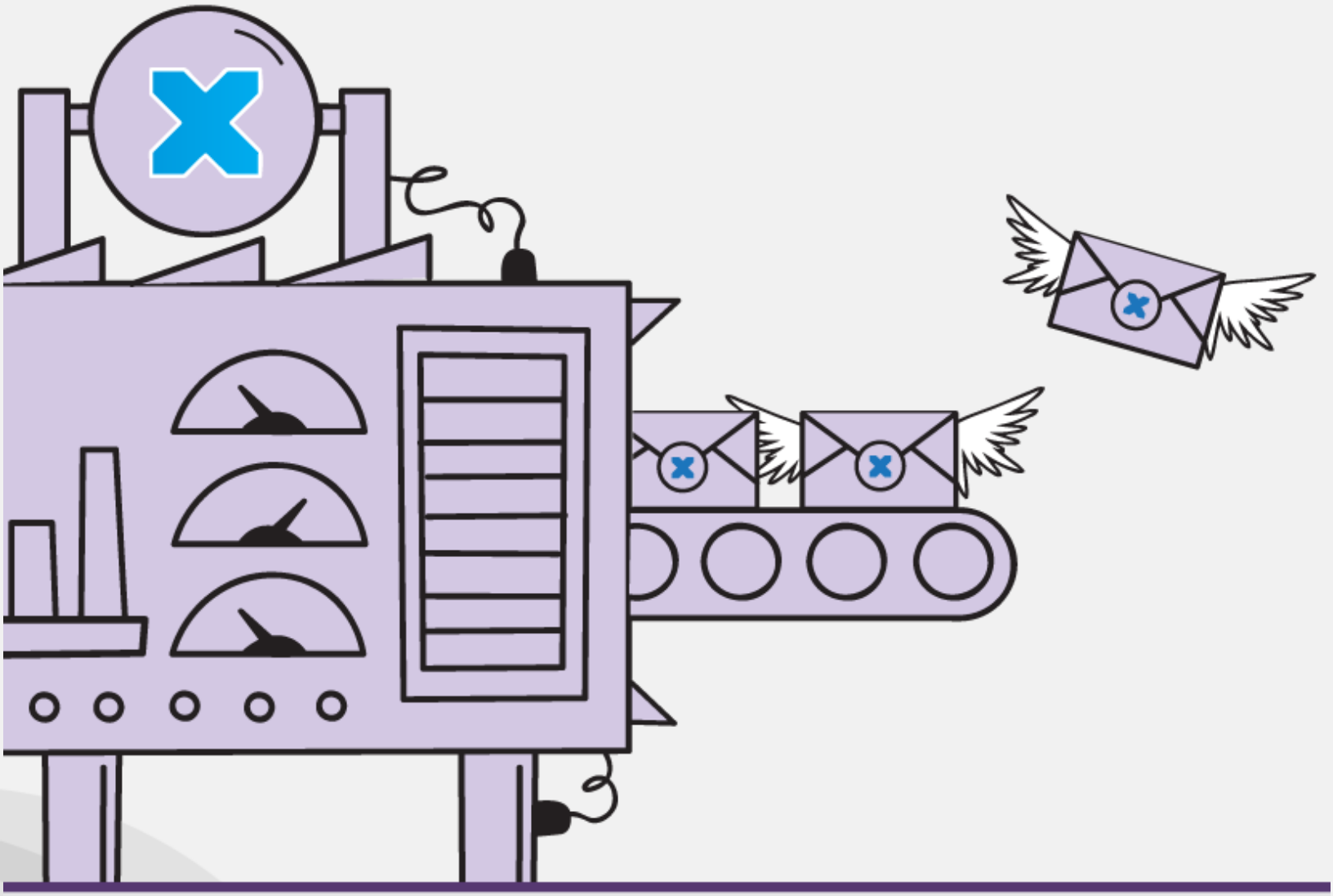
Getting started with Maxmail



maxmail

www.maxmailhq.com

GETTING STARTED WITH MAXMAIL

If you're new to email marketing you may need to read some of our Basic Guides series before diving into this one – which assumes that you're familiar with the lingo and the basic functionality of an email marketing platform.

This guide covers

1. Setting up the customizable areas of Maxmail
2. Setting up subscriber lists
    a. Connecting to other systems
    b. Basic Auto-responders set-up
3. Creating templates
4. Buying SMS credits
5. Getting help

CUSTOMIZABLE AREAS OF MAXMAIL

Before you start using Maxmail there are a few set up activities that you might want to spend some time on upfront . This will mean that you will be prepared when you need to start working on your first campaign.

Password Make sure you change from the default as soon as you have upgraded. You don't want Maxmail to end up in the wrong hands! The first time you log in you'll be asked to change your password anyway.

Local time In the settings tab you will need to select your time zone. This is important if you intend to schedule campaigns to go out at certain times or use auto-responders. It's also important for accurate campaign statistics, where the time that emails are opened is recorded as well as when users click through to a website.

From address This address is hardcoded into Maxmail. Before you can send an email, it must be a unique domain – e.g. user@businessname.com rather than a freemail address like john@gmail.com. If you signed up to a trial on a freemail address you will need to contact us to change it.

Social Media Before you can post your campaigns on Facebook, Twitter or Linked In you need to set these accounts up in Maxmail. When you do this, you'll also be able to preview your campaigns in the various social media before you decide whether to post it or not.

Assets All of your images, logos and attachments can be uploaded to the assets section of Maxmail so that they're there ready to use when you need them. You can create folders to store attachments in whatever way works for you.

Logos	**Landing Pages**
Images	**RSS Feeds (see below)**
HTML templates	**Dynamic Content Blocks (see below)**
Attachments (PDF)	

RSS Feeds
RSS is used to publish frequently updated works—such as blog entries, news headlines, audio, and video. They benefit readers who want to subscribe to timely updates from favorite websites or to aggregate feeds from many sites into one place.

In Maxmail they can be set up by going to Assets/ RSS feeds and selecting the feed and a mailing list.

Landing Pages
Landing pages are web pages that your readers access by clicking on an embedded link in your email campaign – they are usually used when you don't have quick and easy access to creating new pages on your website.

URL's to existing landing pages can be stored within Maxmail and new Landing pages can be created using the HTML editor.

Dynamic content
Dynamic content is a way of creating and sending relevant, specific information to different segments within your mailing list. By creating a generic email and then inserting dymanic content to different segments you can personalize and make your content highly relevant.

Footer set up
Each email has a customizable header and footer. We recommend that you set the default and change it if required. The Footer should in most cases provide information about how to unsubscribe from the mailing list, this needs to be clear and in a decent sized font.

Connecting to other systems

From a user perspective, interaction with you is not (or shouldn't be) clearly defined as email and website, they are both part of the same journey and should be integrated into a single experience. This includes subscribe forms to your newsletter being posted on your website and providing specific landing pages that act as a bridge between your email campaign and your website.

With Maxmail you can connect to your website and any 3rd party systems

- Maxmail and your website/ Facebook
    - Subscribe and unsubscribe forms can be created within Maxmail and the code pasted onto your website. You will need to get your web designer to help you integrate it nicely into the page that you are positioning the forms.
    - Landing pages can be created by your website team and the URLs stored in Maxmail. Links to these landing pages can be included in your email campaigns.

- Maxmail and Dimension CRM
    - Dimension CRM is fully integrated with Maxmail, enhancing the Customer Relationship Management and subscriber management functionality in both systems. If you have both Maxmail and Dimension CRM accounts we will configure the two accounts to work seamlessly together. A phone call to support is all that it will take.

- Maxmail and another 3rd party application (API's)
    - Using APIs (see the API documentation here) you can connect to any SQL, Access or Oracle database, we also have some more obscure API's written for specific applications. Using our documentation, either your web developer can implement these for you, or our technical team can help you out. If you have any requirements to connect to any other system that requires custom development we're always happy to provide you with a quote.

SETTING UP SUBSCRIBER LISTS

Your subscriber lists can be imported into Maxmail using one of the following methods.

- CSV file (Excel spreadsheet saved as a true CSV file) or Access Database
- Outlook or email account (make sure you clean the list up properly before or after importing all of your contacts from an email account – do you really need your bank manager on your marketing list?)
- API – dynamically from a 3rd party application
- Manually, one by one in Maxmail

Each piece of data is mapped into either standard fields – i.e. fields that we have created as a default inside Maxmail which can be turned on or off - or custom fields, i.e. fields that you set up as required to store any other piece of information that you will need to hold about your subscribers in order to segment your lists or customize messages to them. (You can create an unlimited number of custom fields)

Subscribe forms – to put on your website or Facebook

One of the benefits of using a bulk email marketing platform such as Maxmail is the ability to automatically capture leads from your website and place them in your mailing lists.

As part of the list creation process in Maxmail you will be given the choice to generate forms which you can post on your website and/or Facebook page. The HTML code is simply copied and pasted into your desired web page (you may need to get your website manager to become involved if you want the sign up form to be “designed” into your webpage.)

Note: the HTML code can be pasted onto multiple pages and anyone entering their details into the form will be automatically and dynamically added to the Maxmail mailing list. Make sure you have all the fields you're going to need when setting this up!

Unsubscribe forms/ manage my subscription page

Just like your subscribe forms, you may want to have a customized unsubscribe or manage my subscription page on your website. This can be created within Maxmail and the HTML code pasted onto your site by your website manager.

SETTING UP LANDING PAGES

Subscribe landing pages

When someone has filled in a form they will be directed to one of 2 landing pages

1. Success URL

Example: Congratulations, you have successfully signed up to receive Joe's Café weekly newsletter. To unsubscribe at any time visit us at www.joescafe.com.

2. Failure URL

Example: There was a problem with your request. Please contact us at info@joescafe.com

Both of these pages are provided by default through Maxmail, however you may already have these landing pages on your website in which case you can set them up as Landing Pages in the Assets section.

TIP: See section below for how to set up auto-responders to greet your subscribers and keep them engaged

Unsubscribe landing page

Un-subscribers will be directed to this page to confirm that the action has been completed. You can use the default within Maxmail or create your own and enter the URL into Maxmail.

Note: This page is your last opportunity to engage with an unsubscribing customer. Consider capturing the reason for unsubscribe and if you have social media accounts, maybe suggest that they add you as a friend so that they can keep up to speed with what you're doing. This is better than them completely disengaging!

TIP: See section below for how to set up auto responders to confirm that subscriptions has been cancelled or to send an exit survey so that you can gather feedback/reasons for the unsubscribe.

Setting up basic auto-responders

Setting up auto-responders isn't hard work however there are so many possibilities you may have to sit down and think about what is appropriate for your business. See the Basic Guide to Automation for a full explanation of how to set up auto-responders. Here are a couple that you may want to quickly set up as part of the initial Maxmail configuration.

Subscribers

Set up an auto-responder email or SMS for each time someone subscribes to a list.

- Welcome and thanks for subscribing
- Welcome gift – e.g. voucher or discount for B2B
- Welcome gift – white paper or tips for B2C

Un-subscribes

Set up an auto-responder email or SMS for when someone un-subscribes from a list.

- Sorry to see you go message
- Link to exit survey – so that you can gather reasons for the unsubscribe
- Exit giveaway – white paper or tips
- Visit us on our social media page to keep in touch

For more information about setting up auto-responders see the Basic Guide to Auto-responders.

CREATING TEMPLATES

Now that you have your lists set up it's time to think about the type of campaign you will be sending out and whether you need to create a customized template beforehand. Even plain text templates can be set up and saved so that they are ready to use.

Tip: Read the Guide to Email Copywriting and Design to get some ideas about how to create emails with the best possible chance of success.

For email you have several options

1. Use one of our stock templates and make the required changes
2. Create your own template using the drag and drop editor and your own images/ logos etc that you have stored in the Assets section
3. Create an HTML template in the HTML editor (or get your designer to do it)
4. Ask us to create a customized template for you that is optimized for performance.

SMS TEMPLATES

This is really useful if you are planning to implement SMS auto-responders. The wizard will walk you through the set up – make sure you personalize your message using the smart tags!

Buying SMS credits

You will need to purchase credits before you can send SMS campaigns. You can do this by hitting the Buy Add Ons button inside Maxmail after choosing the SMS bundle that suits and entering your credit card details.

Tip: Make sure you have enough credits to cover any auto-responders as well as actual campaigns that you are sending out. Use Maxmail's Credit alert to inform you of when your balance goes below a chosen number of credits

Getting help

Congratulations. You're just about ready to start using Maxmail to grow your business and communicate with your customers and prospects.

We want you to be as successful in the email/ SMS marketing game as possible, so we're always here to help. If you have a pressing question or just want to learn more about how to make your campaigns even more successful – give us a call. We'd love to hear from you.

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