

MassEasy Version 3.0

User's Guide



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1. Introduction

What is MassEasy ?

The adoption of Customer Relationship Management (CRM) and the wide coverage of the inexpensive Internet & telecommunication made segmented & personalized marketing campaigns never been easier and cost-effective via email and SMS.

MassEasy is a windows-based application which offers business marketers a simple, yet powerful tool for segmented & personalized email and SMS marketing. It works with most CRM applications and various data repositories to streamline & automate the marketing campaigns workflow from customer segmentation, content merging, campaign scheduling to actual email and SMS distribution. The incredible high-speed Merge Engine & Send Engine delivers large quantity of personalized emails and SMS to your clients, prospects or subscribers efficiently & independently.

Once the software properly installed & configured, business marketers can finish their marketing campaign themselves in 4 simple steps ONLY:

- 1. Create a new campaign or create from the existing template.
- 2. Specify the data source and filtering criteria.
- 3. Load the content template, Email includes: Content (in text or HTML) and attachments (if required); SMS includes: Content (in text)
- 4. Save the campaign and schedule a new task immediately or at a scheduled data/time.

MassEasy help you handle the enormous challenges you face: prepare the target mailing list and mobile phone number lists, merge the personalized content & attachments, and distribute the contents in high speed. It makes your life easier and saves much your time for other aspects.

Features

- Email and SMS support: Deliver content to customers both by email and SMS.
- Template support: Offer campaign template, Email and SMS content template, attachment template etc. Users can create or edit the content of the template.
- Data File Support: Read data files, including text file (CSV), MS Access (MDB) & MS Excel (XLS) as data source.
- ODBĆ Database Support: Read ODBC databases including MS SQL Server, Oracle, MySQL, FoxPro (via ODBC), and all ODBC capable database systems.
- Data Source Filtering: Filter and segment the target customers by selecting the table/query and certain database criteria.
- Data Capture Preview: Verify the query results of the target recipient list and merge fields before actually conducting a merge.
- Content Personalization: Create customized, personalized emails by merging pre-defined merge fields in the content template from data sources.
- Unlimited No. of Merge Fields: Insert as many fields as you want from the data source into the content template. Includes the recipient's name, email address or other information in numeric or text.
- HTML Content Support: Merge & send HTML emails with standard HTML

tags, ASP, Javascript, Flash, in the content template.

- Multiple Email Attachments: Allow to attach multiple files as email attachment to send.
- Email Preview: See the actual view of a merged email or SMS in the format which they support (in plain text or HTML) before they're sent. It is really "What You See Is What You Get".
- Flexible Scheduling: Schedule tasks of campaign to be launched automatically at the specific data/time. It can be selected to capture the mailing list & merge fields from the data source immediately (IMMEDIATE DATA) or at the task's scheduled date/time (SCHEDULED DATA).
- Multiple Campaigns/Tasks Support: Create multiple marketing campaigns and schedule multiple tasks for each campaign simultaneously.
- Multi-lingual Content Support: Merge and send contents with different characters sets, (e.g. Traditional Chinese, Simplified Chinese, Japanese, Korean, etc..) no matter in merge fields, in message text or in HTML content.
- Campaign Acknowledgement: An acknowledgement email or SMS specifying the status, would be sent to the specified mailbox or mobile number after the completion of the campaign task.
- True Multi-threading: Merge Engine & Send Engine are working simultaneously as program threads in pipelining. Need not to wait for all messages of a task merged before sending the first emails.
- Auto System Recovery & Resume: In case of the system halted by any means, the working campaigns and scheduled tasks can be automatically recovered and resumed from the dead point when the system is up again. It prevented to re-send the tasks from the beginning and occur duplicated or missed emails.
- Incredible Speed: Capable of merging 50,000 & sending 100,000 emails per hour.
- Dynamic SMTP Data Flow Control: Automatically slow down MassEasy's fast email sending on-demand to allow slow Mail Servers to "catch their breath." This can help avoid overloading the slow mail servers.
- Various SMTP Mail Server Support: Microsoft IIS, Microsoft Exchange, Lotus Domino, Linux SendMail, and all SMTP-compliant mail servers.
- FREE Opt ional SMTP Mail Server: A FREE SMTP Mail Server (Mail Enable) is bundled with seamles s integration into the MassEasy installation. Need not to have or to integrate with an existing SMTP server. (Supports Window s 2003/2000/NT4.0/Me/XP, except Window s 98).
- Configure SMTP Mail Server by IP or by Hostnames: Capable of resolving SMTP Mail Server's IP address by hostname automatically from DNS server.
- Multiple Email Sending Profiles: Use unique from, reply-to email addresses for each campaign.

Platforms and System Requirements

- Pentium class PC
- 128 MB RAM (256 MB /smtp server)
- 7MB free disk space
- Support Microsoft Windows 2000/NT4.0/Me/98/XP
- a SMTP server for email relay, e.g. Microsoft IIS, Microsoft Exchange, Lotus Domino, Linux SendMail
- TCP/IP (Internet) network connection
- Microsoft Data Access Components (mdac_typ.exe) v2.5 or above
- Microsoft Internet Explorer v4.7 or above (for HTML format email preview)
- For sending SMS, there must be a correct connection with internet and register on ITOK SMS server(www.meeteasy.com)

Download

You may download the latest version or service patches of MassEasy from http://www.masseasy.com.

Technical Support

If you have any question or problem that are not explained in this documentation, you may contact ITOK Technologies Limited for support. If you have a problem, please record all the details you can get us to help you.

Hotline: +852 2345-1562 (9am-6pm, HKG Time) FAX Number: +852 2566-5740 Email: <u>support@masseasy.com</u> Web: <u>http://www.masseasy.com</u>

2. Installing MassEasy

This chapter guides you how to install MassEasy and what pre-installation is needed.

Pre-Installation

MassEasy requires the following component installed to work properly. Microsoft Internet Explorer v4.7 or above.

If your machine has not installed these components, please follow the following steps to install them first.

Installation of Microsoft Internet Explorer

Download IE5.5 (ie5setup.exe) from http://www.microsoft.com

In Window Explorer or File Manager, double click on ie5setup.exe. Installation will start automatically.

Follow the step with the Installation wizard until the installation complete.

Service Account

For Windows NT, Windows 2000 and Windows XP users, please create a service account to install MassEasy.

Installation

- In Windows Explorer or File Manager, double click on **SETUP.EXE**
- All supported languages are showed in the installation wizard dialog. Choose the one you want to install.
- Select the MassEasy edition you wish to install.MassEasy Trial Edition is a full version of MassEasy but it has 30 days time limit. MassEasy Personal Edition does not have the time limit but some functions are restricted Both versions can be registered and upgraded to advance version.
- Read the License Agreement. Click "Agree" if you agree with the terms.
- Select MassEasy Components you wish to install, "Complete" or

" Custom" . " Complete" opt ion includes MassEasy Main Application, Help Documents and a free SMTP server-MailEnable. While the " custom" option only installs the components you choose to install Note: If you choose to install MailEnable, It will pop up a dialogue boxes requesting to restart the computer after MailEnable installation. Please ignore this dialogue box by pressing " Cancel" button and don't restart your computer until the end of MassEasy Installation.

- After copying the selected components, MassEasy would also upgrade data access component such as MDAC.
- After Installation, Please restart the computer.

3.Registration of MassEasy

Starting MassEasy first time will go through the following two steps:

- 1. User Information
- 2. Registration

User Information (Registration step 1 of 2)

This step involves the submission of registered user information. Registered users can receive updates of MassEasy information by email.

Fill in user information Click "**Next**" button

Users can skip the collection of user information by clicking the SKIP button. However, this Registration dialog appears at every startup of MassEasy.

development. Click SKJP but	ion and move to next	Latiop.
	First Name	Γ
	Last Name	[
Alass N	Company:	
	Country	Hong Kong S. A. R
	Email:	ſ
Care Viller	🔽 Keey no infi	armed news of MassEerr?
「三郎御	Emeil Formet	C Plain Jext
		e hter

Figure1.Registration step 1 of 2

Registration (Registration 2 of 2) This step involves Evaluation / License Registration with Online or Offline method.

Online Registration

- Input Serial Number for license registration or click the check box " Evaluation 1. Version" for evaluation version registration.
- Click " Online Registration" button. 2.
- 3. Wait for MassEasy to contact MassEasy.com and complete the registration.

Similarly, users can Skip this step by clicking SKIP button. Users skipping this registration step are using MassEasy Trial Edition. MassEasy Trial Edition has full features of Standard Edition but limited to 1 campaign 1 attachment and expires in 30 days.

Registration	gh Interes <mark>Kan</mark> te
NOTE: Please input your (format. MrE-XIX20-99999999 box Click SHIF to register late has limited functions	MassEasy Sorial number 9) in the following text er. Unregistered MassEasy
Serial Number:	
Serial Number:	Offline Registration

Figure 2. Registration step 2 of 2

- Offline Registration Input Serial Number for License registration or click the check box " Evaluation Version" for evaluation version registration.
- Click " Offline Registration" button.
- A text file MseReg.txt will be generated at <INSTALL PATH>\MassEasy.
- Send this text file by email to reg@masseasy.com or other methods.
- An activation key will return to user within 7 days through email.
- Click "Activation Key" button.
- Input the 16-digit Activation Key.
- Click "OK".
- Wait for MassEasy to complete the License Registration.



Figure3. Activation Key

4.Configuration of MassEasy

A SMTP Server is required as an email relay to send message to Internet. MassEasy supports Microsoft IIS, Microsoft Exchange Server, Lotus Domino, Linux SendMail and any SMTP compatible server.

Configure MassEasy SMTP settings by the steps.

- 1. Select from the top menu " Configuration > SMTP Server" or click the " Configuration" Button at the left Shortcut Menu.
- 2. Enter the SMTP Server host name or IP address.

N

Figure4. MassEasy Configuration

Control Email Transmission Rate

Email transmission rate can be controlled by the user. (e.g. User is allowed to send a maximum of 2000 emails in one hour)

- Control Email Transmission Rate by the following steps below. Select from the top menu " Configuration > Performance Tuning" or click the 1. "Configuration" Button at the left Shortcut Menu. Enter maximum email allowed to be sent per hour (at least 1 email and at most
- 2. 360000 emails)
- Press the Save button and restart MassEasy to apply new settings 3.

MassEosy Ele Configuration (pol): Feedbad	
Mass Simple, Yet Powerful Personalized Email Marketing Software for Better CRM	
Configuration Co	

Figure 5. Control of Email Transmission Rate

5. Preparation for MassEasy

Before sending a marketing campaign by MassEasy, some preparations work have to be done.

- 1. Prepar a Marketing Campaign
- Before creating & configuring a marketing campaign, user has to prepare the followings:

Data Source

User has to prepare the data source file or database system containing email list and personalized merge data (if any) for distribution. Below are the file types and database systems that are supported by MassEasy.

- ODBC connection (for Standard or Professional Edition ONLY) MassEasy can connect to any ODBC compatible system such as Oracle, MS SQL and MySQL to capture data source. The authorized login name and password are required to connect to the ODBC Database.
- Text (CSV) file- MassEasy supports text based data source file in the format of Comma Separated Variables (CSV).
- Microsoft Access file MassEasy supports Microsoft Access 97 or above version. The language of Microsoft Access Database File supported is depends on the OS of the machine. Microsoft Access Database File operated on different language of OS is not guaranteed.
- Microsoft Excel file If user would like to use an Excel file as data source, user must ensure that the format of the Excel file is in ODBC standard. An ODBC standard Excel file contains the Column name at the first row and a Name Label defining the area of data.

_	A	D	0	D		
- C	<u> </u>		V V	0		
1	ShopperID	Lname	Fname	Email	Tel	
	4	0	V Bullion	مشتق وما والتحديث	20005244)
4		30	VIVIAL	www.ansugabe.com	30303211	
З	2	Lau	Tony	tonyl98@398.com		
4	3	Fung	Wai	waifung@de.com	95687421	
5	4	Yu	Yu	yuyu1@xyz.com	98765432	
0						

Here is an example.

Figure6. Column Name / Field Name in Excel data source format

- 60	OKI					alud
iew	Inse	ert F <u>o</u> rmat	<u>T</u> ools <u>D</u>	ata <u>W</u> indow <u>H</u> elp	Deline Name	IX
B		<u>R</u> ows		🍓 Σ 🔹 👌 🛍 🔅	Names.in.goribook:	
		⊆olumns		D	TableName	OK
В		<u>W</u> orksheet		E F	Tobisharre 2	Trans I
		Chart				Close
	f _*	Eunction				édd
		<u>N</u> ame	•	Define		Oebbe
		Picture	•	Paste	1	- 20000
	٩	Hyperlink	Ctrl+K	<u>C</u> reate	-	
	-			Apply	Befers to:	
				<i>P</i>	=5heet11\$A\$1:\$E\$23	

Figure7. Define Name on Excel data file format

Content

Users is required to save marketing materials in the form of a Content Template. MassEasy supports email content in both HTML and TEXT formats, while SMS supports content in TEXT format.

HTML – Other than standard HTML tag, MassEasy also supports HTML file contains Javascript, asp and flash.

TEXT - Plain Text is supported by MassEasy as well.

Remark: The image in HTML file should be the absolute location accessed through Internet. (i.e. starting with http://)

6.Starting MassEasy

Start MassEasy and follow these steps below to complete a marketing campaign: 1.Create a Campaign Template

2.Create a Campaign Ten

3.Define a Campaign

4.Create a Task

5.Define a Task

Step1. Create a Campaign template

- 1. Click "**Template**" button on the left Shortcut Menu and click " New" or select " File > Te mplate> New" at top pull-down menu.
- 2. Enter a template name and click " OK" .(Duplicate template name is not allowed)
- 3. "Template Definition" window pops out.
- 4. The way to define a campaign template is the same as " Define a campaign", please refer to the chapter "Define a campaign" for more information. (Note: Defining Content in campaign template is a part of creating a template)

Step2. Create a Campaign

- Click "Campaign" button on the left Shortcut Menu and click "New" button below the Campaign List window or select at top pull-down menu " File > Campaign > New".
- 2. Enter a campaign name and select a send method. You can create a new campaign or create from the existing template.
- 3. The window " Campaign Definition" will prompt out.

Step3. Define a Campaign

In the Campaign Definition Window, you can find three tabs: Data Source, Content and Send Option. The Campaigns of Email and SMS are explained below:

The campaign definition for Email

3.1.1 Define Data Source

- Data Type (Mandatory) Select the Type of Data Source contains the Email List and/or Merge Data.(For the supported data source and details, please refer to Preparation for a Marketing Campaign).
 Database Path (Mandatory)
- Database Path (Mandatory) Choose the data file or DNS available on user's machine by clicking the button.

Table/Query Name (Mandatory)

Once the user has chosen the data file or DNS, MassEasy will check out all table names that are available from the data source. Select the one contains the Recipient's Email Address.

Recipient Field (Mandatory)
 Choose the Field Name which contains the recipient's email address.

Campaign Definition		×
Data Source Content 9	Send Options	Campaign 1
* Data Type :	Microsoft Access	
★ Data Path :	G:\ITOK\MASSEASY\TestingEmail.mdb	
* Table/Query Name :	SmallList	
* Recipient Field :	MBREMAIL	
No. of Recipients/Mes	isages Oueried : 8 Refresh Preview	
Data Filters :		
Field Name	Operator Value	
V	Y	
1	<< Prev. Next >> Sa	ve <u>C</u> ancel

Figure8-1 MassEasy Campaign Definition for Email

Recipient Field (Mandatory)

Choose the Column Name / Field Name which contains the recipient's email address.

• Number of Message

Once the Recipient Field has been provided, MassEasy checks the data source and shows the number of messages available for send.

Data Filters

Click the check box besides Data Filters will enable the data filters. Details for how to set the data filters will be discuss later in Advanced Feature – Data Filters.

3.1.2 Define Content

Subject

Enter email subject.

Content Format (Mandatory)

User may choose to send emails with content in HTML format or TEXT Format.

• Personalize with Merge Fields

Click the check box besides "Personalize with Merge Fields" to merge personalized data into content template for each recipient. Details for how to create a marketing material with personalized data will be discussed later in Advanced Feature – Personalize email message

• Configure Personalized Fields Mapping

After checking the check box " Personalize with Merge Fields", users can setup the existing personalized fields by clicking " Merger Fields Mapping". Users can specify which field in the data source merged with the personalized field in the template and set the maximum length.

Define Content (Mandatory)



is to

The button

select the source of content. It can be a file or defined content template. User can also preview the content in Text format and HTML format by clicking the tab. If user selects check box "Personalize with Merge Fields", then what you can see is the result after personalization. You can also browse all the personalized emails by clicking "Pre>> " and "Next".

mpaign Definition	×							
Data Source Content Send Options	Campaign 1							
Subject : Simple, Yet Powerful Personalized Email Marketing Softw								
* Content Format : C Plain Text C HTML								
Personalize with Merge Fields								
Define Content Preview As Text Preview As HTML								
* Content : G:\ITOK\MASSE\MsE20_public_html.htm								
<head> <thead> <thead> </thead></thead></head> <body bgcolor="#808080" topmargin="2"> <oiv align="center"> <table border="0" cellpadding="0" cellspacing="0" height="812" width="702"> <center> <tr> <td bgcolor="#006699" height="3" width="694"><img border="0" height="3<br"/>src="http://www.masseasy.com/Broadcast/index/kongbai.gif" width=27></td> <tr> <tr> <tr> <tr> <td bgcolor="#006699" height="67"> <img <br="" border="0"/>src="http://www.masseasy.com/Broadcast/index/kongbai.gif" width=27></td> <td bgcolor="#006699" height="67"> <img <br="" border="0"/>src="http://www.masseasy.com/Broadcast/index/top.jpg" width="702" height="67"></td><td>1</td></tr><tr><td>Attachments : Add Delete</td><td></td></tr><tr><td><pre><< Prev. Next >> Save</pre></td><td>Cancel</td></tr></tr></tr></tr></tr></center></table></oiv></body>	<img border="0" height="3<br"/> src="http://www.masseasy.com/Broadcast/index/kongbai.gif" width=27>	<img <br="" border="0"/> src="http://www.masseasy.com/Broadcast/index/kongbai.gif" width=27>	<img <br="" border="0"/> src="http://www.masseasy.com/Broadcast/index/top.jpg" width="702" height="67">	1	Attachments : Add Delete		<pre><< Prev. Next >> Save</pre>	Cancel
<img border="0" height="3<br"/> src="http://www.masseasy.com/Broadcast/index/kongbai.gif" width=27>	<img <br="" border="0"/> src="http://www.masseasy.com/Broadcast/index/kongbai.gif" width=27>	<img <br="" border="0"/> src="http://www.masseasy.com/Broadcast/index/top.jpg" width="702" height="67">	1	Attachments : Add Delete		<pre><< Prev. Next >> Save</pre>	Cancel	
<img <br="" border="0"/> src="http://www.masseasy.com/Broadcast/index/kongbai.gif" width=27>	<img <br="" border="0"/> src="http://www.masseasy.com/Broadcast/index/top.jpg" width="702" height="67">	1	Attachments : Add Delete		<pre><< Prev. Next >> Save</pre>	Cancel		
<img <br="" border="0"/> src="http://www.masseasy.com/Broadcast/index/kongbai.gif" width=27>	<img <br="" border="0"/> src="http://www.masseasy.com/Broadcast/index/top.jpg" width="702" height="67">	1	Attachments : Add Delete		<pre><< Prev. Next >> Save</pre>	Cancel		
<img <br="" border="0"/> src="http://www.masseasy.com/Broadcast/index/kongbai.gif" width=27>	<img <br="" border="0"/> src="http://www.masseasy.com/Broadcast/index/top.jpg" width="702" height="67">	1	Attachments : Add Delete		<pre><< Prev. Next >> Save</pre>	Cancel		
<img <br="" border="0"/> src="http://www.masseasy.com/Broadcast/index/kongbai.gif" width=27>	<img <br="" border="0"/> src="http://www.masseasy.com/Broadcast/index/top.jpg" width="702" height="67">	1						
Attachments : Add Delete								
<pre><< Prev. Next >> Save</pre>	Cancel							

Figure8-2. MassEasy Campaign Definition For Email

Attachments

Click "File" button besides the Attachments to add file(s) as attachment sent with email messages. You can also click on the pull down manual to choose an attachment template, users also can save the selected content as a "attachment template". If you want to remove the selected attachment, what you need to do is to click "Delete" button to remove it. The no. of attachment allowed to be sent is depends on the MassEasy edition you are using. Notes: Any binary files can be added as attachment.

Disclaimer

Click "Disclaimer ... "button to edit the content of Disclaimer to be sent. User can choose to send disclaimer as header or footer with the message content. Disclaimer can only in Text Format. The permission of changing content and position of the disclaimer is depending on the MassEasy edition you are using.

3.1.3 Define Send Options

Sender Name

Enter Sender's Name which will be display as "Sender" in email messages

Sender Email (Mandatory)

Enter Sender's Email Address.

Reply To

Enter a email address you would like recipients to reply to. If this field is mitted, the sender email address will be set as default Reply To email address.

Send Acknowledge Email To

Input an Email Address where an acknowledge email will be send to after a task completed. The email contains a simple task report summarizing how many emails have been sent out successfully. Click "add" button to add multiple recipients.

The campaign definition for SMS

3.2.1 Define Data Source

- Data Type (Mandatory)
 Select the Type of Data Source contains the mobile numbers List and/or Merge Data. (For the supported data source and details, please refer to Preparation for a Marketing Campaign).
- Database Path (Mandatory)
 Choose the data file or DNS available on user's machine by clicking the
 button

button .

Table/Query Name (Mandatory)

Once the user has chosen the data file or DNS, MassEasy will check out all table names that are available from the data source. Select the one contains the Recipient's mobile numbers.

Recipient Field (Mandatory)

Choose the Field Name which contains the recipient's mobile numbers.

Campaign Definition - SMS		×
Data Source Content Se	nd Options	Send_By_SMS
* Data Type : * Data Path :	[SELECT BELOW]	
 * Table/Query Name : * Recipient Field : 	[SELECT BELOW]	
No. of Recipients/Mess	ages Queried : 0 Refresh Preview Hona Kona H+852	
Data Filters : Field Name	Dperator Value	
	<< Prev, Next >>	Save Cancel

Figure 8-3 The campaign definition for SMS

Number of Message

Once the Recipient Field has been provided, MassEasy will check the data source and show how many messages is available for distribution.

• Country or Region Code

Every Country or region has its unique prefix dialing code. Select a country or a region to specify where the recipient are in the campaign.

Data Filters

Click the check box besides Data Filters will enable the data filters. Details for how to set the data filters will be discuss later in Advanced Feature – Data Filters.

3.2.2 Define Content

• Personalize with Merge Fields

Click the check box besides Personalize with Merge Fields to merge personalized data into content template for each recipient. Details for how to create a marketing material with personalized data will be discussed later in Advanced Feature – Personalize email message.

• Configure Personalized Fields Mapping

After checking the check box "Personalize with Merge Fields", users can setup the existing personalized fields by clicking "Merger Fields Mapping". Users can specify which field in the data source merged with the personalized field in the template and set the maximum length.

Define Content (Mandatory)



the source of content. SMS content support files or templates in TXT format only. If user selects check box "Personalize with Merge Fields", then what you can see is the result after personalization. You can also browse all the personalized emails by clicking "Pre>> " and "Next"

Figure9 The campaign definition for SMS

Disclaimer

Click "Disclaimer ..." button to edit the content of Disclaimer to be sent. User may choose to send the disclaimer as header or footer with the message content. Disclaimer can only be in Text Format.

3.2.3 Send Options

Sender Name

Enter Sender's Name and it will be displayed in SMS Sender's field

Sender mobile number (Mandatory)

Enter Sender's mobile number and it will be displayed in the SMS

Send Acknowledge SMS To

Enter a mobile number which an acknowledge SMS will be sent to after a task completed. The SMS contains a simple task report summarizing the no. of SMS have been sent out successfully.

Login ID and Password You can get a login ID and password in the ITOK SMS server (www.meeteasy.com). SMS task can't be completed unless there is enough balance in the account.

Step4.Create a Task

After defining a Campaign, user can schedule a Task to be executed at specified date/time. It applies all current Campaign settings e.g Data Source, Content, and Send Options to the task created.

- Click "Task (Scheduled)" button and click "New" button below the Task List window or select at the top pull-down menu "File > Task > New".
- Task Definition Window will pop out.

Once the task has been created from one Campaign, the changes in that Campaign will not take effective on the task created. (No matter it is scheduled task or immediate task.) User is needed to create another new task in order to apply the new changes in that Campaign.

Step5.Define a Task

Campaign

Select the Campaign that the Task scheduled from.

 Task Name Enter a Task Name.

Send Time of a Task

Select the Task is need to send immediately or at scheduled time by clicking the appropriate option.

Select the Date and Time for a scheduled Task.

Data Capture Mode

User can select a scheduled task take Immediate Data from the data source or capture data at the Scheduled Time

Immediate Data – For a scheduled Task with Immediate Data, MassEasy will import the email list and personalize data from data source when the task created.

Scheduled Data – For a scheduled Task with Scheduled Data, MassEasy will import the email list and personalize data from data source at the scheduled time.

Task Definition
Campaigns : Campaign 1
Task Name :
Send :
Immediate C At Scheduled Time
Schedule Date/Time :
 ✓ October 2002 →
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 20 29 30 31
Today
Time : PM 06:42:11
Data Capture Mode :
Immediate Data C Scheduled Data
Create Cancel

Figure10. MassEasy Task Definition

7.Advanced Feature in MassEasy

Task Manipulation

MassEasy provides several manipulations for each task such as Reschedule, Restart, Resume, Stop, Cancel and View Log for a task.

Reschedule

User can click the button "View Log" to view the result of the task, no matter the task is completed or not. (Note: Except at the moment the task is completing, i.e while the log is written. In that case, users have to wait for a few seconds)

Restart

User can restart a stopped task and pending task. The whole task will be resent from the beginning of the mailing list.

Resume

User can resume a stopped task and pending task. The task will be resent from last stopped point of the mailing list. Only those un-sent email addresses will be sent.

Stop

User can stop a running task or a scheduled task.

Cancel

User can cancel a scheduled task or a pending task. Once the task is cancelled, it can not be restart or resume again.

View Log

For a completed task, user may click the button "View Log" to view the distribution result of the task.

Database Filter

When distributing marketing material, user may want to segment their target customers with tailor-made content.. MassEasy provides a basic database filter for this purpose. User only needs to specify the field and input the required value.

For example, a user wants to send message only to those recipients who aged 30 or above. Follows these steps to set up the Data Filters:

- 1. Click the check box beside " Data Filters" and enable the database filter to work.
- 2. Select the Field Name in the selection box that contains the age of receiver.
- 3. Select the operator " >=" in this case.
- 4. Input the required value 30 into the value column.
- Click button ⁱ Refresh". The number of message that meets this requirement will be reflected immediately at No. of Recipients /Messages Queried.
- 6. User may also click button " Preview" to view the data records that meet this requirement.

No. of Recipients/Messages Queried : 139 Refresh Preview		
🔽 Data Filters :		
Field Name	Operator Value	
Age 💌	>= 💌 30	•

Figure11.MassEasy Database Filters

7. Users can click the check box of "filter repeated recipients". The repeated email or mobile number will be sent just once.

Remarks:

- 1. The information of criteria field should be contained in the same table / view of receiver email address/mobile number.
- 2. When the required Value is a string, a "" is needed to quote the value. (Example: 'Hong Kong')
- 3. User can set up to five criteria for data filtering.
- Personalize with Merge Fields MassEasy supports user to send recipient message with personalized information.

User just need to click the check box beside Personalize with Merge Fields when defining Content in Campaign Definition and add Merge Field(s) into the Content Templates.Follow these steps to add token(s) into materials:

- 1. Open the marketing material with editor.
- 2. Move the cursor to where the personalized information will be added.
- 3. Type in the exact Field Name which containing the personalized information and quote it with " {#%" and "%#}".
- 4. Example:

Dear {#%ShopperName%#}, We are appreciate to tell you that...

Where ShopperName is the field name that contains the data of shopper name. When the message send out to the recipient, it would be replaced by the data of shopper name provided.(refer to Point5 for reference.)

5. Users can also modify the corresponding field of personalized information when defining or editing the campaign. Click " Configure Personalized Fields Mapping" in the " Content" page, and then select the corresponding field in the database. It also allows to set the maximal length. MassEasy will replace the personalized field according to the user's configuration when it is merging. If there is no configuration of these fields mapping, MassEasy will process as what Point 4 described.

Recovery / Resumption Mode

When a Task is running and MassEasy has been stopped, un-completed tasks will be recovered. MassEasy enable user to resume these tasks and continue the task from the dead point. MassEasy provides two options for task resuming.

Auto Resume

When MassEasy start, it checkes if there is recovered task in the task list. MassEasy will continue to send the outstanding email automatically.

• Resume with user confirmation

When MassEasy starts, it will check if there is recovered task in the task list. MassEasy will ask the user if he/she would like to resume these tasks, reschedule the task or cancel the task.

User can change the mode of Resumption by clicking the Configuration button and select the tab " Options" or select from the top menu " Configuration > Options".

Select Format of Graphics for sending

There is a check box for users to choose the sending format of embedded graphics in the Email. Take Microsoft Outlook Express and Microsoft Outlook 2000 as examples to explain as follows:

Sending Format of Graphics	Microsoft Outlook Express	Microsoft Outlook 2000
Don't send as standard attachment	display normally	the whole email would be treated as attachment
Send as standard attachment	Can display the content and pictures, but all the pictures will be in the attachment box so that the recipient can't distinguish which ones are added by the sender.	Display normally, only attachments the sender added will be displayed in the attachment box.

These procedures only apply if you have installed Outlook with the Corporate or Workgroup option. This option allows you to use Messaging Application Programming Interface (MAPI) services. To determine your installation type, on the Help Menu click About Microsoft Outlook. In About Microsoft Outlook you should see "Corporate or Workgroup" if you have the Corporate or Workgroup installation.

Illustration: The problem mentioned above which possibly happened in Microsoft Outlook 2000 will happen just in the following case:

"Microsoft has confirmed this to be a problem in Microsoft Outlook 2000", which has been mentioned in this file.

MassEasy strongly suggest that all the pictures in emails in HTML format use "absolute path", i.e in the format of http://" or "https://". If it has to use embedded graphics, MassEasy will advice you to click the check box of "send embedded graphics as standard attachment".

• Compress database

Users can configure MassEasy to compresses the database when it reaches to XXMB, the compression always does in the next startup of MassEasy. The database is the internal database of MassEasy and the storage efficiency would be increased by compressing database.,

8. Troubleshooting

Here are some questions you may ask:

 Why can't MassEasy find any email record in Excel (*.xls) Data Source file when I defining the Data Source for a Campaign? Ans: It is because a Name label in Excel (*.xls) Data Source file is need in order to enable the connection driver to recognize the valid data source. For details,

you may refer to 5. Preparation for MassEasy.

- Why can't the personalized data in email content be displayed even if I have already click the "Personalized with Merge Fields" option?
 Ans: Make sure the merge field name in you content template is exactly the same with those in the data source table. For details, you may refer to : Personalize with Merge Fields.
- Why most of the response code are "554" Transaction failed" when I view the log for a completed task?
 Ans: It may because of the insufficient capacity of SMTP Server. You may tune the performance by setting a smaller value for the option " No. of SMTP Connections" in Configuration Setting.
- I sent emails (in HTML format) by MassEasy, why did some recipients say that they received an attachment named "untitled.eml" Ans: Maybe the picture format you set is incorrect. Please refer to "Advanced Features"-" Select Sending Format of Graphics"
- 5. Does the completion of the task in MassEasy means all the emails or SMS have been sent successfully? Ans: For SMS, the completion of the task is the completion of sending, users can view the log to check the status. But for Email, the completion of the task only means that MassEasy successfully submitted all the information to the SMTP server, which will do proper broadcast according to the configuration and network performance.
- Why can't I send SMS by MassEasy?
 Ans: Please make sure that you have correctly connected to internet and registered in our SMS server. Then check your login ID and password and if there is enough balance to send SMS. You can view the log of failed tasks to get more details or contact to our technical support.