

User Manual

Inxmail Professional Mailing Upload Plug-in



Version: PLUGMAIL-A-EN-15-1.1

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1 About this document

Release

This document relates to the following releases/versions:

- Inxmail Professional 4.4
- Mailing Upload plug-in 1.2.0.2

Target group

This document is intended for users of the Mailing Upload plug-in in Inxmail Professional.

Special information

The following terms are used to draw your attention to special information.

Term	Explanation
Important	Care should be taken here. You should make every effort to observe the information in this section.
Note	Here you will find tips that can make life easier for you.
Example	This section provides example procedures or example data to help guide you.

Structure of individual chapters

The individual chapters typically consist of the following sections:

Section	Content
Prerequisites	This section sets out the conditions that must be met in order that a particular task may be performed.
Step by step	This section guides you step by step through the application until you have completed your task.
Additional information	Here you can find further information that is relevant to the task being performed.
Related topics	Here you will find a tabular listing of topics that are related to the task being performed.

Typographic conventions

The formatting options listed below draw your attention to the following:

Formatting	Use
<i>User interface</i>	<i>Words that appear in this style relate to elements of the Inxmail Professional user interface.</i>

Code	Text that appears in this style represents program code.
Entries Selections	Words that appear in this style are to be entered in input fields. In the case of selections, you must select the value that appears in this style.

User interface

This document describes the application based on the Microsoft Windows user interface.

Additional information and documents

For a detailed description of the functionality of Inxmail Professional, see the Inxmail Professional User Manual and online help. The User Manual is supplied with Inxmail Professional as a PDF document. It is also available for download from the Inxmail Community at <http://community.inxmail.de>.

The Inxmail Community offers a range of other documents for Inxmail Professional users, including how-tos and documents for administrators such as installation manuals.

2 Introduction

The Inxmail Professional Mailing Upload plug-in allows you to directly upload the source code of existing (promotional) mailings to Inxmail Professional and turn it into an HTML mailing through a series of steps.

The straightforward workflow guides you through the configuration of your mailing in a quick and simple manner. Existing images and links can be adjusted in a visual editor and provided with link tracking. The clearly structured configuration reduces the additional work and potential error sources associated with the manual reworking of links and images.

When the HTML mailing has been completed, it is stored in the Inxmail Professional Mailings agent where it can be further edited and sent.

3 Installation

3.1 Installing the plug-in

Step-by-step

1. Open Inxmail Professional.
The Cockpit appears.
2. Select the tab  (*Global settings*).
3. Click on the agent  *Plug-ins*.
The overview of the installed plug-ins appears.
4. Click on  *Install plug-in*.
The dialog box *Install plug-in 1/3* appears.

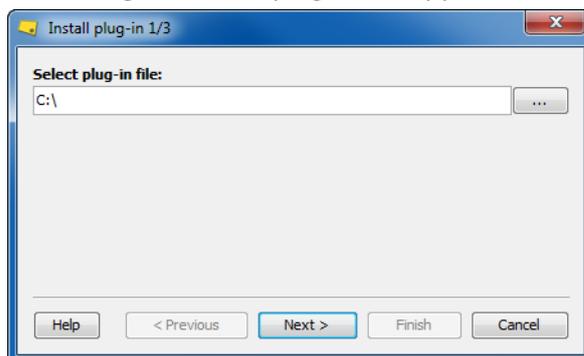


Figure 1: 'Install plug-in 1/3' dialog box

5. Select the IPD file on your machine.
6. Click on *Next*.
The dialog box *Install plug-in 2/3* appears.

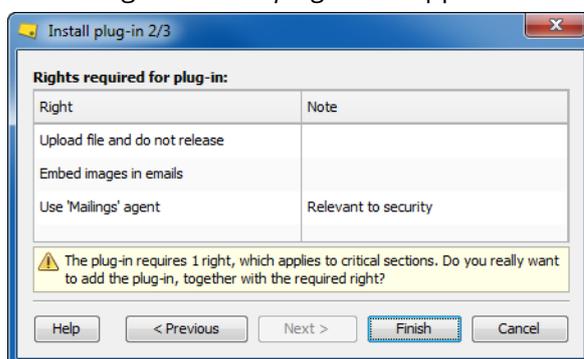


Figure 2: 'Install plug-in 2/3' dialog box

7. Click *Next* to confirm that the plug-in can be installed with the displayed rights.

The dialog box *Install plug-in 3/3* appears.

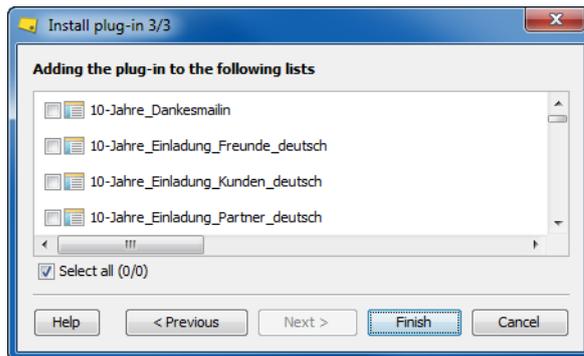


Figure 3: 'Install plug-in 3/3' dialog box

8. Confirm the list selection of the plug-in and finish the installation process by clicking *Finish*.
 9. The overview of the installed plug-ins appears.
 10. Click the *Released lists* tab.
 11. Enable the *Only release the list from which the plug-in is opened* option.
- ✓ You have finished installing the Mailing Upload plug-in.

3.2 Configuring the plug-in

Step-by-step

To configure the plug-in, proceed as follows:

1. Click the  *Plug-ins* agent on the  *Global settings* tab.
All installed plug-ins are displayed.
2. Select the desired plug-in with a single click.
3. Click the  *Configure plug-in* button on the toolbar.

Alternatively, you can open the plug-in configuration using the context menu (right-click).
The *Configure plug-in* dialog box is displayed.

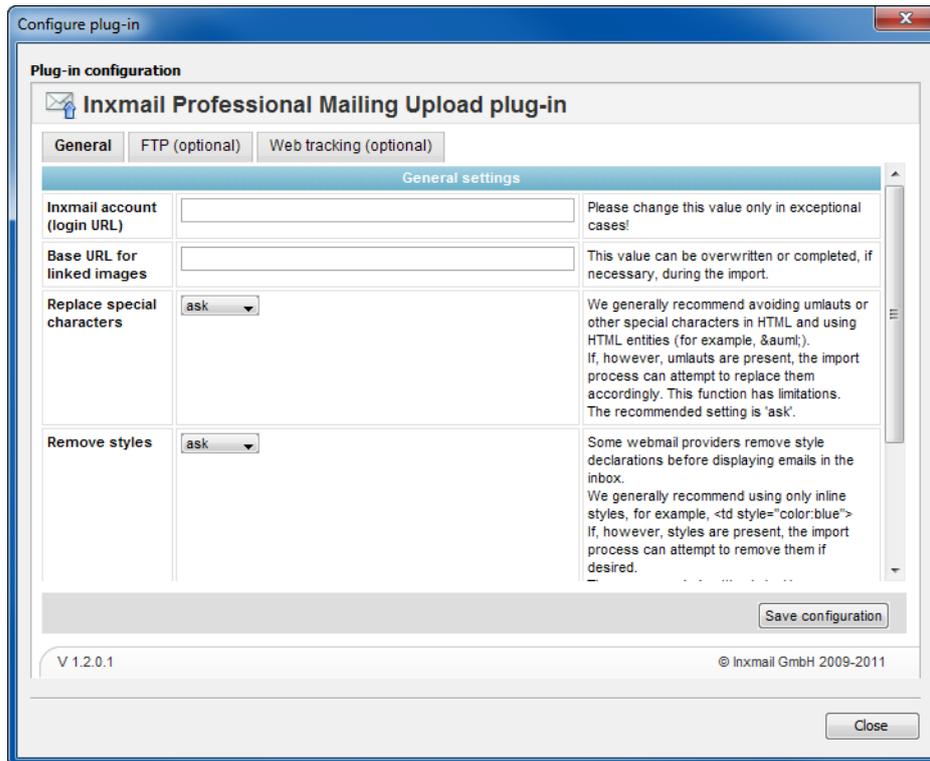


Figure 4: 'Plug-in configuration' dialog box

- Specify your settings in the fields on the *General* tab.
Settings on the General tab

Configuration option	Description
Inxmail account (login URL)	The login URL of your Inxmail client is entered here. Note Only change this value in exceptional cases!
Base URL for linked images	Enter a base URL for your linked images, if necessary. This value can be overwritten or completed during the import.
Replace special characters	It is generally recommended not to use any German umlauts or special characters in HTML mailings. Choose whether special characters are to be replaced during the import. The recommended setting is ask.

Remove styles	<p>Only use inline styles, for example, <code><td style = "color:blue"></code>, if possible.</p> <p>Many webmail providers remove style declarations before displaying emails in the inbox. If, however, styles are present, they can be removed during the import.</p> <p>The recommended setting is <i>ask</i>.</p>
Remove HTML, HEAD and BODY tags	<p>Many webmail providers display only the content of the BODY tag. You can remove everything but the content of the BODY tag during the import.</p> <p>The recommended setting here is <i>never</i>, unless the emails are read exclusively via webmail.</p>
Automatic name for links	<p>The plug-in can be configured to generate name suggestions for links, which then appear in the <i>Name in the report</i> field. If you want to work with these name suggestions, select the <i>Yes</i> option. The names are automatically entered in the field as HTML Link 1, HTML Link 2, and so on. You can overwrite the names during the mailing upload.</p> <p>If, on the other hand, you prefer to have empty input fields, select the <i>No</i> option. In this case, you need to enter your own name in the <i>Name in the report</i> field for every link.</p> <p>The recommended setting is <i>Yes</i>.</p>

- Click the *FTP (optional)* tab if you would like to use an FTP server.

Settings on the FTP (optional) tab

Configuration option	Description
Use FTP?	<p>Select whether you want to transfer images from the uploaded ZIP files to an FTP server.</p> <p>The recommended setting is 'ask'.</p>
Address of the FTP server	Enter the address of your FTP server, if necessary.
Login for the FTP server	Enter the login for the FTP server.
Password of the FTP server	Enter the password for the FTP server.
Base path on the FTP server	Enter the base path on the FTP server. This value can be overwritten or completed during the import.

- Specify your settings in the fields.
- Click *Connection test* to test the specified FTP server.
- Click the *Web tracking (optional)* tab if you want Web tracking parameters to be added to existing links.

Configuration option	Description			
Activate Web tracking	<p>Enable this option if you want Web tracking parameters to be automatically added to existing links.</p> <p>The recommended setting is 'ask'.</p>			
Parameter coding	Select the character set encoding expected by the target Web page from the drop-down list.			
Type	<p>Select a tracking type from the drop-down list. The parameter input behaves dynamically according to your selection.</p> <p>Note Use one of the two Econda tracking types if you use the Inxmail Conversion Tracker.</p> <p>Tracking parameters</p> <p>Select this value for Web tracking tools.</p> <p>Enter the name of the parameter expected by your Web tracking tool under <i>Parameter</i>.</p> <p>Enter the corresponding value for the parameter under <i>Value</i>.</p> <p>You can freely choose the values or determine them from an Inxmail variable.</p> <p>Note You can copy the most important Inxmail variables over from the drop-down list by clicking the arrows.</p> <table border="1"> <tbody> <tr> <td> <p>Econda Web analytics Standard</p> <p>Use this value for Magento and Oxid online shops.</p> </td> <td rowspan="2"> <p>Über diese Felder wird der Wert für den variablen Trackingparameter <code>newsletter</code> festgelegt. Dieser Wert besteht aus drei Bestandteilen. Sie können die voreingestellten Werte übernehmen oder manuell überschreiben.</p> <ul style="list-style-type: none"> • Campaign level 1 (week) • Campaign 2 (mailing) • Campaign 3 (link) </td> </tr> <tr> <td> <p>Econda Web analytics Websale</p> <p>Use this value for Websale online shops.</p> </td> </tr> </tbody> </table>	<p>Econda Web analytics Standard</p> <p>Use this value for Magento and Oxid online shops.</p>	<p>Über diese Felder wird der Wert für den variablen Trackingparameter <code>newsletter</code> festgelegt. Dieser Wert besteht aus drei Bestandteilen. Sie können die voreingestellten Werte übernehmen oder manuell überschreiben.</p> <ul style="list-style-type: none"> • Campaign level 1 (week) • Campaign 2 (mailing) • Campaign 3 (link) 	<p>Econda Web analytics Websale</p> <p>Use this value for Websale online shops.</p>
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<p>Econda Web analytics Websale</p> <p>Use this value for Websale online shops.</p>				

9. Specify your settings in the fields.
 10. Then click 'Save configuration'.
- ✓ You have finished configuring the plug-in.

4 Uploading a mailing

In the following you will learn how to upload the source code of a (promotional) mailing to Inxmail Professional.

4.1 Step 1: Upload file

Step-by-step

1. Open a mailing list.
2. Click the  *Mailing Upload plug-in* agent.
3. The *Mailing Upload plug-in* is started.
4. Click *Browse* to select a file.
5. The *File Upload* dialog box is displayed.

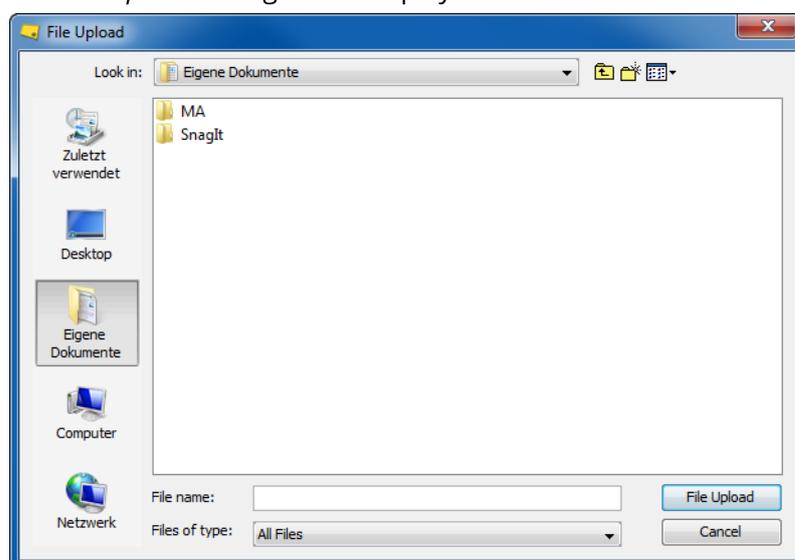


Figure 5: 'File Upload' dialog box

6. Select a file.
The following file formats are supported:

File format	Description
ZIP	A ZIP file normally contains an HTML file, a TXT file (optional) and a folder with referenced images.
HTML	Images cannot be embedded in the case of a pure HTML file (*.html or *.htm).
TXT	The plug-in offers only minor benefits for pure TXT/plain files.

7. Then click *File Upload*.

You return to the *Mailing Upload plug-in*.

8. Click *Next*.

This directs you to Step 2 of the *Mailing Upload plug-in*.

4.2 Step 2: Editing the imported file

In Step 2, you edit the uploaded file. Use the tabs to switch to the individual editing steps.

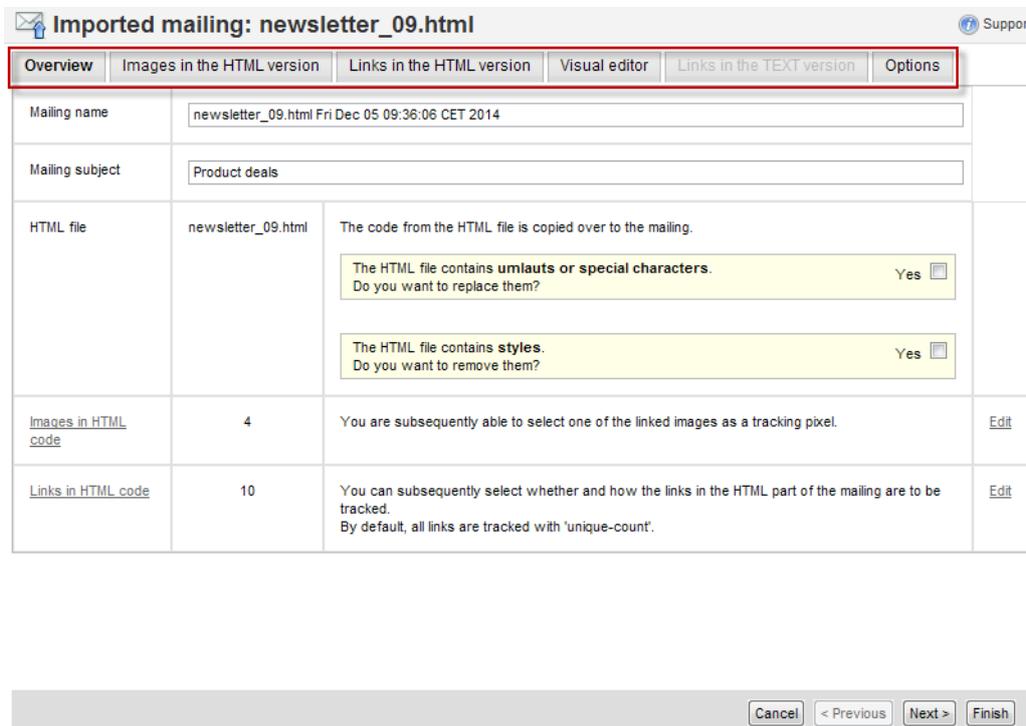


Figure 6: Editing steps in the Mailing Upload plug-in

4.2.1 Overview

The basic information on the uploaded file is recorded on the *Overview* tab.

Information	Description
Mailing name	The <i>Mailing name</i> field contains the file name of the uploaded file along with the date and time of the mailing upload.
Mailing subject	The subject of the mailing is recorded in the <i>Mailing subject</i> field.

HTML file/TEXT file	The file name of the uploaded file is displayed here.	<p>If this is a pure text file then the text is copied over to the mailing.</p> <p>If this is an HTML file then the code is copied over to the mailing.</p> <p>Special characters can be replaced or styles can be removed for HTML mailings, depending on the configuration setting within plug-in administration.</p> <hr/> <p>Umlauts or special characters</p> <p>Enable the check box if existing German umlauts and special characters are to be replaced.</p> <hr/> <p>Styles</p> <p>Enable the check box if existing styles are to be removed.</p>
Images in HTML code	The number of existing images in an HTML or ZIP file is displayed here.	<p>Click <i>Edit</i> if you want to select one of the linked images of the HTML file as a tracking pixel. You are directed to the <i>Images in the HTML version</i> tab.</p> <p>Click <i>Edit</i> if you want to link or embed images from the ZIP file. You can also select one of the linked images as a tracking pixel.</p> <p>If the HTML file contains relative paths for images then you must enter the base URL in order that the path for the newsletter may be completed.</p>
Links in HTML code/in the TEXT file	The number of existing links is displayed here.	<p>Click <i>Edit</i> if the links in the HTML/text part of the mailing are to be tracked. You are directed to the <i>Links in the HTML version</i> tab.</p> <p>All links are tracked with 'unique-count' as standard.</p>

Click *Next* to switch to the *Images in the HTML version* tab.

4.2.2 Images in the HTML version

All of the images referenced in the file are displayed on the *Images in the HTML version* tab. Images that come from a ZIP file can be either linked or embedded. Hover the mouse over the file path to obtain a small preview of the image.

Select tracking pixel

You can provide one of the referenced images with a tracking pixel in order to obtain data about the opening rate of your mailing. To do this, select one of the images using the option buttons. To delete a previous selection, click the *Do not select an image* button.

4.2.3 Links in the HTML version

All used links in the mailing are listed on the *Links in the HTML version* tab. You can track all or individual links to evaluate how often a recipient clicks a link.

Name in the report

The *Name in the report* field contains the name of the link as it is shown in the report. Depending on the configuration setting, the plug-in generates a simple name (HTML Link 1, HTML Link 2, and so on) for every link. It is therefore recommended to overwrite the automatically generated name with a meaningful name to quickly find the (tracked) link in the report.

Note If you prefer to have empty input fields, review the plug-in's configuration settings. Automatic generation of names for links can be disabled there.

Link type

Under 'Link type', select whether all or individual links are to be tracked.

If the same type of link needs to be selected for all links, click the drop-down list under *All* and select the desired type of link tracking. This type of link tracking will now be used for all existing links.

The following types of links are available:

Link type	Description
Personalised tracking (unique-count)	All clicks from a person are counted regardless of whether the person has previously already clicked this link, as well as the unique clicks from a person, that is, a maximum of one click per person (first reaction) is counted.
Anonymous tracking (count)	Every click is counted, regardless of whether a person has previously already clicked this link. Note No personal data is stored when you use anonymous link tracking.
Unsubscribe link	All clicks are counted to determine which people have unsubscribed from the newsletter.
Standard link (simple)	A standard link is not tracked, that is, the system does not count how often this link has been clicked. Note Mail-to links cannot be tracked. Select the standard link for this purpose.

If you would like to select an individual link tracking type for each individual link, go to the *Link type* column and select one of the option buttons after every link address.

You can click the link address to determine where the link is localised in the mailing. You automatically switch to the *Visual editor* tab, which provides a preview of the edited mailing.

4.2.4 Visual editor

The *Visual editor* provides an initial preview of the uploaded mailing. On this tab, you can also directly carry out editing steps from the *Images in the HTML version* and *Links in the HTML version* tabs.

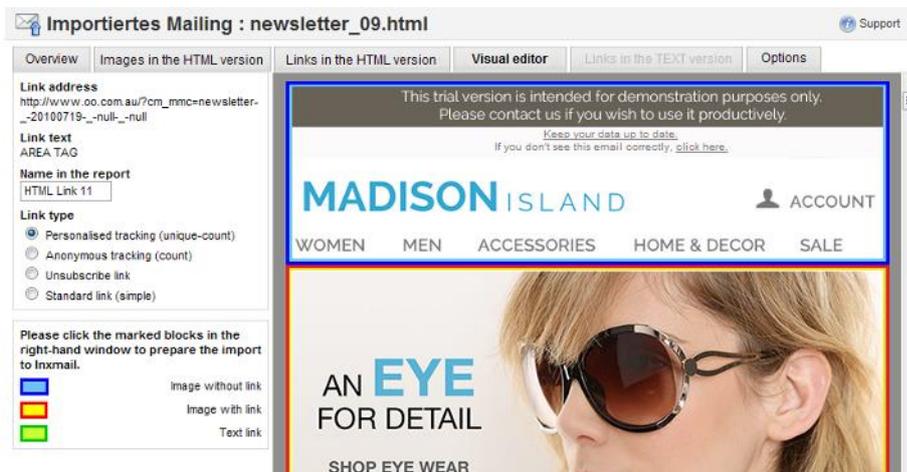


Figure 7: Mailing Upload plug-in: Visual editor

To do this, click the elements with a surrounding border.

Border	Description
Blue – light blue	This indicates an image without a link.
Red – yellow	This indicates an image with a link.
Green – light green	This indicates a text link.

You can use the form field in the left viewing area for editing image files and link addresses. All changes that you make can be directly viewed on the *Images in the HTML version* and *Links in the HTML version* tabs.

4.2.5 Links in the TEXT version

You can edit the links of the TEXT file on the *Links in the TEXT version* tab. Proceed in the same way as on the *Links in the HTML version* tab (*Links in the HTML version* page 10).

4.2.6 Options

On the *Options* tab, you are able to upload the mailing to an FTP server or use Web tracking.

Note The settings are only visible if they have been enabled in the basic settings within plug-in administration (*Configuring the plug-in* page 3).

FTP settings (optional)

You can upload the mailing to an FTP server under *FTP settings (optional)*.

Note The form will not be displayed if there are no images available in the mailing.

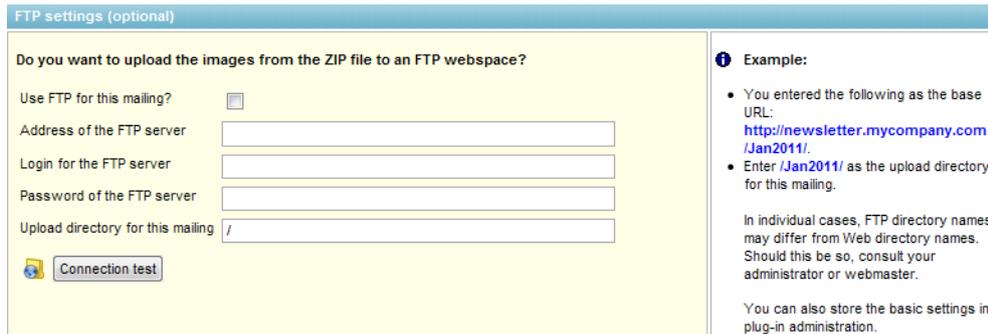


Figure 8: Mailing Upload plug-in: FTP settings

Configure the following settings:

Setting	Description
Use FTP for this mailing	Enable the check box if you would like to use an FTP server for the current mailing.
Address of the FTP server	Enter the FTP server address here.
Login for the FTP server	Enter the login name here.
Password of the FTP server	Enter the password here.
Upload directory for this mailing	Enter the upload directory here.

Click *Connection test* if you would like to test the connection to the specified FTP server.

Web tracking (optional)

You can add Web tracking parameters to existing links under *Web tracking (optional)*.

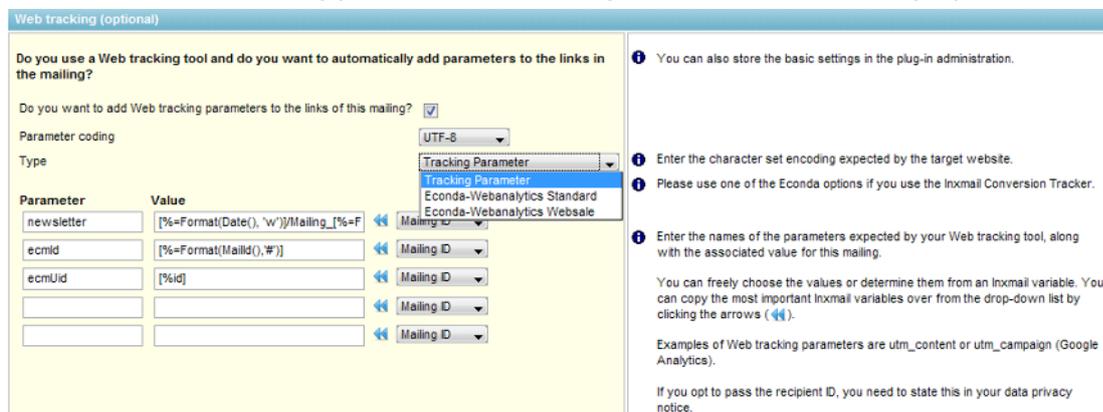


Figure 9: Mailing Upload plug-in: Adding Web tracking parameters

Configure the settings:

Setting	Description			
Do you want to add Web tracking parameters to the links of this mailing?	<p>Enable the check box if you would like to add Web tracking parameter to the links.</p> <p>The tracking parameters are added during upload of the mailing.</p>			
Parameter coding	Select the character set encoding expected by the target Web page from the drop-down list.			
Type	<p>Select a tracking type from the drop-down list. The parameter input behaves dynamically according to your selection.</p> <p>Note Use one of the two Econda tracking types if you use the Inxmail Conversion Tracker.</p> <p>Tracking parameters</p> <p>Select this value for Web tracking tools.</p> <p>Enter the name of the parameter expected by your Web tracking tool under <i>Parameter</i>.</p> <p>Enter the corresponding value for the parameter under <i>Value</i>.</p> <p>You can freely choose the values or determine them from an Inxmail variable.</p> <p>Note You can copy the most important Inxmail variables over from the drop-down list by clicking the arrows.</p> <table border="1"> <tbody> <tr> <td>Econda Web analytics Standard Use this value for Magento and Oxid online shops.</td> <td rowspan="2"> Über diese Felder wird der Wert für den variablen Trackingparameter newsletter festgelegt. Dieser Wert besteht aus drei Bestandteilen. Sie können die voreingestellten Werte übernehmen oder manuell überschreiben. <ul style="list-style-type: none"> • Campaign level 1 (week) • Campaign 2 (mailing) • Campaign 3 (link) </td> </tr> <tr> <td>Econda Web analytics Websale Use this value for Websale online shops.</td> </tr> </tbody> </table>	Econda Web analytics Standard Use this value for Magento and Oxid online shops.	Über diese Felder wird der Wert für den variablen Trackingparameter newsletter festgelegt. Dieser Wert besteht aus drei Bestandteilen. Sie können die voreingestellten Werte übernehmen oder manuell überschreiben. <ul style="list-style-type: none"> • Campaign level 1 (week) • Campaign 2 (mailing) • Campaign 3 (link) 	Econda Web analytics Websale Use this value for Websale online shops.
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Additional information

Detailed information on the use and setup of the econda tracking parameters can be found in the following document:

» Inxmail Professional Conversion Tracker User Manual

4.3 Step 3: Generate mailing

If you have configured all your settings, click *Finish*. You have successfully uploaded the mailing. It will be stored in your mailing list under the specified mailing name.

You can repeat the procedure for further mailings. To do this, click *Upload another mailing*.

Open the uploaded mailing in the  *Mailings* agent for further editing.

Important Carefully check the content of the mailing before you send it!



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