



practice track *online*

The Website Solution for Accountants

Mailshot Manager User Guide

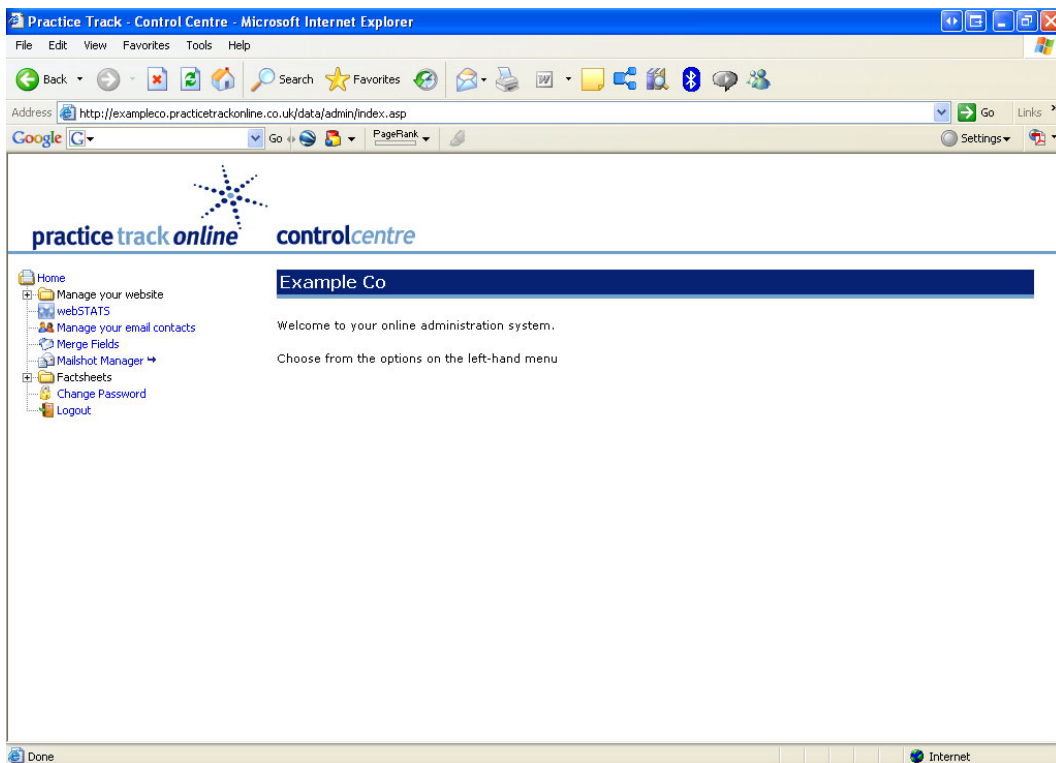


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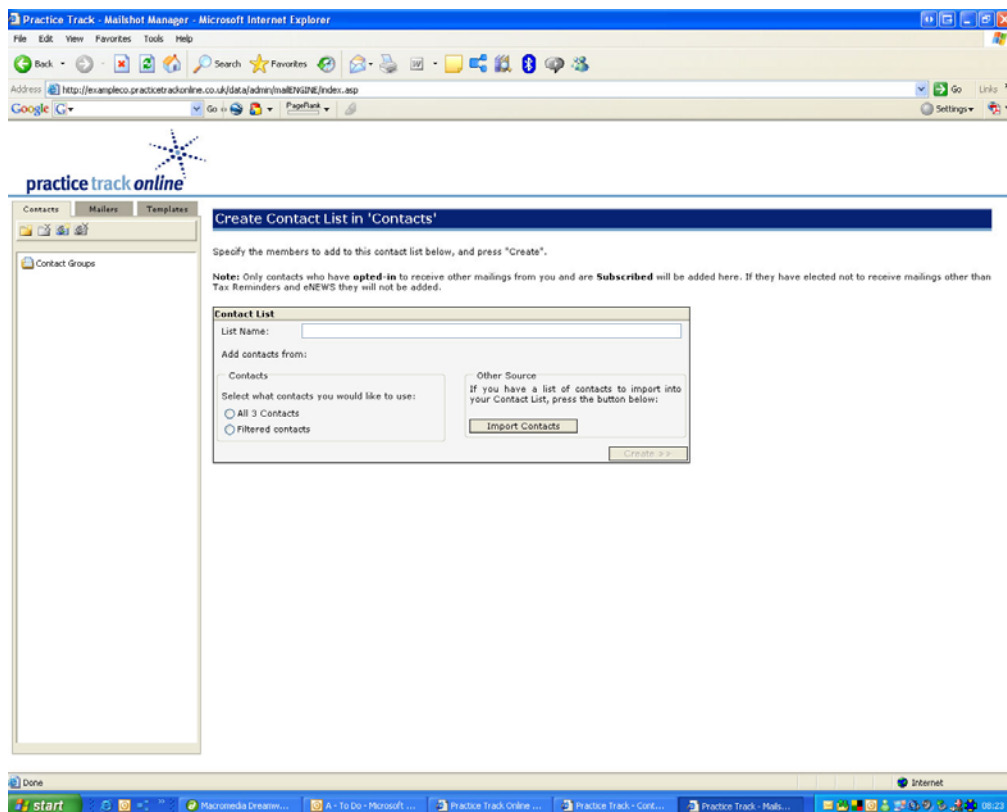
1 ACCESSING Mailshot Manager

- Go to www.practicetrackonline.co.uk
- Click on "Client Login" in the left hand menu
- Enter your username and password as supplied when your website went live. If you have misplaced this information then email support@practicetrackonline.co.uk for these details.
- Click on Mailshot Manager in the left hand menu.



2 CREATING A CONTACT LIST

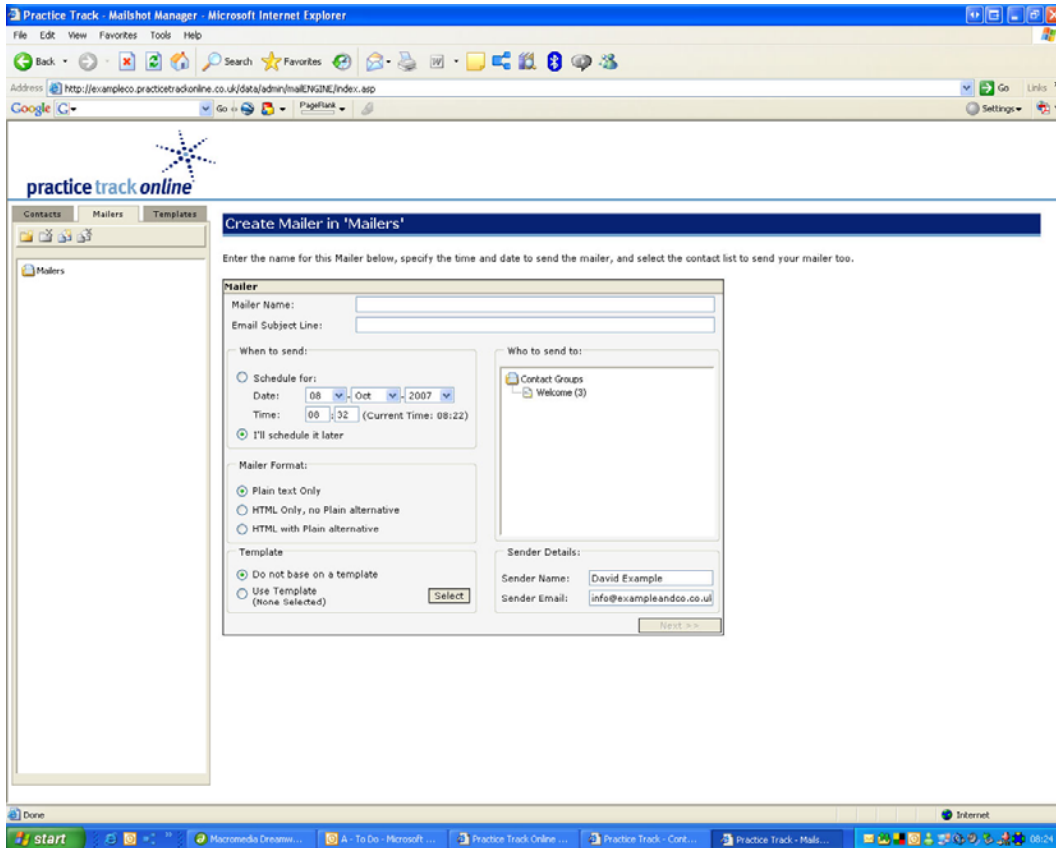
- Having logged in, make sure the contacts tab is highlighted
- Click on “Create Contact List” (the third button along) 
- Give your contact list a suitable name in the “List Name” field
- You can then import your contact list from “Manage Your Email Contacts”
- You can import the full list or filter it down. If you select filter then click next and you will be given the filtering options. If you do not wish to filter it then click on All contacts and click next, and your contacts from “Manage Your Email Contacts” will be imported
- You can also choose to import a separate list (note this will import this new list into “Manage Your Email Contacts”)
- If you have set-up groupings for contacts within “Manage Your Email Contacts” then you can pull contact lists through by groups by clicking on filtered contacts, click next and then filter by category.




3 EDITING A CONTACT

- Having logged in, make sure the contacts tab is highlighted
- Click on the contact list you wish to edit in the left hand menu
- Find the contact you wish to edit and click on their name
- Edit the details as required and click update (note that the update made here will link through to "Manage Your Email Contacts" and update the contact's record)

4 CREATING A MAILER



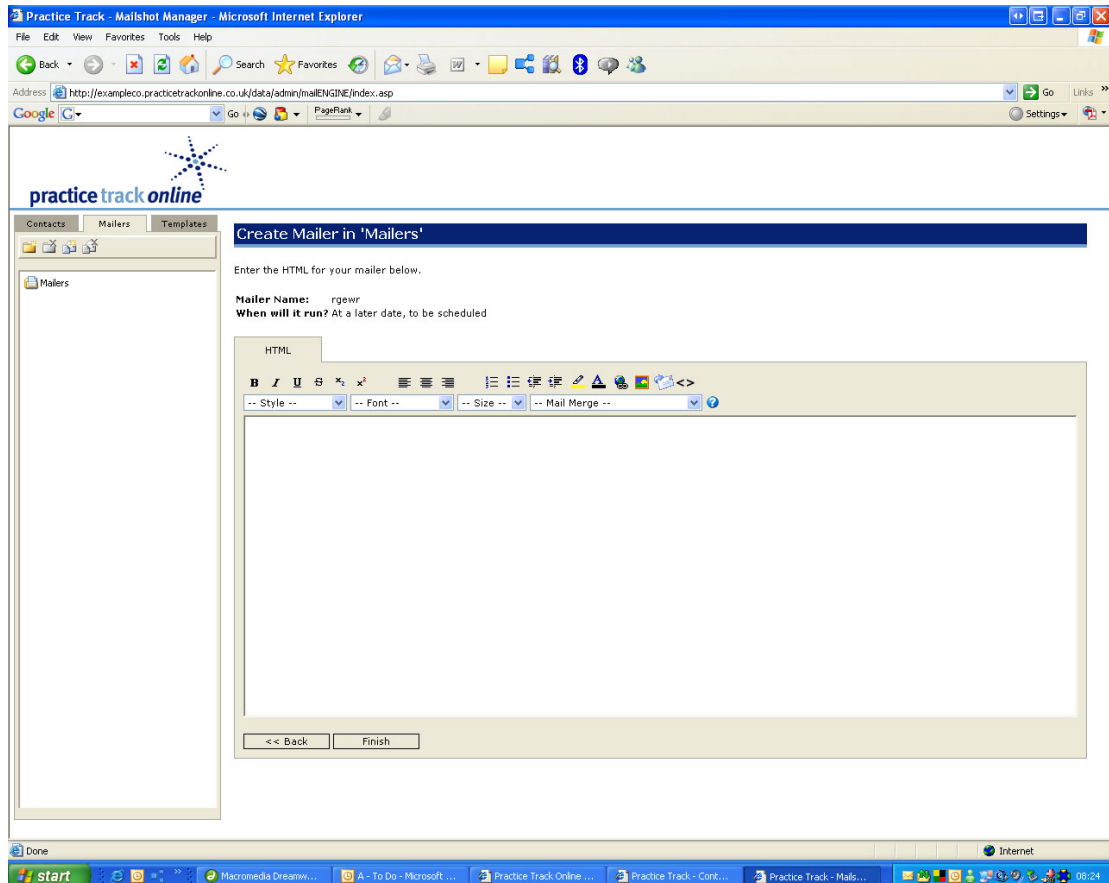
- Having logged in, click on the mailers tab
- Click on the Create Mailer button (the third button along) 
- Give the mailer a name
- In the "Email Subject Line" enter the text that you want to appear as the email subject
- You can schedule the email now or do this later. We suggest that for most of your mailers you schedule it later to give you opportunity to thoroughly test your mailer
- You can choose to send the email as plain text or HTML with plain text alternative.



If you choose plain text then you will be unable to do any formatting within the email, but this format is more likely to be delivered to the end user.

We suggest that in most cases you choose "HTML with plain text alternative", this will allow you to set up 2 templates, one being a formatted HTML email and the other being a plain text email. Our system will always try to deliver an HTML email, but if the recipient's systems are set-up not to receive HTML emails, then the system will intelligently recognise this and send a plain text email instead.

- You can base the email on a template (see 8)

- Choose the mailgroup you want to send this mailer to in the “who to send to” field by clicking on the list required
- You can then add / edit the senders name and email address – these are the details that will appear in the “from” fields of the email, and the email address they will reply to
- Click next




- You can design your mailer
- In the HTML tab you can add your content and format it as necessary. A good idea for this is to create your content in Word and then copy and paste this text into the template.
- Note that this mailer is writing HTML, so if you want to create a single line break then press shift and return, if you want to create a double line break then click return.
- If you wish to copy HTML directly into this mailer then click on the  button and this will take you to the HTML view. Note that you need to click on this button again to return to the normal view and be able to save your mailer.
- If you wish to add an image to the mailer, then click on the image button . You now have 3 choices:
 1. If you know the url of an image you want to add to the template then enter this in the field provided and click ok. This will link your mailer to the image.

2. If you have an image on your PC you want to add then click on library. Here you can upload images and save them as a library. There is an image size restriction of 50kb per image. This is to avoid users uploading large images and using unnecessary bandwidth.

3. If you would like to lift an image from a web page then click on locate. Add the address of the web page you want to lift the images from and click find. You will then be shown a table containing all the images on that page. Click on the image you require and the url of that image will be added to the insert image field. Then click ok to insert the image.

- You can merge in your recipients details into the mailer (eg Dear John,). To do this click on the mail merge drop-down menu and choose the field you wish to merge in. Make sure you leave the brackets around this field to ensure that this field merges properly.
- Now click on the plain text tab and add in the same text, but in plain text format.
- Click "update".

5 TESTING A MAILER

- It is important to test a mailer before you send it out
- Having logged in, click on the mailers tab
- Find the mailer you wish to test and click on the design button
- Click on the test e-mail template button  and enter your email address
- This will send you a copy of your email that you can check thoroughly

6 EDITING A MAILER

To edit the mailer properties:

- Having logged in, click on the mailers tab
- Find the mailer you wish to test and click on the edit button
- Change the properties as required
- Click update


To edit the mailer design:

- Having logged in, click on the mailers tab
- Find the mailer you wish to test and click on the design button
- Change the design / text as required
- Click update

7 SCHEDULING A MAILER

- Having logged in, click on the mailers tab
- Find the mailer you wish to schedule and click on the schedule now button
- Specify the date and time you wish it to go and click finish

8 USING TEMPLATES

- Having logged in, click on the templates tab
- Click on the Create Template button (the third button along) 
- Give your template a name and design your template
- Then when you create a mailer you can use this template as a basis for your email design by clicking on the use template options in the mailer properties (see 4)

9 SUPPORT

When you need support from us simply email support@practicetrackonline.co.uk. These support questions could be:

- Uploading your contact list
- Changing your email templates
- Switching on / off a service within your site
- Advice / ideas on how to make the most of Mailshot Manager

We will process your support requests within 2 working days, and let you know when they've been answered / completed.

If you'd like to subscribe to a new service, or increase your contact upload limit (this is 1,000 by default) then simply email support@practicetrackonline.co.uk.