything about that individual – including their Subscribed lists.

The screenshot displays the 'User Details' page for a subscriber named Mary Richards. The page is titled 'User Details' and shows the following information:

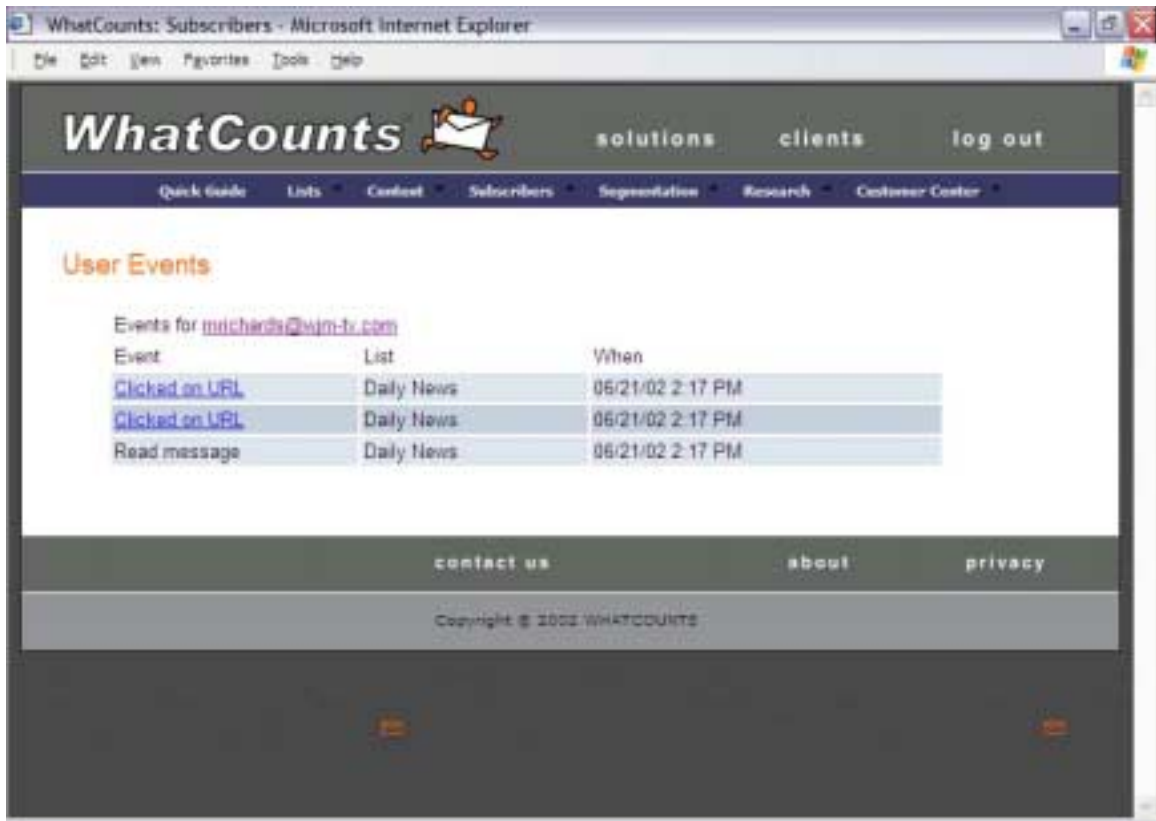
- Name:** Mary Richards
- E-Mail:** mrichards@wjm-tv.com
- First Name:** Mary
- Last:** Richards
- Company:** WJM-TV
- Address:** 119 North Weatherly, Apartment D
- City:** Minneapolis
- State:** MN
- Zip:** 55401
- Country:** United States
- Phone:** [Empty]
- Fax:** [Empty]
- Browser:** (Unknown)
- IP Address:** [Empty]
- Custom Data:**
  - Age: 34
  - may: [Empty]
- Subscribed Lists:**
  - Daily News (HTML) 05/21/02 2:20 PM

Buttons at the bottom include 'Show Events', 'Cancel', 'Delete', and 'Update'.

Figure 20: Editing a Subscriber Record

## Examining Subscriber Events

On the subscriber edit page there's a link labeled *Show Events*. If you press this you'll be shown all the events associated with that particular user. If they've read any of your HTML email or clicked on any of the links you've sent them – you'll see it revealed here. Naturally, this information is only available for lists that have had tracking enabled.



The screenshot shows a web browser window titled "WhatCounts: Subscribers - Microsoft Internet Explorer". The page header includes the "WhatCounts" logo and navigation links for "solutions", "clients", and "log out". A secondary navigation bar contains links for "Quick Guide", "Lists", "Contact", "Subscribers", "Segmentation", "Research", and "Customer Center". The main content area is titled "User Events" and displays a table of events for the subscriber "mrichards@vym-tr.com". The table has three columns: "Event", "List", and "When".

Event	List	When
<a href="#">Clicked on URL</a>	Daily News	06/21/02 2:17 PM
<a href="#">Clicked on URL</a>	Daily News	06/21/02 2:17 PM
Read message	Daily News	06/21/02 2:17 PM

The footer of the page includes links for "contact us", "about", and "privacy", along with a copyright notice: "Copyright © 2002 WHATCOUNTS".

Figure 21: Event Information for an Individual Subscriber

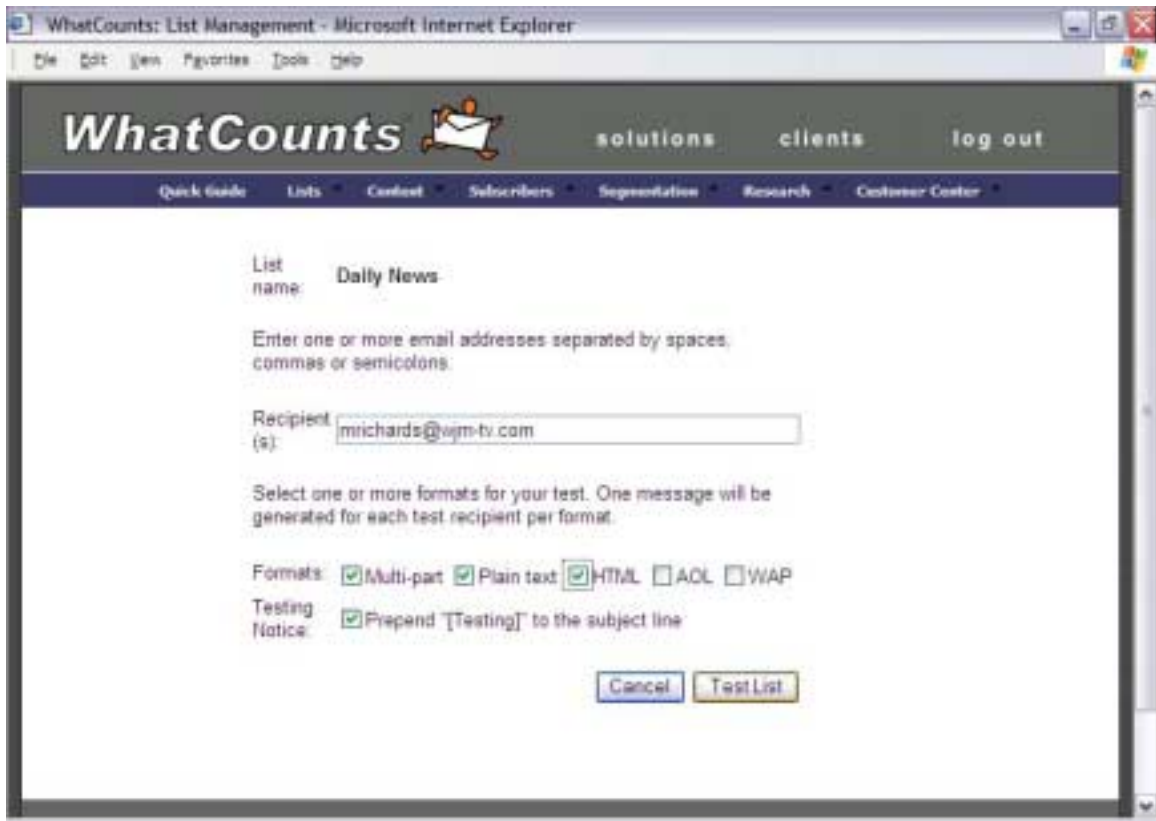
# Running and Testing Lists

## Testing Lists

Testing your lists is probably the most important action you'll perform when using the system. It's the best way to spot errors in your content or with how your list has been setup prior to deploying your campaign to all your subscribers.

The old adage used in building "measure twice, cut once" can be applied to email as well but changed to read "test, test again, test one more time, test even one more time if your job depends upon it, and then deploy."

To test a list, select *Test List* from the *Lists* drop-down menu. A page similar to the one below will be shown. Select the list you wish to test from *List Name*, then select *Text List*. In the *Recipients(s)* text box, enter in the email addresses of the individuals you'd like to receive your test message. Then, select the formats you'd like sent. By default the checkboxes for Multi-part, Plain text, and HTML are all selected. This gives you an easy one-step way to send three versions of your content for review. When the *Testing Notice* box is checked, "[Testing]" will automatically be added to your email before the subject line you have selected. This will allow you to easily identify your test emails.



The screenshot shows a web browser window titled "WhatCounts: List Management - Microsoft Internet Explorer". The page features the WhatCounts logo and navigation links for "solutions", "clients", and "log out". A menu bar includes "Quick Guide", "Lists", "Content", "Subscribers", "Segmentation", "Research", and "Customer Center". The main content area displays a form for testing a list. The "List name" is set to "Daily News". Below this, there is a text box for "Recipient (s)" containing the email address "mrichards@ajm-tv.com". A section for "Formats" includes checkboxes for "Multi-part", "Plain text", "HTML", "AOL", and "WAP", with the first three checked. A "Testing Notice" section has a checked checkbox for "Prepend '[Testing]' to the subject line". At the bottom of the form are "Cancel" and "Test List" buttons.

Figure 22: Testing a List

One thing to note about multi-part messages is that if your email client is capable of displaying HTML, they'll appear just like the HTML version. To determine which format you actually received, check your email message headers. In Outlook you can do this through the *View* menu for a message. Select *options* to display your message's headers and scroll down through the information until you see the line that starts with *Content-type*. It will read *text/html* if the email was only sent in HTML or *multipart/alternative* for a multipart MIME message.

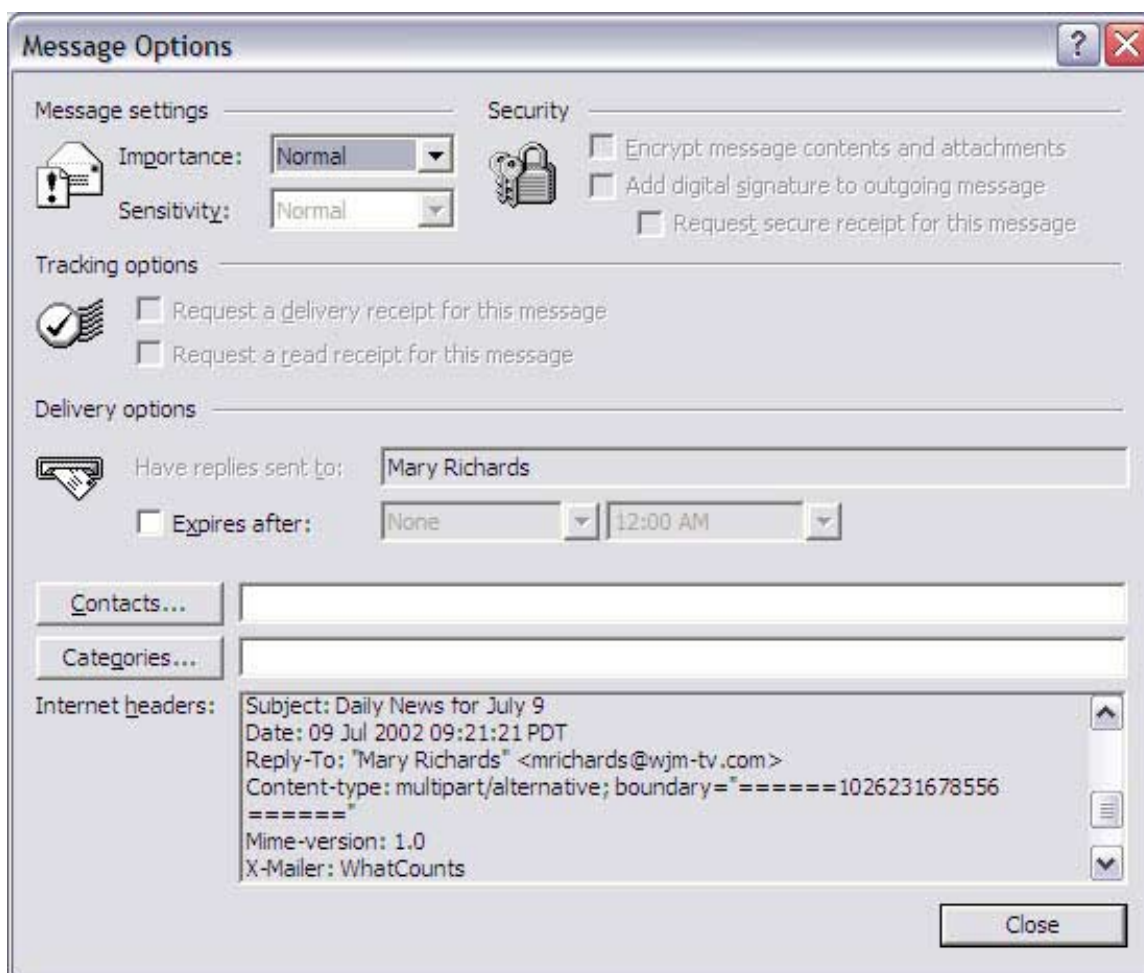


Figure 23: Outlook's Message Options Dialog with Header Information

## Running Lists

Running lists starts with the *Run List* command displayed inside the *List Management* drop-down list. The first screen you'll see will ask you to select a list and a segmentation rule. Since the topic of segmentation rules hasn't been covered yet, you can safely select "All subscribers."



**Figure 24: Running a List**

The next screen will display the number of subscribers to that list. If you had selected a valid segmentation rule, your number of subscriber would be adjusted. To begin processing your list, enter in the same password you use to log in and press the *Run List* button.



**Figure 25: Running a List - Selecting the Template and Format Option**

After your list begins to run, you'll be shown a progress bar. You can watch it as your list is run or go on to other utilities within the platform. Like other functions within WhatCounts, this task is capable of running autonomously in the background.

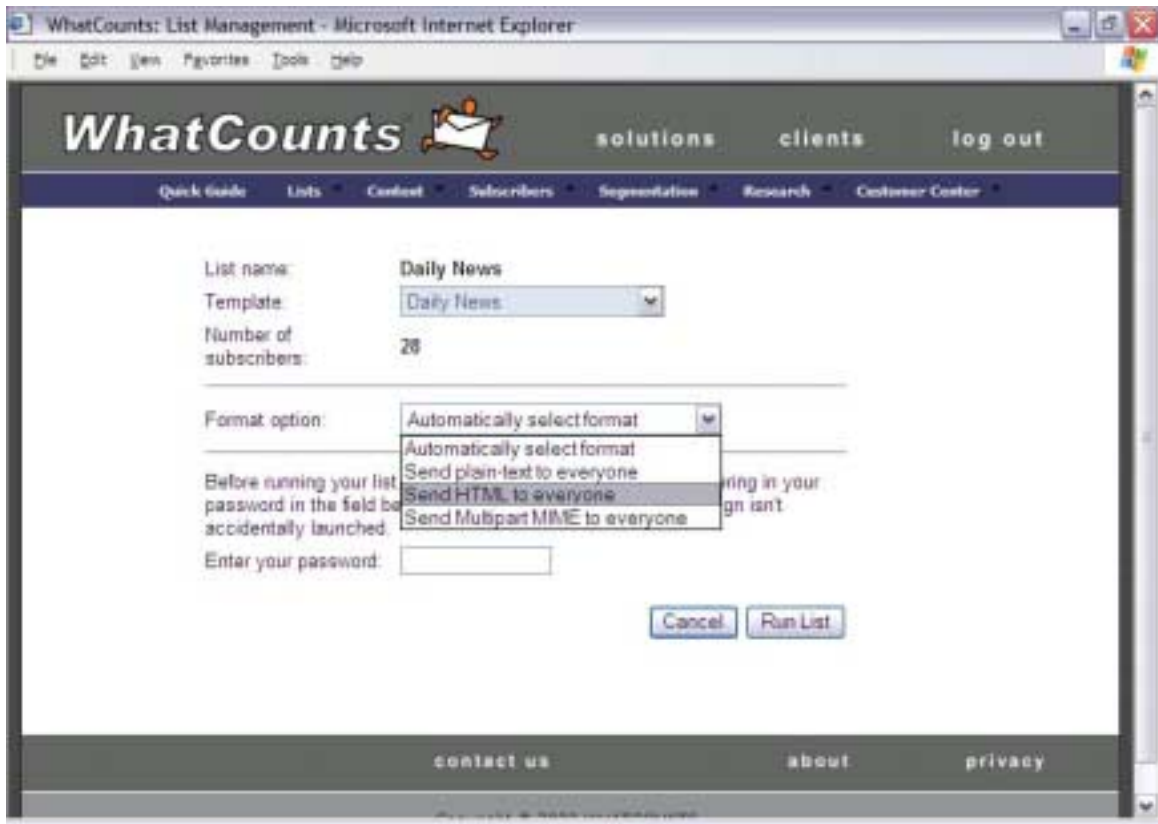


Figure 26: Overriding the Delivery Format Option

# Calendar-based Publishing

The WhatCounts system makes it easy to automate your email publishing tasks. Using the built-in calendar, you simply select a day you want to publish or begin publishing and press the link labeled “Schedule Publishing Event Today.” Today represents the calendar day displayed in a different color from the other days.

To change days, pick a different one with your mouse. Be sure to click on the number for that day. Clicking on a scheduled event displayed within a day’s “box” might confuse you as it will reset the current day to when it was entered.

To change months, select and click on one of the blue arrows displayed near the month and year. If you look at the URL displayed in your browser you’ll see the format used by this program. You can manually enter in different days, months or year to move quickly to different dates.

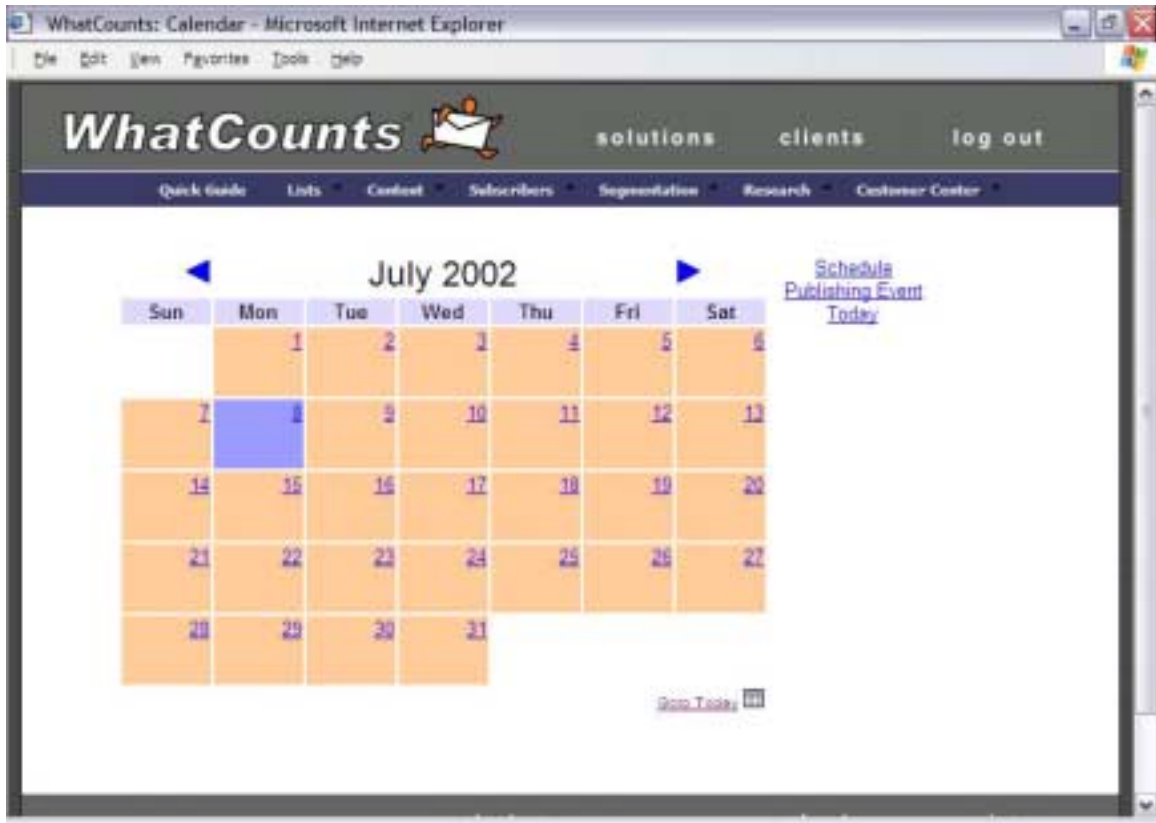


Figure 27: Scheduling a Publishing Event with the Calendar

Besides scheduling single publishing events, you can schedule a list to publish on a recurring basis, such every hour or every day. Similarly, you can select specific days on which to publish.

## One-time Scheduled Publishing

To schedule a one-time publishing event, select the day you'd like your list to publish on using the calendar and press the link labeled "Schedule Publishing Event Today." On the screen that appears:

- **List name:** Select the list you want to deploy (publish)
- **Template:** Select the content you want to be sent to that list
- **Segmentation:** Select any segmentation you want applied to that list
- **Format:** Select your format, or allow what counts to automatically select format.
- **Start Time:** Select the time you want the list to be sent

The screenshot shows a web browser window titled "WhatCounts: Calendar - Microsoft Internet Explorer". The main content area is titled "Schedule Publishing Event" and contains a form with the following fields and options:

- List name: Daily News
- Template: Daily News
- Segmentation: All subscribers
- Format: Send Multipart MIME to everyone
- Start Date: July 8, 2002
- Start Time: 04:29 AM
- Frequency: One-time event (selected), Repeat every 5 min., Repeat every 15 min., Repeat every 30 min., Repeat hourly, Repeat daily, Repeat monthly, Repeat weekly (with checkboxes for Mon, Tue, Wed, Thu, Fri, Sat, Sun)
- Notification:  Send e-mail when this task is completed

Buttons for "Schedule" and "Cancel" are located at the bottom of the form.

Figure 28: Setting the Options for your Publishing Event

Once entered, the system will automatically start and send your list at the specified time. You'll receive an email message when the list has been sent, confirming that the action was performed.

## ***Recurring Events***

The steps required to schedule a recurring publishing event are basically the same as for a one-time event except that you'll be specifying how often you'd like the event to repeat. Your choices are:

- One-time event
- Repeat every 5 min.
- Repeat every 15 min.
- Repeat every 30 min.
- Repeat hourly
- Repeat daily
- Repeat weekly: On selected days (Monday, Tuesday, etc.)
- Repeat monthly

If the frequency of your publishing is high (such as 15 minutes, 30 minutes, or hourly), you might want to uncheck the Notification option so you're not bombarded by confirmation messages.

After you've selected all options on the Select Publishing Event screen, select Schedule to complete the scheduling of your event. Unless you make changes to this event, your email will be sent out as you have detailed on this screen.

## Sticky Campaigns

If you've got a list that you're scheduling to publish very often (such as daily or hourly), you might consider setting an option for that list so that the same campaign number is used over and over. If you don't do this, there will be a new campaign record created every time the list is run. This may make analyzing your data in Reports very difficult.

Consider a list scheduled to run every 15 minutes. That would create a total of 96 campaign records in one day or 676 in a week. It's nothing the WhatCounts system can't handle – but will you be able to track that much information and differentiate between all the different entries?

A list with the sticky campaign option will have a single campaign record. All of the open and click-through events will be recorded for that one campaign – regardless of when they took place.

Setting a list to have a sticky campaign is done on the advanced tab of Edit List.

WhatCounts: List Management - Microsoft Internet Explorer

File Edit View Favorites Tools Help

### Edit List

[Name and Addressing](#) [Formatting](#) [Options](#) [Tracking](#) **Advanced** ⓘ

Base URL:

Forward-to-a-Friend: (FTAF)

Custom form:

Envelope:

Landing page:

Error landing page:

Allow anonymous requests

Workflow:

Approval is required before sending

List:

Sticky Campaigns:  Publish using the same (initial) campaign

Set Data:  Disabled  Set value  Increment by value

Value:  Field:

Figure 29: Setting Advanced Options for a List

# Polling & Surveys

WhatCounts has the ability to manage polls that you can include in email messages or on your web site. Polls are a great way to capture information from your user community – either for business or entertainment reasons.

Like other features within the WhatCounts system, polls collect and display their results (to you) in real-time. They've been designed to operate in two different modes: registered or anonymous.

An anonymous poll can be entered by anyone, anytime. Results are collected, but there's no mechanism available to prevent ballot stuffing. Likewise, there's no way to know who's participating in the poll.

Registered polls, on the other hand, can only be run by recipients of your email. Additionally, ballot stuff is prevented because only the first entry for an individual is counted. You are also able to get a list of everyone that participates in your poll.



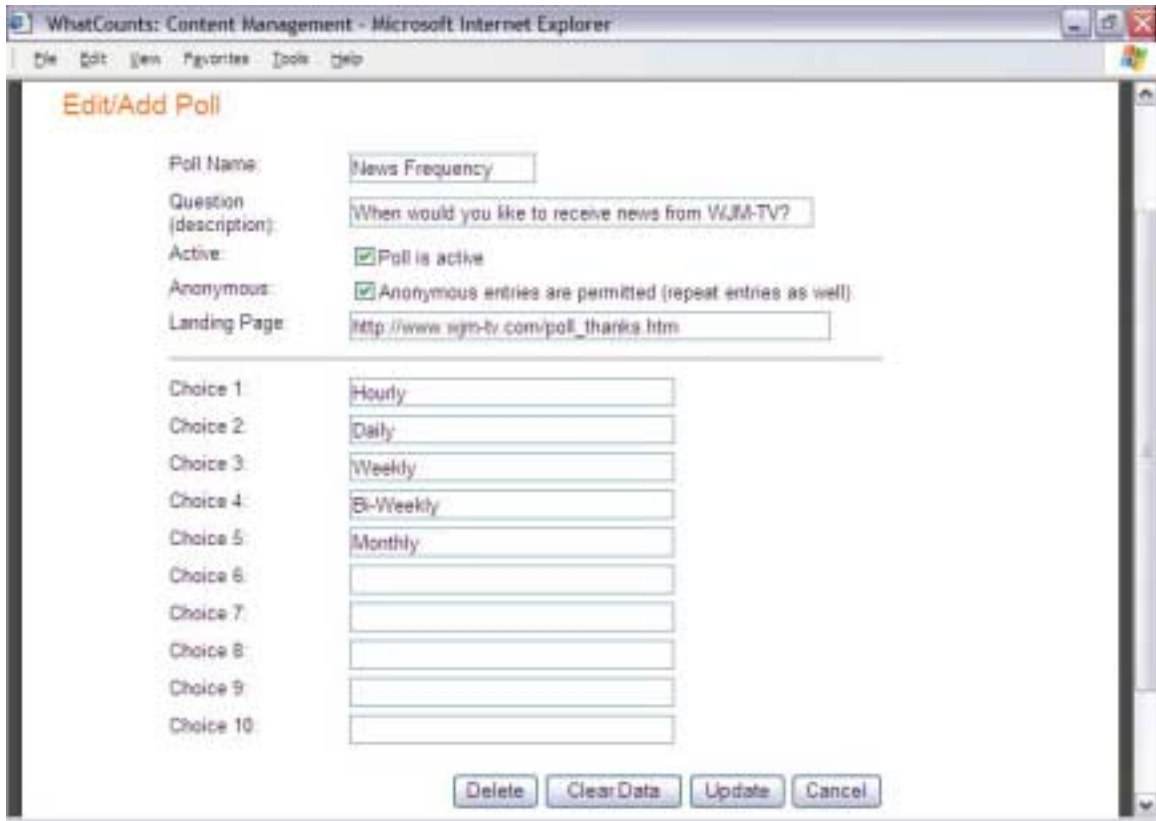
Figure 30: Viewing Polls

## Creating a Poll

Creating a new poll is easy. From the CONTENT drop down, select VIEW POLLS. The *Add New Poll* link shown on the Polls screen (previous figure) will display the following form. Provide the following information:

- Poll name (Users will not see this information; provide a name that's useful to you.)
- Question for the poll. What is it you're asking?
- Is the poll active?
- Is the poll anonymous, or should it be only for registered users? If you want only registered users to enter, leave this box unchecked.
- Choices (up to ten can be entered)

That's all that's required to create a new poll. You may create as many polls as are required for your campaigns.



The screenshot shows a web browser window titled "WhatCounts: Content Management - Microsoft Internet Explorer". The main content area is titled "Edit/Add Poll". The form includes the following fields and options:

- Poll Name:** News Frequency
- Question (description):** When would you like to receive news from WJLA-TV?
- Active:**  Poll is active
- Anonymous:**  Anonymous entries are permitted (repeat entries as well)
- Landing Page:** http://www.wjla-tv.com/poll\_thanks.htm

Below these fields are ten choice input boxes:

- Choice 1: Hourly
- Choice 2: Daily
- Choice 3: Weekly
- Choice 4: Bi-Weekly
- Choice 5: Monthly
- Choice 6: (empty)
- Choice 7: (empty)
- Choice 8: (empty)
- Choice 9: (empty)
- Choice 10: (empty)

At the bottom of the form are four buttons: Delete, Clear Data, Update, and Cancel.

Figure 31: Creating a New Poll

## Testing Your Poll

After you select the CREATE button on the Edit/Add Poll screen, you will be returned to the list of Polls, click on the *test* icon (gear) for any poll in the list. Your poll will be shown and you'll be allowed to test it. Entries will be recorded and you'll be able to see the results when you're done. If you entered a Landing Page, you will be taken to that URL after selecting ENTER. Otherwise, you will be sent to the WhatCounts default thank you page.

To view the statistics for your poll, select the VIEW STATS icon next to your poll on the View Polls screen.



Figure 32: Testing Your Poll

## Adding a Poll to your Email

The poll system will soon have a wizard that will help prepare HTML you can include in your email messages. Until it's released, follow these steps.

### Include Poll Form

The following snippet of HTML can be placed into your email template. Be sure the method for the form is GET if the poll is meant to be run directly from an email message. Change the content to reflect your poll's question and possible choices.



Figure 33: Poll Wizard: Step One - Selecting your Target Environment



Figure 34: Poll Wizard: Step Two – Creation of the HTML

### Sample Code

```
<form action="http://whatcounts.com/bin/poll" method="GET">
<input type="hidden" name="id" value="44">
<table width=200 border=1>
<tr>
<td><P>When would you like to receive news from WJM-TV?</td>
</tr>
<tr>
<td><P><input type="radio" name="a" value="1">Hourly</td>
</tr>
<tr>
<td><P><input type="radio" name="a" value="2">Daily</td>
</tr>
<tr>
<td><P><input type="radio" name="a" value="3">Weekly</td>
</tr>
<tr>
<td><P><input type="radio" name="a" value="4">Bi-Weekly
</td>
</tr>
<tr>
<td><P><input type="radio" name="a" value="5">Monthly</td>
</tr>
<tr>
<td align=center><input type="submit" value="Enter"></td>
</tr>
</table>
</form>
```

Choices are represented by fields with the name “a” (for answer) and values that start at 1 and end at the total number of questions you’ve defined for your poll. The formatting of the information in your template is up to you.

You can even change the question and choices, or how they appear. The only thing required for the poll is its ID and the choices.

## Change the poll id

Add a link similar to the following and set the value to be your poll’s ID. You’ll find this number displayed in the address bar when you select your poll’s name from the poll list and go to the Edit/Add Poll screen.

```
<input type=hidden name="id" value="44">
```

## Include a tag for the subscriber

If your poll isn’t anonymous, you’ll need to add a tag that will identify the user taking the poll. Include the following hidden field to your form:

```
<input type=hidden name="sid" value="%%SUBSCRIBER_ID_TAG%%">
```

## Specifying a Landing Page

What does the user see after they’ve taken your poll? You can specify a custom landing page using the hidden form field named “goto.” Include a line similar to the following into your form, changing the value to a web page on your own site.

```
<input type=hidden name="goto" value="http://www.wjm-  
tv.com/thanks.html">
```

## Testing Your Form (and Poll)

Test your poll using the form you’ve just created by saving it to a new HTML file and opening that file using your browser. Note, however, that you can’t test a non-anonymous poll without proper subscriber information. You could always send yourself a mail message containing the poll, or you could temporarily set the poll to be anonymous.

You can also test the poll using a built-in test feature described previously.

## Viewing Poll Results

Since poll results are collected and stored in real-time, you can see them whenever you wish. Just click on the icon of the pie chart under View Stats for the any poll in the poll list. You'll see the question you entered for the poll along with the total number of responses and which answers were chosen. The information is displayed graphically.

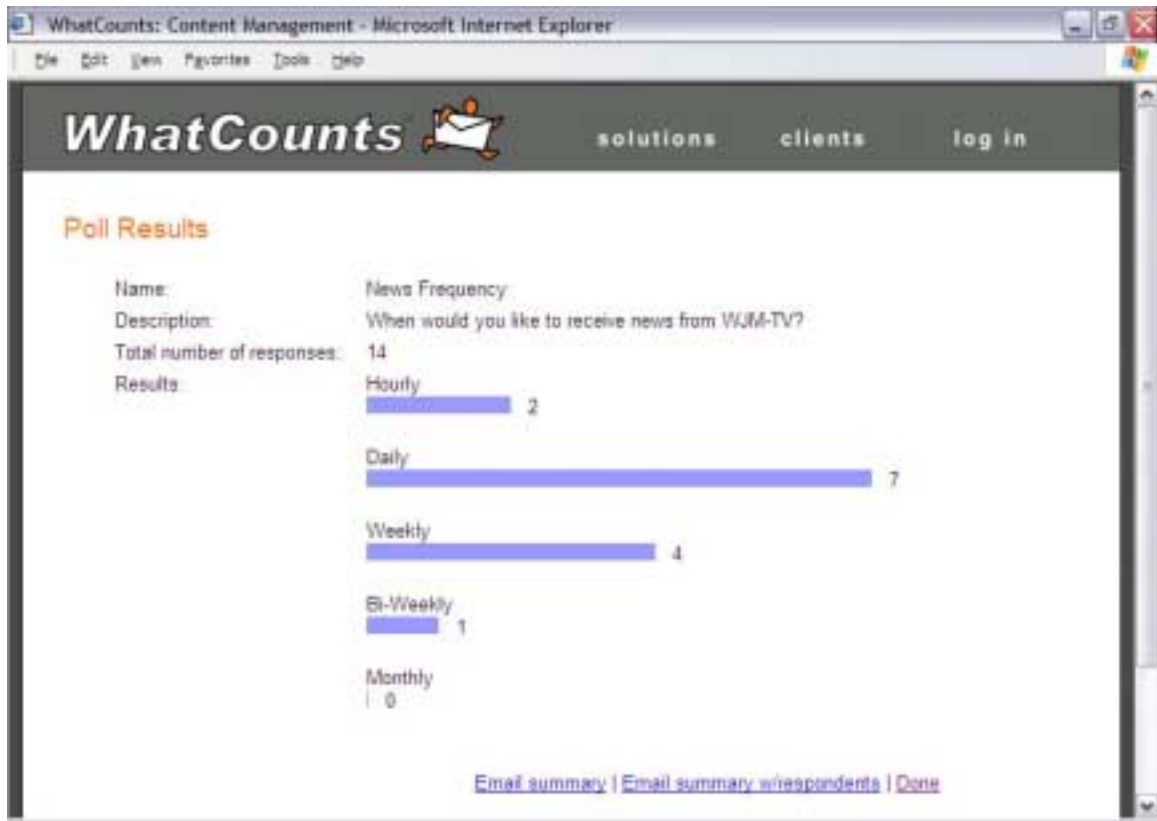


Figure 35: Viewing poll results

To send this information to yourself through email, click on the link labeled *Email summary*. To send the information along with a list of participants, click the link labeled *Email summary w/respondents*. This feature is only useful for polls that are not anonymous, as anonymous polls will not store respondent information.

# Custom Fields & Segmentation

Custom fields allow the WhatCounts system to adapt to your information and the way you use it within your organization. In essence, custom fields allow you to extend the WhatCounts database so that it stores data you've defined and associated with all your users or recipients.

Suppose your organization has the notion of "membership." Some users are members, and some are not. Now, suppose you've been keeping track of that information by storing a "Y" or an "N" in your database in a field named "membership\_status." To extend that level of detail to the WhatCounts system you simply need to create a new custom field named "membership\_status" and import that information into the system.

Custom fields do more than simply store your information. Whatever is stored within them can be merged into your templates. So, if you did, in fact, have a field named "membership\_status" and it contained either a "Y" or an "N", you could do things like the following inside your templates:

```
<H1>Welcome
%%if membership_status = "Y" then print "member" else print "guest"%%
```

They're also the foundation for performing segmentation, as you will soon see, and allow you to direct very specific information to highly targeted audiences.

## Creating Custom Fields

Access the custom field list through the *Segmentation* menu. Click on the link labeled Custom Fields. Custom fields can be one of the following types:

- Number
- Date (a date/time)
- String (textual)

Create the custom field type that best matches your intended use and the type of data you plan to store. When choosing a name for custom field, it is best to select one word names. You may also use an underscore to join words. In the example above, "membership\_status" would have been defined as a string field. But, if your database represented members by the value 1, for example, and non-members with 0, then it would have been a number field.

## Creating Segmentation Rules

You've just learned that custom fields can be used to store your information and that templates can merge their data into your email. Now it's time to learn how you can use custom fields (and their data) to segment your list into pieces – effectively splitting up your lists into one or more pieces for the purposes of targeting.

The applications for segmentation are many and include things like:

- Separating lists by membership status
- Separating lists by purchase history
- Separate lists by demographics (locale)

Although the WhatCounts platform allows you to create as many lists as you like, companies often have one or a few lists and take advantage of data structures to form important groupings, or segments.



Figure 36: Creating or editing segmentation rules is performed using this interface

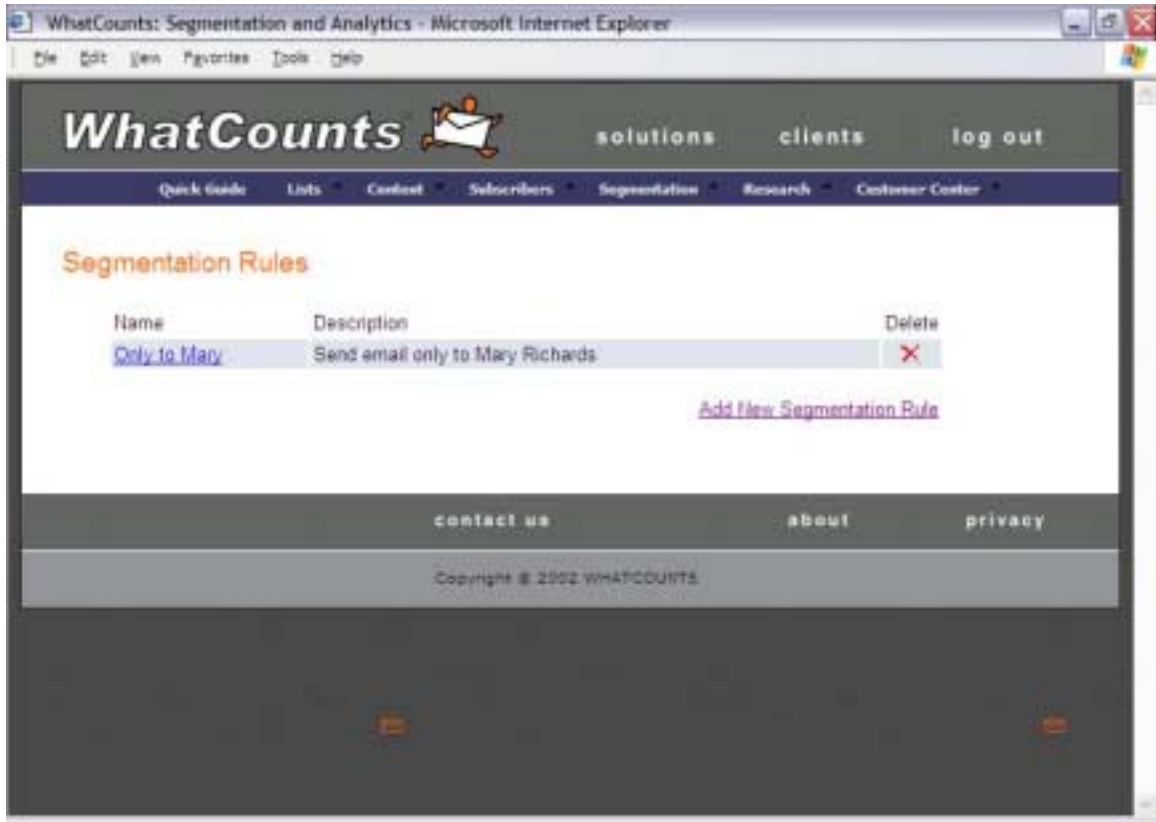


Figure 37: Viewing available segmentation rules

## Field Names

The field-name drop down will list all the built-in field names as well as any custom fields you've defined. Custom fields will be designated by a leading asterisk (\*) symbol.

## Comparison Operators

Comparison operators select the test to perform against the selected field and the value you provide (see next description). Operators are broken into three distinct groups: Text, Number, and Date.

<b>Text operators</b>	Equals	Is the field equal to the value? This is a string comparison and may be case sensitive.
	Contains	Does the field contain the value?
	Starts with	Does the field begin with the value?
	Ends with	Does the field end with the value?
<b>Numbers</b>	=	Is the numeric field equal to the value?
	!=	Is it not equal to the value?
	>	Is it greater than the value?

	>=	Is it greater than or equal to the value?
	<	Is it less than the value?
	<=	Is it less than or equal to the value?

## Applying Segmentation Rules

Now that you've learned to create segmentation rules, it's time to understand what to do with them. Using WhatCounts, you can apply segmentations to split up a list at run (deployment) time, when exporting, or when creating sampling groups.

## Running Lists

Running (publishing) is, perhaps, the place where segmentation will most often be applied. To utilize your segmentation rules for running lists, select LISTS>RUN LIST (DEPLOY CAMPAIGN). In the first screen displayed, select the name of your segmentation rule. The first segmentation option will always be "All subscribers," but if you've created your own rules they'll appear in the drop down.

After selecting one of your own rules and pressing the RUN LIST button you'll get a count of the number of subscribers that match your rule. In all likelihood this will be less than the total number of people in the list.

From this point forward, the run process is the same as what you learned at the beginning of this manual with the only difference being that instead of sending email to everyone in a particular list, you'll be sending to some sub-group or segment that matches the criteria you defined.

## Running Lists for Testing

Running segmentation rules is an ideal way to perform testing. Although there are test functions built into WhatCounts, there are some features which can only be tested by a list being deployed. Examples are non-anonymous polls, unsubscribe-related links, and the forward-to-a-friend (FTAF) feature. So, to test these features we recommend you create one or more segmentation rules that narrow your lists deployment to just you or a small group of people you have chosen as "testers."

To create a rule that just matches you, add a new segmentation rule with the field name 'Email Address', set the Comparison Operator to "[Text] equals," then enter your email address in 'Value.'

To create a rule that matches everyone in your company, set field name 'Email Address,' set the Comparison Operator to "[Text] ends with," then enter your company's domain name in 'Value.'

## Exporting Lists

Segmentation rules are also useful during exportation of your lists. Suppose you wanted to collect and then export information associated with just one type of user – such as someone designated as a "member." Using Export Subscribers, select the list, then the name of the segmentation rule that identifies this group and continue as you normally would. Instead of exporting all the entries in a particular list, this time only those subscribers that match your segmentation rule will be exported.

## N-Way Sampling

Email is a perfect medium for testing new ways to communicate with your customers. It's fast and relatively inexpensive. N-way sampling is a feature which can be used to split up your lists into equally sized pieces so that you can perform different tasks with the subscribers defined by those pieces.



The screenshot shows a web browser window titled "WhatCounts: List Management - Microsoft Internet Explorer". The page header features the "WhatCounts" logo and navigation links for "solutions", "clients", and "log out". A secondary navigation bar includes "Quick Guide", "Lists", "Content", "Subscribers", "Segmentation", "Research", and "Customer Center". The main content area is titled "Edit/Add a Custom Field" and contains a form with the following elements:

- Field Name:** A text input field containing "nway".
- Type:** Three radio button options: "Number" (selected), "Date", and "String".
- Description:** A text input field containing "Use for Nway segmentation".
- Buttons:** Three buttons labeled "Delete", "Update", and "Cancel".

The footer of the page includes links for "contact us", "about", and "privacy", along with a copyright notice: "Copyright © 2002 WHATCOUNTS".

**Figure 38: Creating a field that can be used in n-way sampling**

For example, if you had three offers you wanted to test against a small list of 3,000 users, you could use the N-Way Sampling to create segmentation rules that could be used to accurately separate your list three ways. You could then send each of your offers to each of these segmentation groups and compare the results.

The N-Way Sampling can split a list into  $n$  pieces (you define the value of  $n$ ) in a linear or random fashion. In the case of our test group of 3,000 users, a linear separation would go through the first 1,000 people and assign them the number 1, the second 1,000 the number 2, etc. If you selected to break your 3,000 user list in 3 pieces randomly, then each person in the list would receive a 1, 2 or 3 in a random manner.



**Figure 39: Splitting your list into sample groups can be done with the N-Way Sampler**

N-Way Sampling can split up an entire list, or one defined by a segmentation rule. So, if you wanted to only test an offer to three groups out of a million person list, you might select a segmentation that first pulled out 100,000 users – perhaps those belonging a certain state or matching other criteria. Then, the wizard would begin splitting up that sub-group n-ways.

# Articles

You've already learned that templates allow you to create and store a diverse amount of information that can be emailed to your customers or audiences. Articles extend this capability by providing you a template-neutral place in which to create and edit your content.

If you've got several templates, there might be some information that's repeated in each of them. Perhaps it's a company logo, address or copyright notice. You could place this information into each template, but if the information changes, you'd have to edit it in multiple places.

Articles let you keep one copy of information that can be applied in multiple places – most often inside templates. Articles were modeled after articles in journalism, but their use is more flexible. They contain sub-elements such as decks, titles, callouts, author fields, etc. – but what you put into these sub-elements, and how you use the information, is totally up to you.

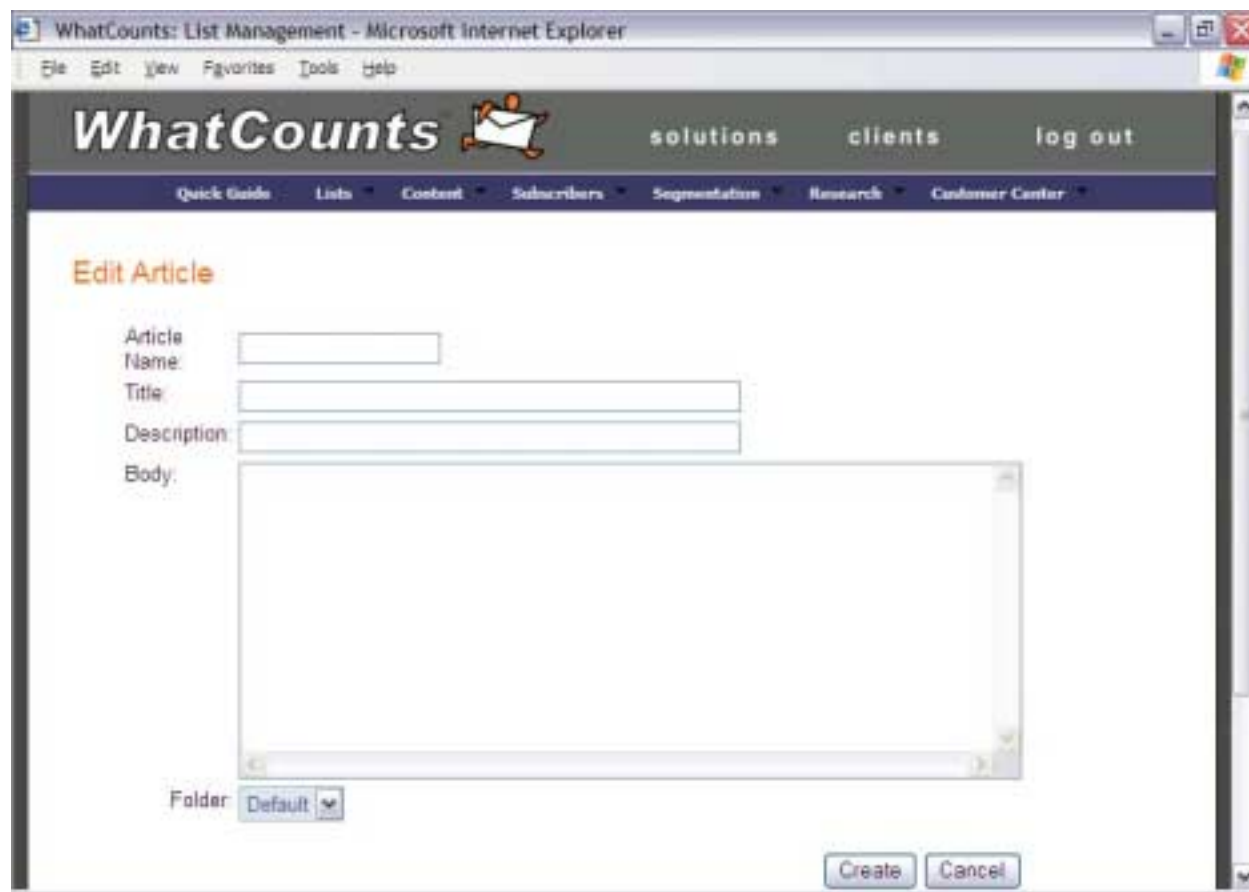
## Creating New Articles

To create a new article, select "View Articles" from the *Content* tab on the WhatCounts web site. Once you have created articles, you will see the list of them displayed here.



Figure 40: This list shows you all the articles available for editing

You will also see a link on that page labeled [Add new article](#). Click that to create a new article. You'll see a screen similar to the following.



**Figure 41: Creating new article content is accomplished through this interface**

Name your article. Use a name that's descriptive and will allow you to recognize the purpose of the article and what it contains. Paste or type your information into the body area and press the "Create" button to save your work. Your browser will be redirected to the Articles screen again. This time, you should see the name and description of the article you just created.

### ***Editing Articles***

To edit an article, select it from the article list. You'll see a screen that looks the same as the one you saw when you first created the article. This time, however, the action button will be labeled "Update."

There's more to an article than what you see through the default create or update screens. When you're at the article list, click on the link labeled [Switch to Advanced mode](#) and then select one of your articles. This time several previously hidden fields will be revealed, allowing you to store more information.

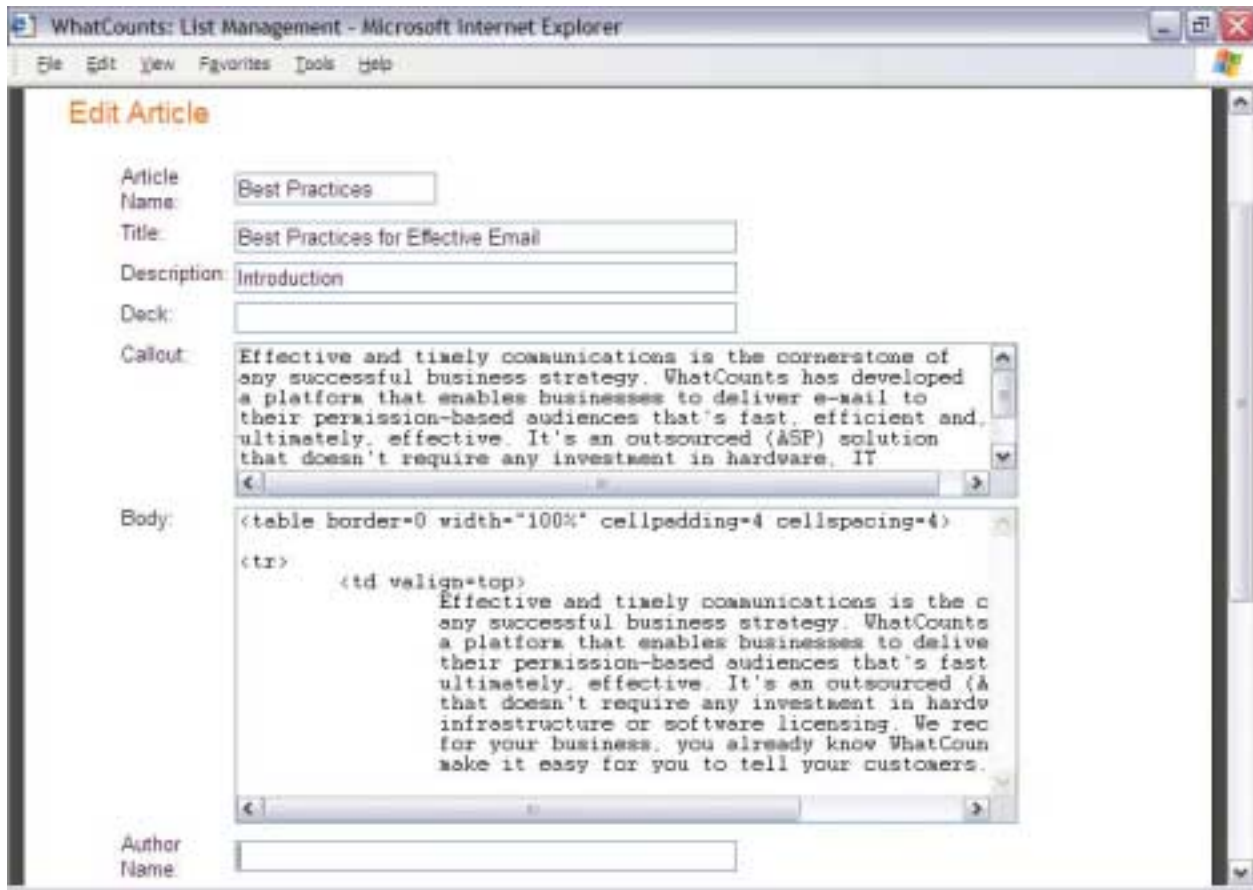


Figure 42: Advanced editing reveals previously hidden fields

## Using Articles within Email Templates

To utilize this feature, create an article. Then, include the content from your article inside your template using one of the following forms of scripting:

```
%%article "article name"%%
```

```
%%if val = "1" then includearticle "article name"%%
```

Article names are case sensitive, so be sure to enter them properly. Additionally, you can include sub-elements of your articles using a slightly different naming convention displayed below. It's modeled after the way you specify different parameters in web pages, so the format should be somewhat familiar.

```
%%article "name=article name&type=element"%%
```

Where **article name** remains the name of your article and **element** is one of the following:

Element	Description
title	Article title
description	Any descriptive information you may have associated with your article

dek	Similar to a subheading
callout	The article's callout (sort of like a capsule summary)
body	Body copy - the content itself
author_name	Author's name
author_email	Author's email address
author_bio	Author's bio

## Using the Microsite™ Viewer

Utilizing the WhatCounts *articles* feature is a convenient way for you to organize content and keep it separate from any particular template (format agnostic). Many customers have begun using articles because they offer them a convenient way in which to edit their material without having to worry about HTML coding.

Still, we've heard some of them ask for help creating microsites because the content they wanted to deliver to their users couldn't fit, design-wise, within their newsletter format. Maybe you've been wondering the same thing. You've got a newsletter and you want to have several short capsule summaries of much longer content appear. The conventional solution was to link off to static web pages on your site - or microsites that we helped you create. This solution works - but it's cumbersome and introduces multiple places where you'd have to edit your content.

The microsite viewer, in essence, creates pages for you using *your* articles and *your* templates completely dynamically, and *on demand*.

### Here's how it works

- You create a template that represents the "container" for your page by placing HTML inside it (within the HTML cell). Give it any name you like.
- You create an article that you want to have displayed within that page.
- Inside your newsletter template you place the tags that enable elements from your article to be displayed (specifically things like its title and callout).
- For the template that will display your full article you place these same tags as well as one for the *body* of your article (examples below).
- You also place a special link inside your newsletter template that points to the new microsite viewer program.

The microsite viewer program can be accessed through <http://whatcounts.com/bin/msv>. If your organization has established DNS aliases that allow you to use your own domain, you can do that.

### Program Arguments (Usage)

The microsite viewer program takes several arguments which tell it which template to use and which article to pour into the template. Here's the list:

Flag or Argument	Description and Usage
id, u or user (optional)	This is the subscriber ID that's specially coded. You can assign it in your newsletters by using the tag <code>%%SUBSCRIBER_ID_TAG%%</code> .
a, article or article_name	This is the name of the article you want to display inside the template. It should match the name that appears in the article list exactly. To include spaces you should use the plus (+) character. So, if your article was named <i>Test Article</i> you might set it using <code>a=Test+Article</code> .
t, template or template_name (optional)	This is the name of the template that content will be poured into. It should match the name that appears in the template list exactly. To include spaces you should use the plus (+) character. So, if your template was named <i>Test Template</i> you might set it using <code>t=Test+Template</code> . Remember, you can use one template for many of your articles. This is easier for you and it keeps your messaging and design model consistent.
aid (optional)	This is the id of the article that be used. Most customers don't reference articles by their id, but you can. To see the different article numbers, hover your mouse over their names in the article list.
tid (optional)	This is the id of the template that content will be poured into. Most customers don't reference templates by their id, but you can. To see the different template numbers, hover your mouse over their names in the template list. The article number will be shown in the status bar of your browser.
r or realm (optional)	This is your customer code or realm and helps the program determine where to find your article. It's used when the microsite viewer is being used in anonymous mode.

## Putting it to Use

If you've got a really long article that you want to include in your email newsletter, here's how we recommend you go about that - taking advantage of the *article* feature inside your email template and the *microsite viewer* to enable your reader to see the whole thing.

- Create your email template and include the callout (capsule summary) of your article using a tag similar to: `%%article "name=Test Article&type=callout%%`. This will display just the callout of your article in your newsletter.
- At the end of that, include a link to display the full article using the microsite viewer using an anchor tag similar to one of the following (make sure it's all on one line in your HTML):

```
<a href="http://whatcounts.com/bin/msv?id=%%SUBSCRIBER_ID_TAG%%&a=Test+Article&t=Test+Template">Read More...</a>
```

```
<a href="http://whatcounts.com/bin/msv?a=MSV+Test&r=whatcounts">Read More...</a>
```

The first sample above shows how the microsite viewer can take subscriber information (`%%SUBSCRIBER_ID_TAG%%`) to determine your customer code. It also allows the viewer to display personalized information inside your article.

The second method of using the viewer is in **anonymous mode**. The example shows the program displaying an article named "MSV Test" for the realm *WhatCounts*. You can actually see the results at <http://whatcounts.com/bin/msv?a=MSV+Test&r=whatcounts>. Notice that when this particular article is displayed it utilizes a default template.

Your email reader will see your article's callout (capsule summary) followed, in our example, with the link labeled *Read More...* If they click on this link the microsite viewer will be run inside a browser window and display their article using their specified template.

## What Goes Where?

Be sure to read about articles and how they are used in our [online help](#), located in the drop-down menu under Customer Center. In particular, the way different elements from a single article can be extracted within your templates (like the callout, for example).

Inside the template you'll create for microsite viewing (not the template for your newsletter), use the following tags to display elements from that article anywhere you like (note: some of these terms are publishing terms):

Tag	Description
%%\$body%% or %%\$article_body%%	Displays the article's body wherever this tag appears.
%%\$title%% or %%\$article_title%%	Displays the article's title wherever this tag appears.
%%\$author_name%%	Displays the article author's name wherever this tag appears.
%%\$author_email%%	Displays the article author's email address wherever this tag appears.
%%\$author_bio%%	Displays the article author's bio wherever this tag appears.
%%\$callout%% or %%\$article_callout%%	Displays the article's callout wherever this tag appears. You may or may not want to use this in your article as it will likely be used as the teaser to the article inside your email.
%%\$dek%% or %%\$deck%%	Displays the article's deck wherever this tag appears.
%%\$article_description%%	Displays the article's description..
%%\$article_name%%	Displays the article's name wherever this tag appears. This probably isn't very useful as the name is really a way for you to identify your article, not to display information to your readers. But hey, we're flexible.

In addition to all the above tags, you can also include personalization tags since every page that's displayed by the microsite viewer gets dynamically associated with a particular user (via the %%SUBSCRIBER\_ID\_TAG%% tag). So, you can include things like:

- %%\$email%%
- %%\$first%%
- %%\$last%%

You can also include custom tags and the built-in tags to display date and time elements.

# Research and Analytics

The *Research* tab in the WhatCounts user interface is the entry point for the real-time analytical reporting. It's here that you'll go to obtain open and click-through tracking information as well as bounce and opt-out data.

## Campaign List

Whenever you run one of your lists you are creating a campaign. The only exception to this is when a list has been defined to use a sticky campaign number. In this case, only a single campaign is created the first time the list is run.

The WhatCounts system records the start time for each campaign run and that information is shown in the campaign list.

List/Campaign	Template	Segmentation	Date Sent	Pieces Sent	Hide?
<a href="#">KerRadio Daily Tech News</a>	Daily Tech Clicks	all	07/03/02 11:34 AM	1,974	<input type="checkbox"/>
<a href="#">KerRadio Daily Tech News</a>	Daily Tech Clicks	all	07/04/02 11:30 AM	1,973	<input type="checkbox"/>
<a href="#">KerRadio Daily Tech News</a>	Daily Tech Clicks	all	07/05/02 9:33 AM	1,972	<input type="checkbox"/>
<a href="#">KerRadio Daily Tech News</a>	Daily Tech Clicks	all	07/06/02 7:53 AM	1,973	<input type="checkbox"/>
<a href="#">KerRadio Daily Tech News</a>	Daily Tech Clicks	all	07/08/02 8:20 AM	1,972	<input type="checkbox"/>

**Figure 43: Campaign list provides high-level performance information**

By default, the list shows the last five campaigns run. You can change how many entries are shown by selecting a different value in the appropriate drop-down list. Each row shown in the campaign list table contains the following information:

- List/Campaign name
- Template used

- Segmentation
- Date Sent
- Pieces sent (total number)

To obtain more detailed information for a particular campaign, click on its name.



Figure 44: Campaigns can be hidden from normal view

## Open Rates

The first screen of the detailed campaign view will show the total number of pieces read as well as calculating the open rate. The open rate only represents the number of HTML recipients that opened your message. As there is no way to calculate open rate on text messages, it may or may not represent the actual number of people that read your content. There's no way to know for sure.



**Figure 45: Viewing open and click-through rates**

Additionally, the preview window of Microsoft's Outlook email clients will trigger the open detection system of WhatCounts giving you, perhaps, a false positive indication of your campaigns effectiveness.

## Click-Through Data

Click-through statistics are also available on the first screen, where open rates are described. To see which of your message's links were actually clicked, and which were the most popular, select the Click-throughs tab.

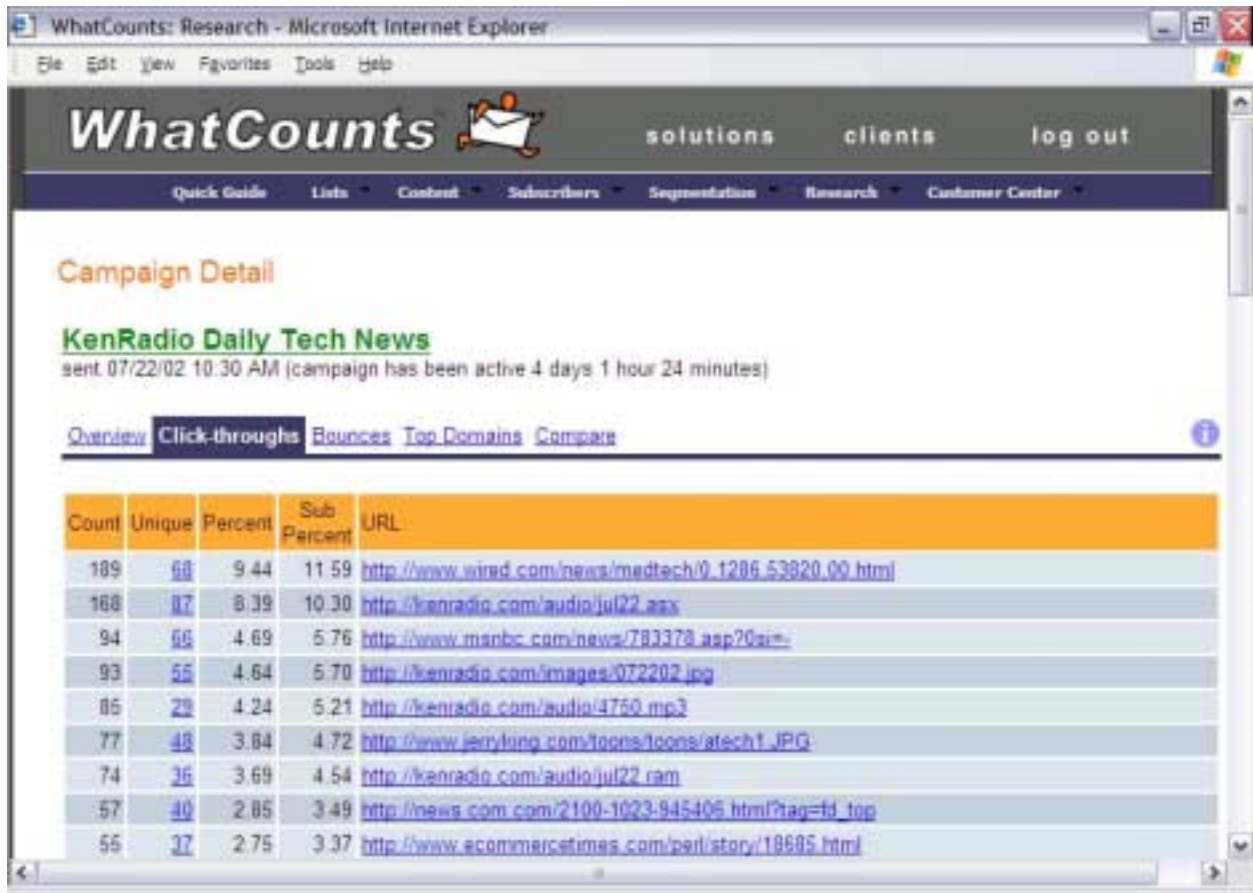


Figure 46: Details click-through data is shown here

Here you'll see a list of links with the most popular ones shown first. For each entry you'll see the total number of times the link was clicked, the total number of unique users for each link, the percentage of time that link was clicked relative to all the messages sent as well as relative to all the other links.

Click-through statistics are a great way to gauge the effectiveness of your campaigns. They can't be fooled by Outlook's preview window and WhatCounts can track them for plain-text and AOL messages in addition to HTML.

## Detailed Click-through Tracking

It is possible to actually see which of your subscribers clicked on a particular link. To do so, click on the number under the unique column in the click-through report.

If the number of unique users is high, you'll be warned that displaying the information could take a while. The actual amount of time depends upon your connection speed and the number of subscribers. Displaying 1,000 names, for example, could take several seconds – even with a fast connection. The delay is largely related to your web browser having to draw 1,000 rows in a table. It's simply a lot of data.

How you use this data is entirely up to you and your organization. WhatCounts suggests that you use it wisely and consider the bond you have with your customers to be one of trust. This

feature wasn't designed for "Orwellian" or spying purposes. Instead, it was designed to give you some greater visibility into the effectiveness of your email messaging initiatives.

# Advanced Features

## *Application Programmer's Interface (API)*

WhatCounts offers a powerful application programmer's interface (API) that enables you to link all of the features of the platform directly to your own applications or web server backend processes. A separate training manual and session covers this topic in detail.

## *Campaign Comparisons*

Under the "Research" drop-down menu is an item labeled *Compare Campaigns* which makes it easy to review results from multiple campaigns simultaneously. The interface is wizard-based and easy to use. Results can be emailed or saved within the file manager system.