








Tutorial Objectives:

Gold-Vision Connect

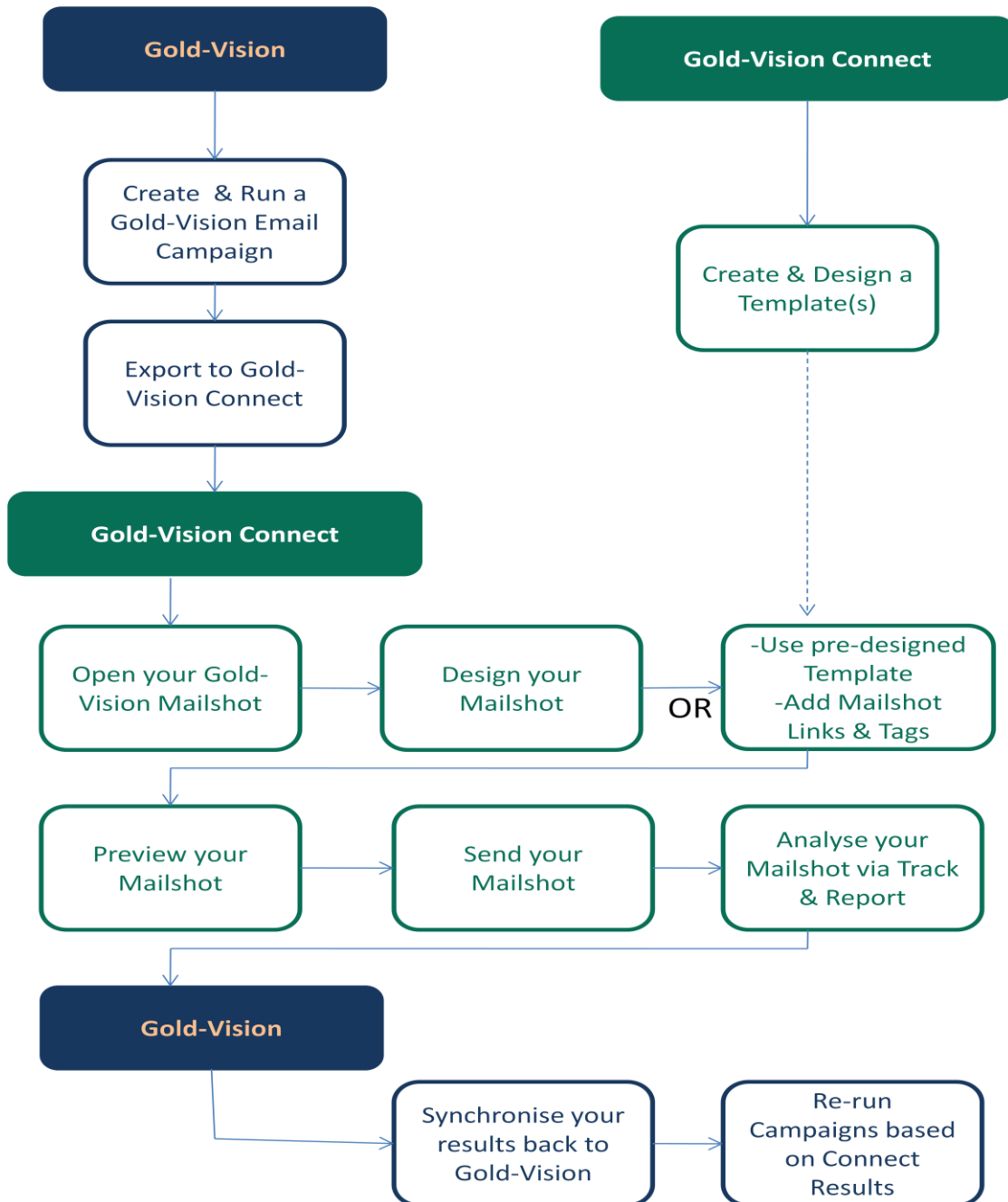
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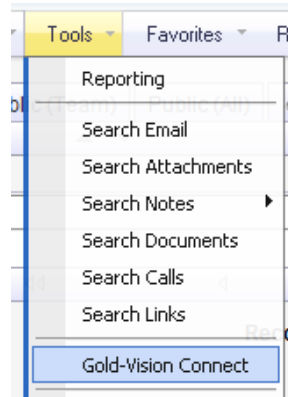
What is Gold-Vision Connect?

Gold-Vision Connect is an online contact management service that integrates with Gold-Vision CRM. Currently, Gold-Vision Connect allows you to send targeted direct marketing emails to your Gold-Vision Contacts and track responses.

The Gold-Vision Connect Process



Accessing Gold-Vision Connect:
Tools → Gold-Vision Connect



You can also login to Gold-Vision Connect via:
<http://portal.gv-c.com> Enter username and password

Please Login ✕

Username

Password

➤ **Gold-Vision Connect Home Page**

The Gold-Vision Connect home page shows:

- **News items**
- **Recent Events** – mailshots accessed, sent, uploaded, images uploaded or deleted etc.
- **Recent Mail shots** – most recent mail shots which have been uploaded

Click on the Recent Event or Mailshot to open the item.

Home Contacts Mail Shots Media Settings Help

Gold-Vision Connect 3

News

20 Jan 2011 - Connect Help Updated
We have updated our [help site](#). Please visit the [help site](#) if you would like to learn more about Gold-Vision Connect 3's features.

Recent Events

| | | | |
|-------------------|---------------------|-------------|------------|
| Mailshot Accessed | February Newsletter | Nikki Bugla | 13 Minutes |
| Mailshot Accessed | January News | Nikki Bugla | 40 Minutes |

Recent Mail Shots

February Newsletter Sent

Mayfair Connect Campaign Sent

January News Sent

Tags test Sent

Tags test

➤ **Getting Started**

Navigation

To navigate through the main system areas, please use the main menu at the top of the screen. To open a menu section, click on one of the title words from the menu. A sub menu will appear with related options. Click on one of the sub menu option to navigate to that section.



Contacts

This shows a list of all contacts uploaded to Gold-Vision Connect, all unsubscribed and Double Opt-In contacts.

Mailshots

Mailshots are Gold-Vision Campaigns that have been uploaded to Gold-Vision Connect to be sent as trackable emails. Emails can be fully designed using the WYSIWYG editor including images, attachments and click-thru links. Responses, click-thrus, bounce-backs, unsubscribes can all be tracked and reported on

Media

The Media Library is a repository for images and documents. It allows you to upload and store media for use later in mailshots for example. A range of image and document types can be uploaded to the library and are shared between you and your colleagues with similar access to Gold-Vision connect.

Settings

Under settings you can update your contact details, change your password, change program settings and view available credit.

Reporting

Top level reporting across all your Connect data.

Help

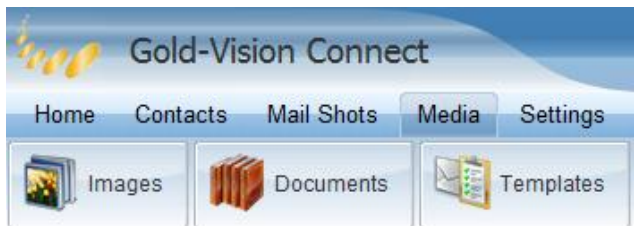
Access to Online help and Support

Designing your Template

➤ What are Templates

Templates allow you to create and edit the body of an email independently of a Mailshot. The main reasons for using a Mailshot template are that you can re-use the design between Mailshots and also work on a design before having uploaded a Gold-Vision Campaign to Gold-Vision Connect. Templates can be applied to a Mailshot under the design tab

➤ Media Library



The Media Library is a repository for images and documents. It allows you to upload and store media for use later in Mailshots or forms for example. A range of image and document types can be uploaded to the library and are shared between you and your colleagues with similar access to Gold-Vision connect.

When an image or document is uploaded to the Media Library it is stored live on the Gold-Vision Connect public web server under a unique link. You can add images to Mailshots and also create links to your documents or alternatively attach them to Mailshots.

➤ Image Library

The Image Library is a repository where you can upload images to Gold-Vision Connect for later use. Images of type **bmp**, **jpg**, **gif** and **png** can be uploaded. There is an enforced file size restriction on **250kb** per image. Uploaded images are shared between you and any colleagues with a Gold-Vision Connect login.

JPG – High compression which means they are very good for larger images like photos because they take up less byte space. They are not very good for smaller images with strong colour contrast (such as textual content) as the compression causes an undesirable, blur “fringing” effect.

GIF – Maintains colours so very good for textual images. Can have “transparent” regions. Limited to 256 colours, so poor for photos or images with high blended colours. Good for Company logos.

PNG – Similar to GIF but with more colours. Down side is that the file size tends to be larger.

BMP – Similar to PNG but tend to be even larger still. Not recommended.

NOTE: background images are not supported by most email readers. Background colours are supported; however, heavy use of high contrast colours can be seen as a “spam” type email.

Uploaded images can be added to mailshots or templates whilst using the HTML editor tool.

➤ The Image Library

The Image Library is a location where you can upload and organise images for later-use in mailshot or other designs. To open the Image Library:

1. Click **Media** from the main menu
2. Click **Images** from the sub menu

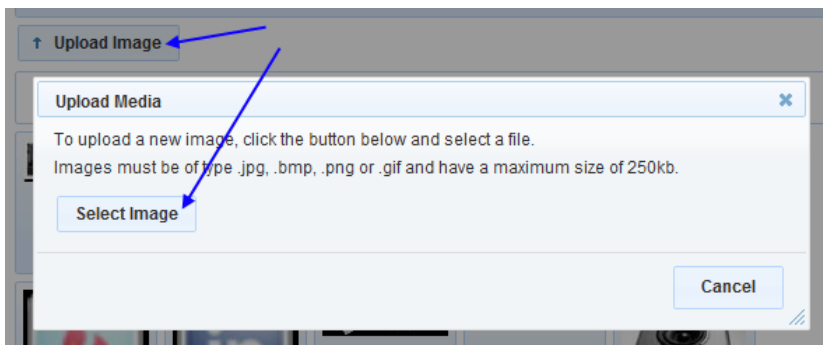


Uploading Images

To upload new images follow the instructions below.

1. Click the **Upload Image** button that is displayed towards the top of the screen
2. A dialog will appear prompting you to select a file
3. Click the **Select Image** button and select an image from your computer
4. The image will automatically upload

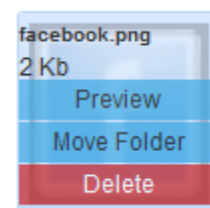
Please Note: There is a maximum image size restriction displayed on the upload dialog. You cannot upload images larger than this. We recommend that you resize your image to the approximate size you require before uploading to Connect.



Searching for Images

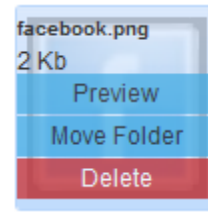
To search for an image use the standard search control at the top of the page. You can search by file name, size or date of upload.

Once you have found the image you are looking for, click hover over the thumbnail and click 'Preview' to preview it.



Deleting Images

To delete an image, click hover over the thumbnail and click **Delete**. You will be asked to confirm - click **Delete** to confirm.



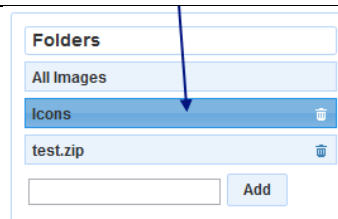
Organising Images in Folders

Images can be organised into folders. Media (images and documents) can be moved into folders to help with organisation. The list of media folders is visible on both the document and image lists.

The default folder option shows all images/documents from all folders and is useful for overall searching.

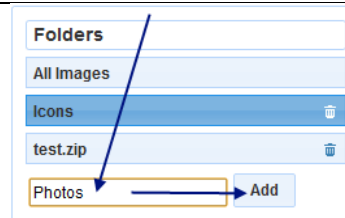
Opening a Folder

To open the contents of a media folder, click on its name from the list on the left of the screen. The list of media items to the right will refresh and the contents of the folder you clicked on will be shown.



Adding New Folders

To add new folders simply enter the name you wish to use in the box at the bottom of the folder list and click the 'Add' button. The image below illustrates this.



Deleting Folders

To delete a folder, click the delete/trash icon to the right of the folder name. You will be prompted to confirm - click **Delete** to confirm. The image below shows how to delete a folder.

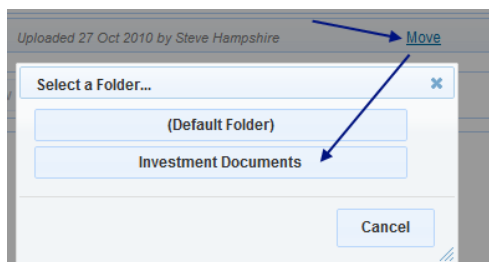


Please Note: If you delete a folder, all the sub-media within that folder will also be deleted.

Moving Items

To move items between folders you must click the **Move** link that appears against the media item and then select a folder to move the item to. In the case of images the **Move** link appears when you hover over the preview whereas for documents the **Move** link appears in the list.

The image below shows how to move a document.



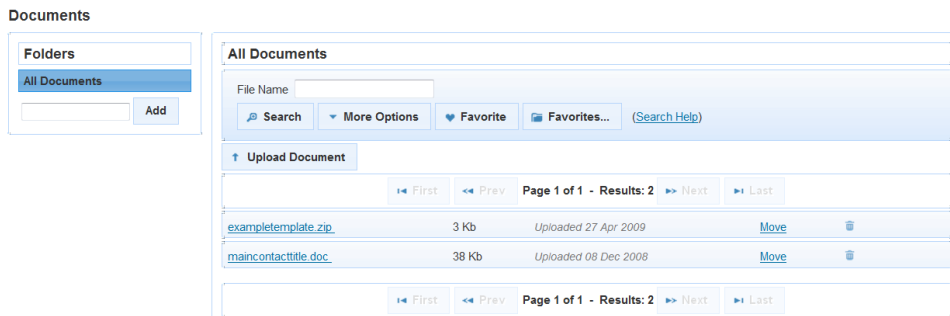
➤ Document Library

The Document Library is a repository where you can upload documents to Gold-Vision Connect for later use. Documents of type **doc(x)**, **xls(x)**, **zip**, **ppt**, **pdf** and **txt** can be uploaded. Uploaded documents are shared between you and any colleagues with a Gold-Vision Connect login.

Uploaded documents can be added to Mailshots as attachments or links whilst using the HTML editor tool.

To open the Document Library:

1. Click **Media** from the main menu
2. Click **Documents** from the sub menu

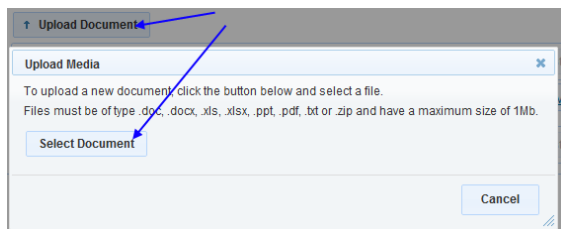


Uploading Documents

To upload new documents follow the instructions below.

1. Click the **Upload Document** button that is displayed towards the top of the screen
2. A dialog will appear prompting you to select a file
3. Click the **Select Document** button and select a document from your computer
4. The document will automatically upload

Please Note: There is a maximum document size and also type (doc, pdf etc) restriction displayed on the upload dialog. You cannot upload images larger than this restriction or of other types.



Searching for Documents

To search for a document use the standard search control at the top of the page. You can search by file name, size or date of upload. Once you have found the document you are looking for, click on the name in the list to open/download it.

Deleting Documents

To delete a document, click the 'delete' or 'trash' icon to the right of the list item as shown in the image below.



You will be asked to confirm the delete - click **Delete** to confirm. Organising Documents in Folders

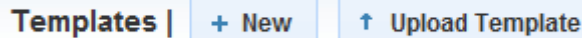
Documents can be organised into folders. To learn more about media folders, see Image Library

Templates

➤ Creating a Template

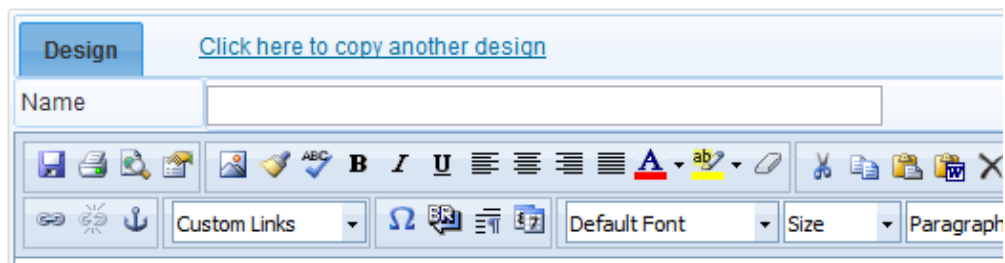
Creating a Template

Templates can be created in several ways – using the design tool, copying another template, copying a mailshot or they can be created using an html package and uploaded into Gold-Vision Connect.



1. Click **Mailshots > Templates** from the main menu
2. Click the **New** button
3. You will be navigated to an empty editor page
4. Edit your template design and click the 'Save' icon to save your design

← ↻ New Template



5. Alternatively click the link to copy another design. Select from the options and search for a design to apply.

Select a template to apply

User Templates

Copy a Mailshot

Stock Templates

➤ Uploading a Template

Mailshot templates can be uploaded in the form of a zip file containing html and images. This will allow you to quickly apply templates that you or an external agency has designed using an html package such as DreamWeaver.

One-Click Template Upload You can quickly upload an html page and multiple images in one step. Simply zip the files together into a single file and upload it using the template upload page.

1. Click **Mailshots > Templates** from the mail menu
2. You will be navigated to a list of templates
3. Click the **Upload Template** button.
4. A dialog will open prompting you to select your zip file
5. Select your zip file from your computer and the upload will process automatically

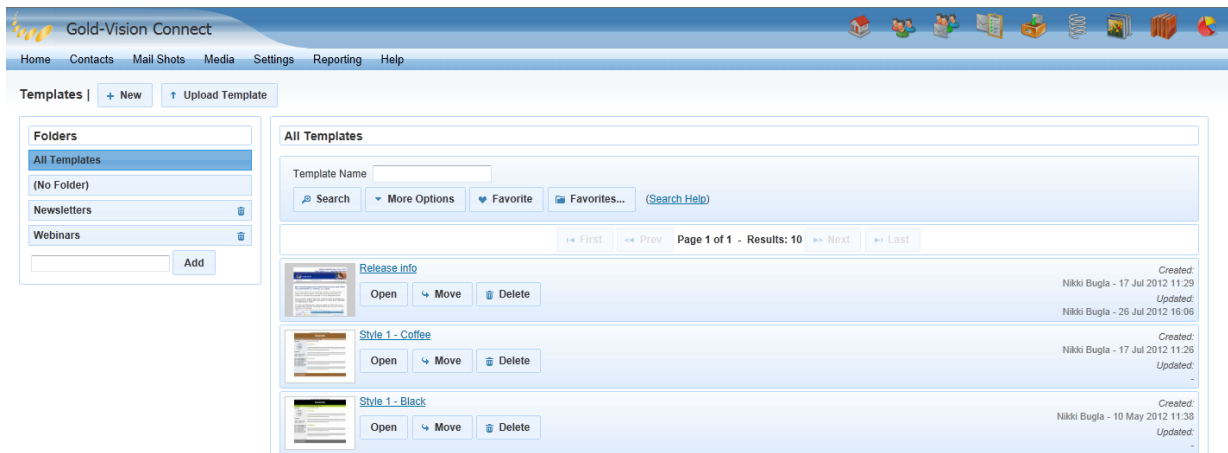
The html page will be turned into a mailshot template and any images automatically will be added to the media library

Please note the following restrictions

- **Include all style in the HTML file**
- **Any images should be relatively referenced or hosted online**
- **Do not use external CSS files**
- **Try to avoid background images**

➤ Viewing Templates

Templates can be viewed from Mailshots > Templates



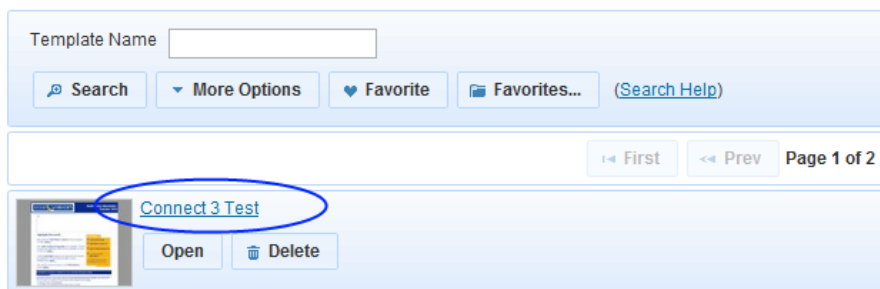
This will show a list of all templates. Folders can be created to enable you to organise your templates in a similar ways to images and documents.

➤ Editing A Template

Editing a Template

1. Click **Mailshots > Templates** from the mail menu
2. You will be navigated to a list of templates
3. Click on the name of the template in the list to open it for editing.
4. You will be navigated to the template designer
5. Click the **Save** button to save your changes

The template designer uses the same editor as the mailshot designer. Learn how to insert images or personalised tags. To learn more about the editor in general, see [Editing Your Mailshot or Template](#).



➤ **Editing Your Mailshot or Template using the HTML Editor**

The HTML editor included in Gold-Vision Connect offers WYSIWYG design of HTML content. It is comprehensive in its functionality whilst relatively simple to use.

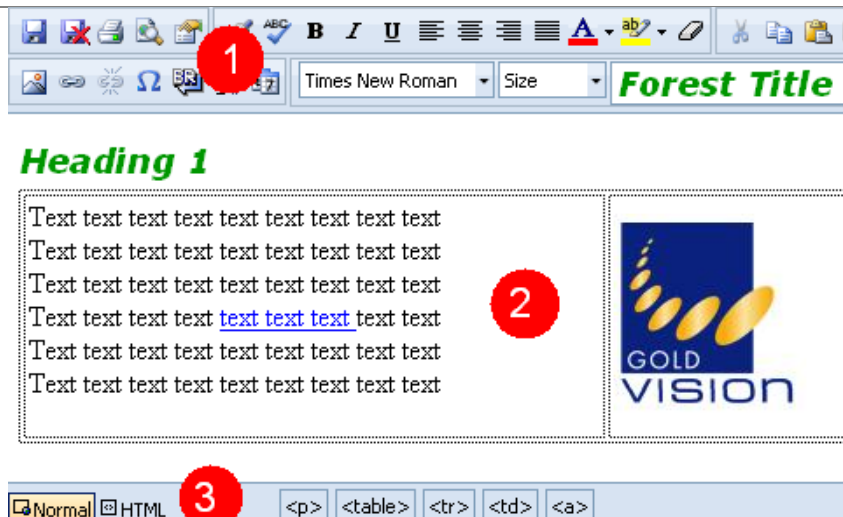
Text, images and visual content can be inserted, drag-and-dropped, copy-and-pasted, formatted and styled all using the in-built toolbar controls.

Most common Windows keyboard shortcuts also work (ctrl+c, ctrl+v, ctrl+x, ctrl+z etc).

➤ **The Editor at a Glance**

The editor is split into three main areas.

1. The **toolbar** is situated at the top of the screen and contains most of the controls. This can be used to control the format and style of your document as well as insert images and links. For a list of toolbar controls, see below
2. In the centre of the screen is a large window containing the page content. This is where you can paste, type or insert the actual content of the document. Use the mouse or cursor keys to position the cursor and start typing. Alternatively highlight some text and use the toolbar controls to change the style or format.
3. At the bottom of the screen is a smaller toolbar where you can switch between **Design** and **HTML** views of the document and also navigate and edit the **Tag Tree**.



➤ **Entering Text**

Text can be entered directly into the editor. Simply position the cursor where you would like to enter some text and start typing.

Text can also be copied and pasted from other text sources such as Microsoft Word, Notepad or similar. When text is copied from a source like Word, the editor attempts to maintain all style (bold, colour etc) already applied to the text when you copied it.

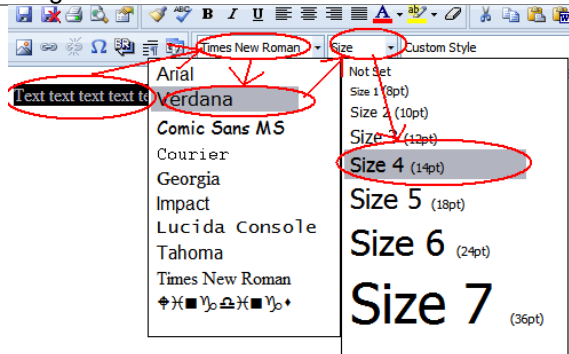
➤ **Formatting Text**

Choosing a Font

Fonts and font size can be modified by using the appropriate dropdowns from the toolbar.

Simply position the cursor into the text you would like to change or highlight some text and select a new font or size. In the example below, we change some text to **Verdana Size 4**.

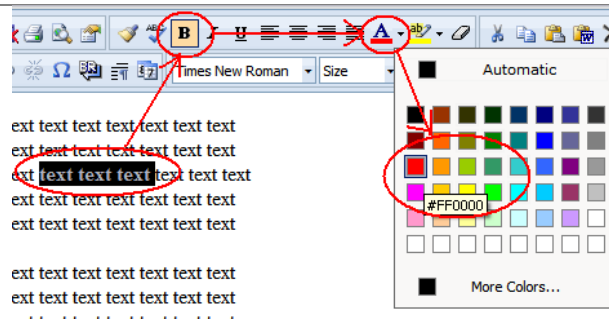
1. Position the **cursor** inside some text or **highlight** it
2. From the **Font** dropdown select **Verdana**
3. From the **Size** dropdown select **Size 4**



Font Style and Colour


Format and style changes can be made using the toolbar controls at the top of the screen. The typical way to do this is to move the cursor to the text location or highlight some text and then use one of the toolbar controls to modify the style. In the example below, we look at making some text **bold** and red.

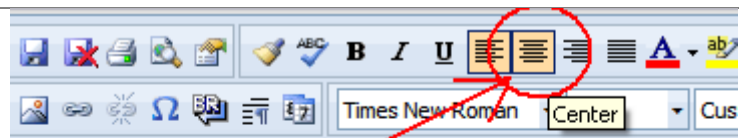
1. Move the **cursor** to the location you would like to change the format for or **highlight** some text
2. Click the **Bold** toolbar button (**B**) to make the text **bold**
3. Next click the arrow next to the **Font Color** control (**A**) and select Red



Text Justification

Text can be justified **left**, **right**, **centre** or **justified**. This is performed by selecting a paragraph of text and choosing one of the justification options. In the example below we look at making a paragraph of text aligned to the centre


1. **Click** or **move** the **cursor** into roughly the middle on a paragraph or line of text
2. From the **toolbar** choose the **centre** justification option ()
3. The text will align to the **centre** of its containing element

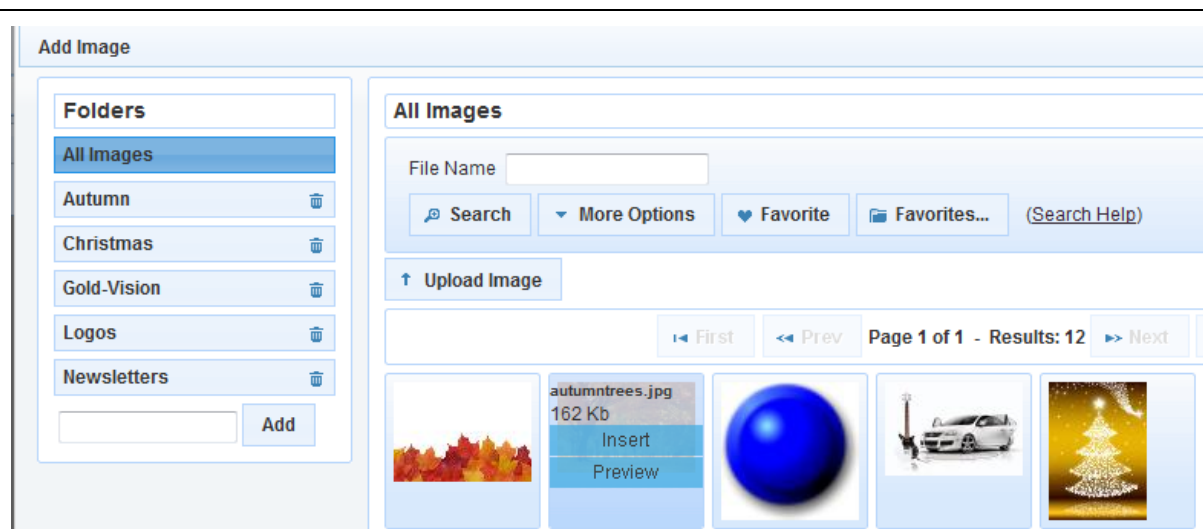


This is a paragraph of text that we would like to be displayed in the center of the screen.

➤ Inserting Images

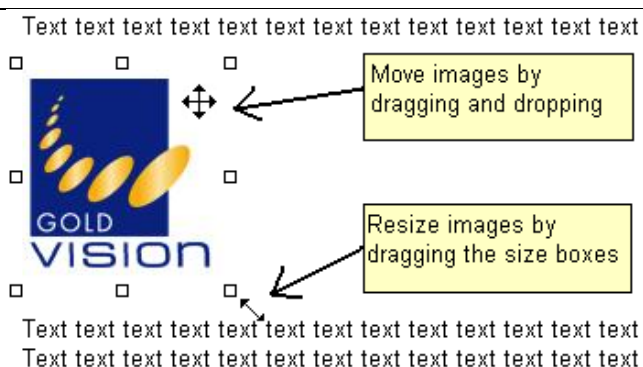
Images can be uploaded to Gold-Vision Connect via the Image Library and inserted using the HTML editor. To insert an image, please follow the instructions below. See Image Library for more information about image types.

1. Click the **Insert Image** button () from the toolbar.
2. An **Add Image** window will open
3. **Select** an Image from the list, or select a folder, either Insert or Preview the image. To upload a new image, click the **Upload New** button.
4. The image will be inserted into the editor window

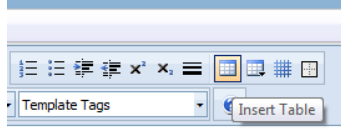

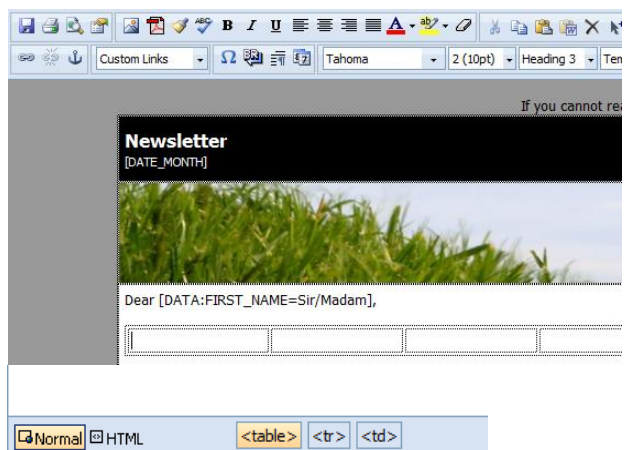


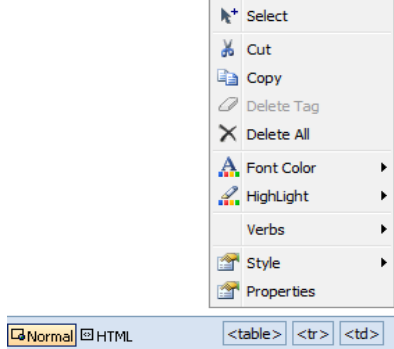


Moving and Resizing Images

Once the image has been inserted it can be moved by using drag-and-drop or resized by



➤ Inserting Tables

| | |
|---|--|
| <p>Select Insert Table from the Editor toolbar</p> |  |
| <p>Using the Wizard select the number of rows and columns required</p> |  |
| <p>Once the table has been inserted the cells, rows or table can be formatted</p> <p>Click on the table to activate the table tag tree at the bottom of the screen.</p> <p>Select <table> to select the whole table</p> |  |
| <p>Select <tr> to select the whole row</p> |  |
| <p>Select <td> to select the cell</p> |  |
| <p>To change the Font Colour or Highlight of the table/row or cell colour chose from the selection or chose more colours and select from the colour palette.</p> <p>Select Style to amend the font, colour, highlight and alignment.</p> <p>Select Properties to change row/column size, background colour, borders as well as format the text.</p> |  |

Adding/Deleting Rows or Columns

Click on the table, select **<table>** at the bottom of the screen and select **properties**.

To add rows or columns click the - +

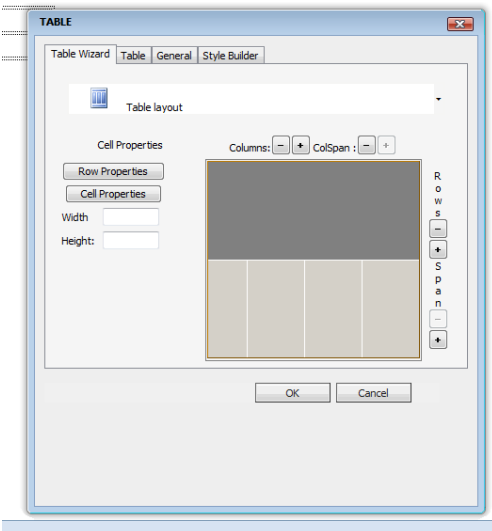
Merging Cells

To merge/unmerge cells to the right click in the cell then select ColSpan + or -

To merge/unmerge cells down click in the cell then select RowSpan + or -

You will see the effect of the changes on the table as you make the changes

You can also select from Table Layout dropdown menu



Editing the Table

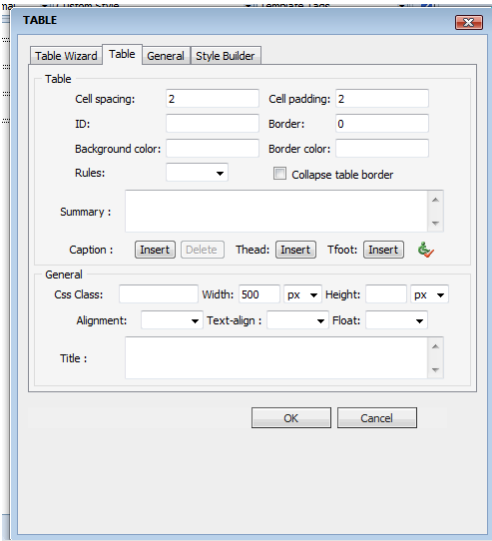
Changing the size of the table

From the Table Wizard select **Table**

Amend the Width, Height, Alignment of the table

Colour


Click on Background/Border colour to select your background or border colour

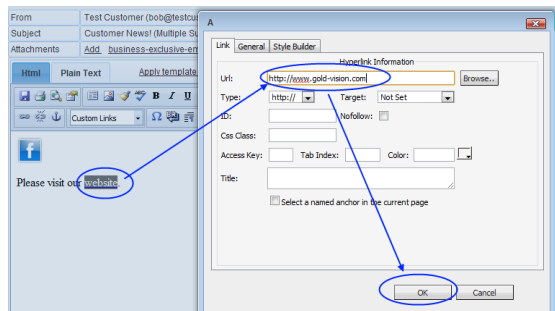


➤ Adding Links


One of the most power features of Gold-Vision Connects Mailshots is the ability to track which recipients have clicked on which links within your mailshot. In order for this to be possible, special action-links must be added to the mailshot at design time. Please note that you should have the mailshot open for editing and be familiar with the editor.

Adding an Action-Link

1. Click-and-select to **highlight** some text or an image you would like to link
2. Click the **Link** toolbar button ()
3. A new window will open prompting for a URL
4. Enter the URL you would like to link to
5. Click OK



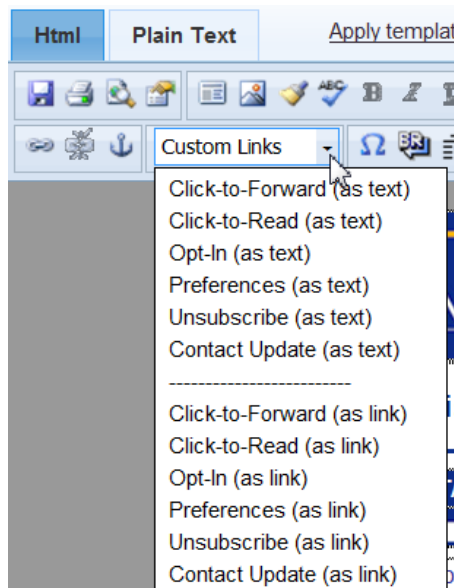
Removing a Link

To remove a link, click the cursor into the middle of the linked text or click once on the linked image and then click the un-link toolbar button ().

➤ Adding Custom Links

Gold-Vision Connect supports several types of custom link that allow you to provide specific functionality to the end recipients.

To select a custom link you must first open the mailshot in the Designer and then click the 'Custom Links' drop down box from the toolbar.



1. **Click-To-Forward** - allows end recipients to forward your email whilst you track the event.
2. **Click-To-Read** - end recipients can click on to read your email in a browser.
3. **Opt-In** - allows end recipients to 'Double-Opt-In' to your mail shots.
4. **Preferences** - Allow end recipients to manage their mail preferences as defined by you under your Mail Campaign Type Settings. (more detail to follow)
5. **Unsubscribe** - custom 'unsubscribe' link.

Contact Update - Allow your recipients to update their contact details as defined by you under your Contact Update Settings. See **Administrator Settings** for more information.

Adding Anchors

Page anchors allow visitors to jump to a specific place in the current webpage or to jump to a specific place on another web page.

You usually use page anchors if you want a graphic or text to link half way down another page. That way your visitor doesn't have read all through the page to get to the bit their interested in.

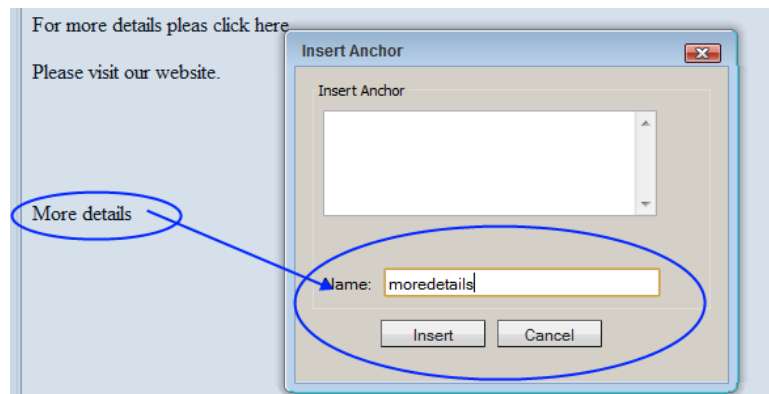
To create a link that points to another place on the same webpage, you need to create two anchors:

- a named anchor in the spot that you are going to jump **to**
- an anchor in the spot that you are going to jump **from**

Anchor links are links to locations elsewhere within the design. They are useful for jumping from summary information at the start of your mail to detailed information further down.

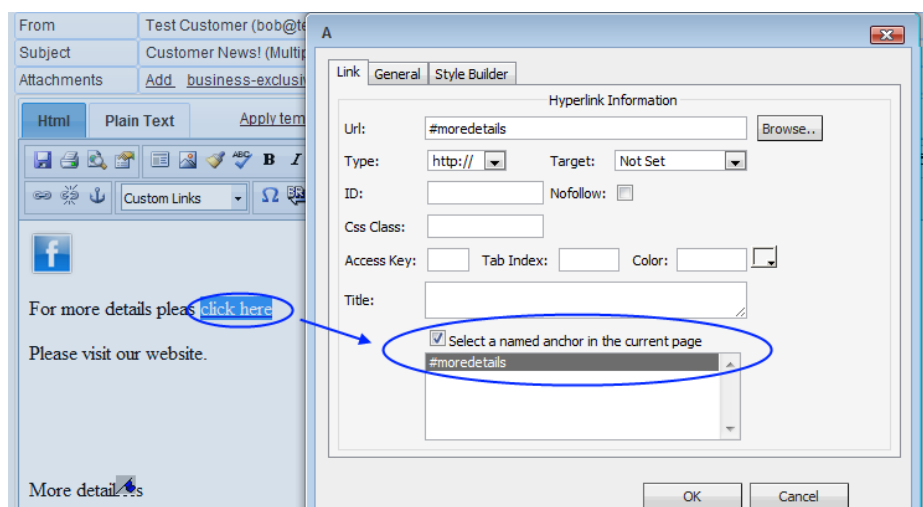
Step 1 - Creating an Anchor (Destination)

1. Open your mailshot for design
2. Highlight a word or text that you would like to make the designation anchor
3. Click the anchor icon from the tool bar (📌)
4. Enter a name (do not use spaces)
5. Click Insert



Step 2 - Linking to the Anchor

1. Highlight a word or text that you would like to link from
2. Click the link icon from the menu (🔗)
3. A link dialog will appear
4. Click the 'Select a named anchor in the current page' box
5. Select your anchor from the list
6. Click OK



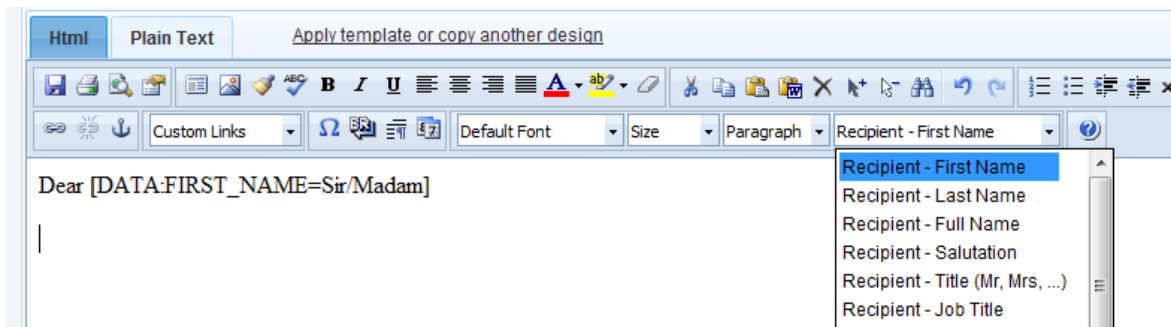
➤ **Template Tags**

Template tags allow you to personalise your mailshot body to include sender and recipient names and contact details. Please note that you should have the mailshot open for editing and be familiar with the editor.

Inserting a Template Tag

1. Click the cursor where you would like to insert the tag
2. Click the **Template Tags** drop control from the toolbar
3. Click on a **Tag Name**
4. The tag will be inserted at the cursor location

In the example below, the text "Dear" has been entered followed by a space. Next, the "Recipient - First Name" tag has been selected. This will be inserted directly after the space.



How Do Template Tags Work?

Template tags are stored as text in the email body and are replaced when the mailshot is previewed or sent with the corresponding data. For example the tag

[DATA:FIRST_NAME=Sir/Madam]

might be replaced with the name

Andrew

Hence the text "Dear [DATA:FIRST_NAME]" might become "Dear Andrew".


If there is no data in the first name field, this will be replaced with Sir/Madam

Sir/madam can be amended as required e.g Customer or Member


When you click the **Preview** tab under a mailshot, you will be navigated to the mailshot preview page. Any template tags will be replaced with data and any tags that did not contain data will be listed under a warning message.

➤ **Saving or Discarding Changes**

Saving Changes

It is important to save your changes before navigating away from the editor page. To do this click the **Save** button () from the toolbar.

Discarding Changes

If you are not happy with your changes and would like to discard them, simply click the **Discard Changes** button () and confirm.

Design Tips

Can I use my own designer for example DreamWeaver?

Yes, you can design emails using DreamWeaver or a similar tool and then upload them as a template email to Gold-Vision Connect.

1. Create a single HTML page in DreamWeaver
2. Ensure any images are stored locally to the HTML page and reference using an tag (not CSS)
3. Do not use any external CSS stylesheets, include the CSS in the <head> tag
4. ZIP the HTML document and all images into a single ZIP file
5. From the Mailshots -> Templates page select the "Upload a Template" open
6. Select your ZIP file and click "Upload"

Can I use Word or MS Office to design Emails?

Avoid pasting content directly from MS Word into the designer. Doing this causes huge volumes of extra data to be added. Instead, please try pasting the text into Notepad and then re-copy it and past it into the designer. By pasting it into Notepad and then re-copying it, you remove any Word font or formatting.

Text

It is important to include at least some textual content in paragraph form because makes the email more legitimate. Emails containing just images with no textual content at all often become blocked or filtered. Images containing text do not count.

Enter the content first before applying any style. Type / paste in all the content in "plain text" before attempting to change any fonts or styles. By approaching the design in this order you will reduce the number of times you need to apply font or style to a given section and this in turn will avoid the problems that occurred with this particular mail shot.

Avoiding Spam

If you carry out email marketing campaigns and keep getting emails blocked before they reach your customers, then the chances are you're using too many words that look like spam. How does this work? Well every occurrence that is suspicious attracts points, and a high overall score for your mail means it'll get blocked. Scores vary depending on the software used, or how it is configured for the client, but rest assured, you'll also look like a spammer for telling everyone **it's FREE!** or that they can **SIGN UP NOW!**, so consider your wording carefully.

Subject Line

Consider the audience and think about the 'what's in it for me?' principle. Don't promise anything that the body of the email doesn't deliver

When to send

If you are sending regular newsletters send them at the same time of day, recipients will then come to expect your newsletter

Further information:

Direct Marketing Association Email Marketing Council, Best Practice Guidelines June 2007

http://www.dma.org.uk/_attachments/Resources/230_S4.pdf

➤ What Are Mailshots

Mailshots are Gold-Vision Campaigns that have been uploaded to Gold-Vision Connect to be sent as trackable emails. Emails can be fully designed using the HTML editor or a software design package such as DreamWeaver, including images, attachments and click-thru links. Responses, click-thrus, bounce-backs, unsubscribes can all be tracked and reported on and synchronised back to Gold-Vision.

Please see the Gold-Vision Campaigns Tutorial for instructions on creating a Gold-Vision Campaign.

Select a Type from the dropdown and select Email as the Medium.

Uploading a Campaign to Gold-Vision Connect

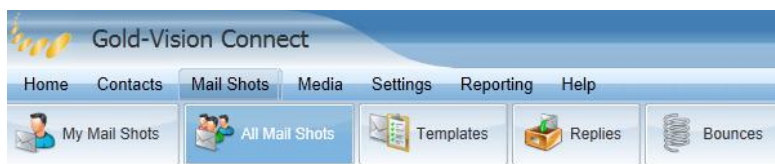
Once a Campaign has been created in Gold-Vision, it can be uploaded to Gold-Vision Connect as a new mailshot. To "Run" a Campaign in this way, select

Run > Export to Gold-Vision Connect from the Campaign menu in Gold-Vision.

Click **Yes**

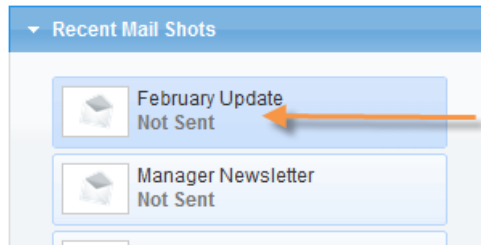
You will receive an email confirming the upload of the Campaign to Gold Vision Connect

Once completed, a Mailshot within same name will appear on your **Home Page – Recent Mailshots** (see image below) and under your **My Mailshots** list in Gold-Vision Connect

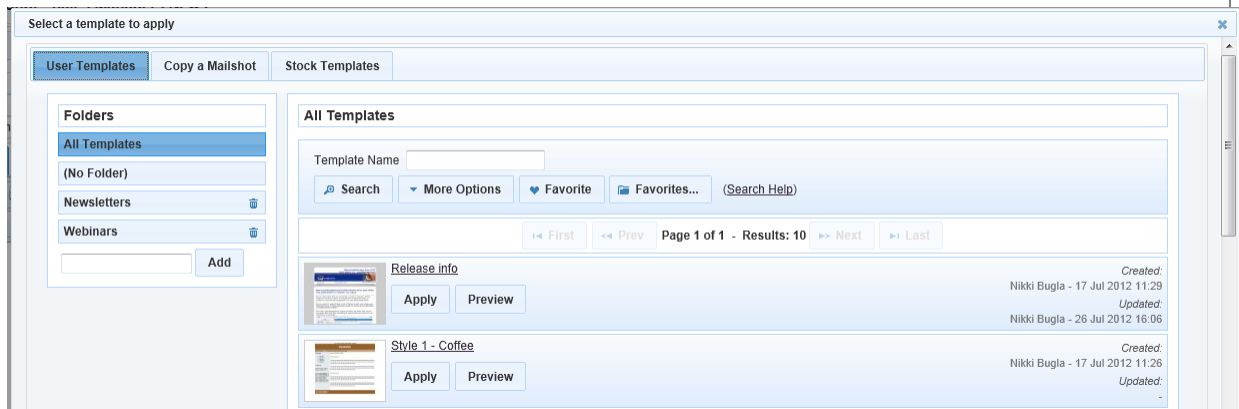
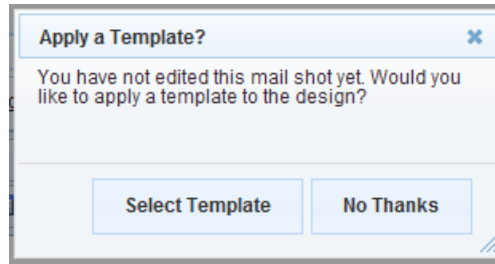


➤ Applying a template to a Mailshot

When you upload a Gold-Vision Campaign to Gold-Vision Connect, a new Mailshot will be created with the same name as the source Campaign. You will be able to see the new Mailshot under the My Mailshots list from Gold-Vision Connect or Recent Mailshots on the Homepage.



When you first select the mailshot, you will be asked if you would like to apply a template to the design. If so, click Select Template and chose from your list of user templates, mailshots or stock templates.



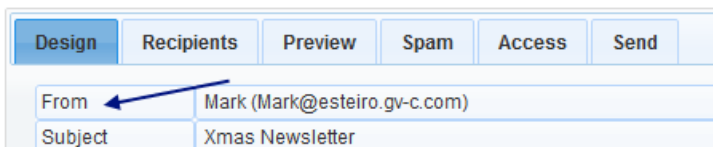
You can also copy a mailshot or use a stock template

Once a Template has been selected you will be asked if you want to overwrite the design with this Template. Click OK.

From Addresses

From the main design section you must specify one or more 'From' addresses. These are the addresses that your mail shot will be sent on behalf of and also what the end recipient will see.

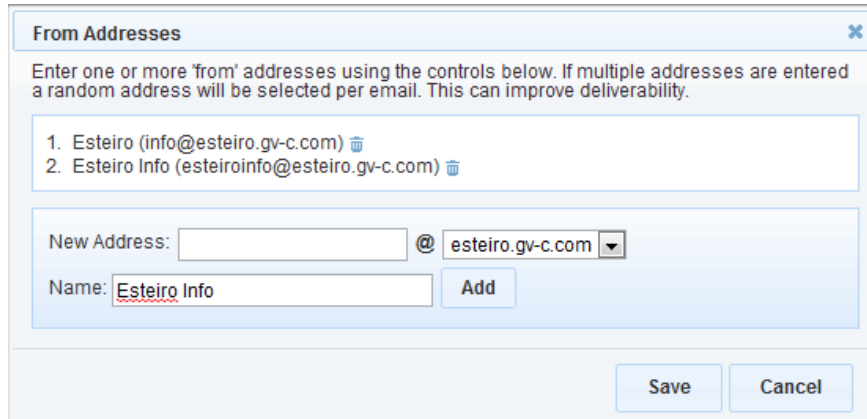
To edit the 'From' addresses click the 'From' label as shown in the image below.



A dialog box will load as shown in the image below. This will allow you to add and remove 'From' addresses from your mail shot.

Please Note: It is possible to add multiple 'From' addresses to a single mail shot. When doing this a

random 'From' address will be used per recipient when the mail shot is sent. Using this functionality can improve deliverability, especially if you mail to large numbers of Hotmail, Live, Yahoo, Gmail or similar addresses.

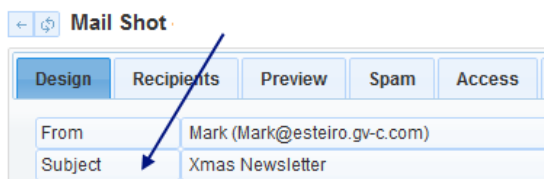


To add a new 'From' address enter the pre-@ and name you wish to use and then click the **Add** button. Click the small delete/trash icon to remove addresses and finally click **Save** when you are complete.

Subjects

From the main design section you must specify one or more **Subjects**. These are the subjects that will be displayed to the end recipient when your mail shot is sent.

To edit the **Subjects** click the **Subject** label as shown in the image below.

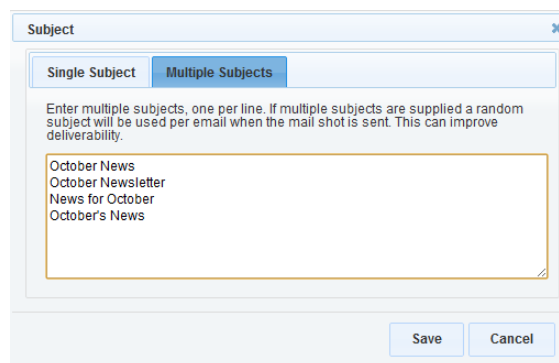


A dialog box will load as shown in the image below. This will allow you to edit the **Subject** for your mail shot.

Please Note: It is possible to add multiple **Subjects** to a single mail shot. When doing this a random **Subject** will be used per recipient when the mail shot is sent. Using this functionality can improve deliverability, especially if you mail to large numbers of Hotmail, Live, Yahoo, Gmail or similar addresses.

To edit the **Subjects** select between **Single** and **Multiple** and enter the subject lines as required.

Once the mailshot has been sent you can see how many emails were sent and opened by each subject line. See mailshot reporting for more details.



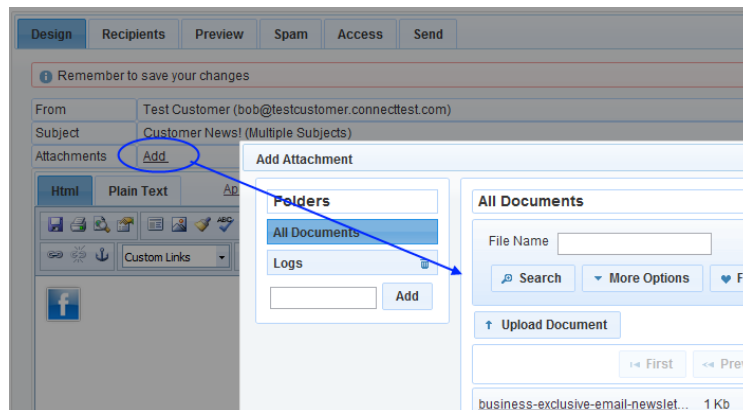
➤ Attachments

When you are designing a mailshot, before it is sent, you have the option of attaching documents from the Media Library. See Media Library section for further details. Attached documents will be sent as attachment when the mailshot is previewed and/or sent.

Adding Attachments

To add an attachment to a pre-sent mailshot, please follow the instructions below.

1. **Open** the mailshot
2. Click the **Design** tab
3. Click the **Add** link next to the **Attachments** field
4. A new window will open entitled **Add Attachment**
5. Either select a **Document** from the list by clicking on the **name** (or **Upload** a new one)



Removing Attachments

To remove an attachment, click the delete/cross icon next to the attachment name.

Linking to Documents (An Alternative to using Attachments)

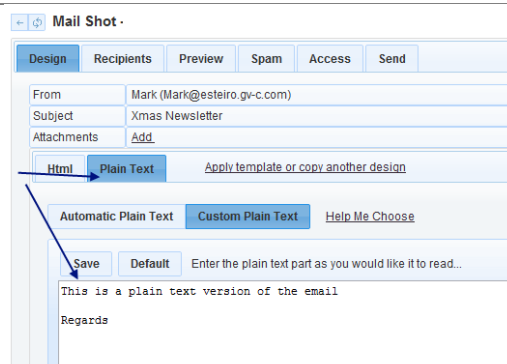
Adding attachments to your mailshot increases the overall size of the email being sent and could potentially cause it to be blocked or the attachment removed. An alternative to attaching a document is to include a click-thru link to it within the body of the email. For more information see **Adding Links**.

➤ Plain Text Version

Advanced users may wish to take advantage of the ability to edit the **Plain Text** version of the email. By default an automatic **Plain Text** version of your mail shot will be created and sent as part of the mail email to aid those recipients who choose not to view rich-content emails.

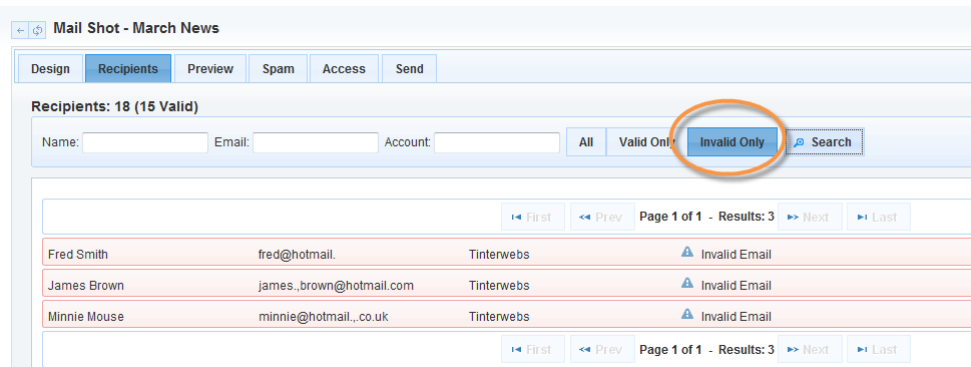
If you wish to provide your own version of the **Plain Text** part of the email follow the instructions below.

1. Click the **Design** tab under the mail shot screen
2. Click the **Plain Text** tab
3. Click the **Custom Plain Text** button
4. Enter your text in the box provided
5. Click **Save**
6. Ensure you save any design changes



➤ **Recipients**

When recipients are uploaded to Gold-Vision Connect a further validity check is run. To view Invalid Recipients select **Invalid Only** and click **search**.

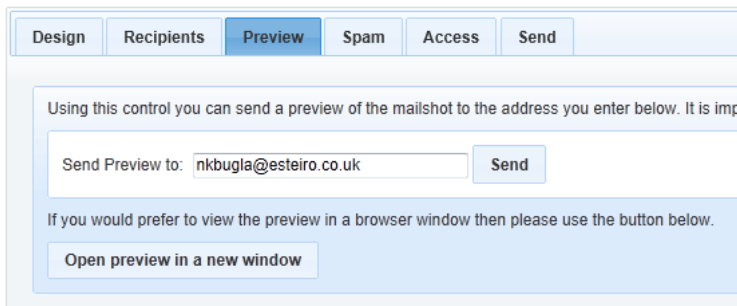


The above shows examples of invalid email addresses

➤ **Previewing a Mailshot**

One of the most important factors of sending a mailshot through Gold-Vision Connect is being able to preview emails before they are sent. This allows you to check that the design appears as you expected and that any personalised template tags are replaced correctly.

It is extremely important to send preview test emails before actually sending the mailshot. This will allow you to review how the email is delivered, rendered and displayed in your inbox. If there are any issues then they can be resolved using the designer before sending the mailshot to the final recipients.



1. From the mail shot screen click the **Preview** tab
2. Enter the email address you would like to send the test to
3. Click the **Send** button
4. After a brief pause a message will display confirming the preview has been queued.

Alternatively you can preview in a browser window:

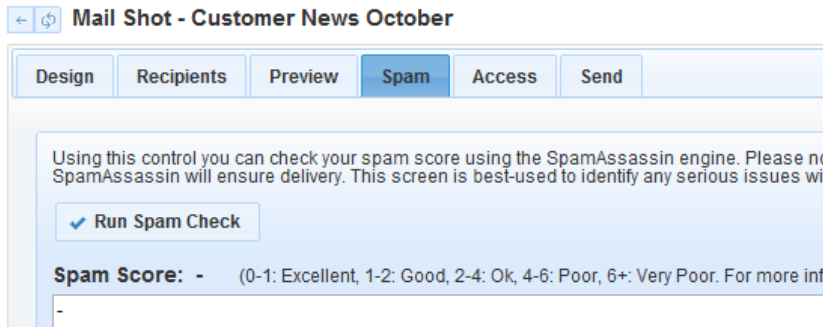
Please Note: Previews are normally delivered instantly; however, they can take several minutes depending on your mail server.

If you need to make any changes, click the design tab, make the changes, click save and send another preview. When you are happy with the mailshot, you are ready to send it.

➤ **Mailshot Spam Score**

Gold-Vision Connect runs a copy of SpamAssassin that allows you to check your mail shot for SPAM score before sending. To run a spam check follow the instructions below.

1. Ensure you have saved your current design
2. Under the mail shot screen click the **Spam** tab
3. Click the **Run Spam Check** button
4. After a few seconds the score and details will appear below



➤ **Sending a Mailshot**

Once you are happy with the design, content and layout of your email and have sent a preview you are probably ready to send it. It is important to double-check every aspect of the mailshot before sending as the send process cannot be stopped once started. To begin the sending process, open your mailshot and click the Send tab. This will navigate you to a page where you can choose various settings and ultimately send the mailshot.

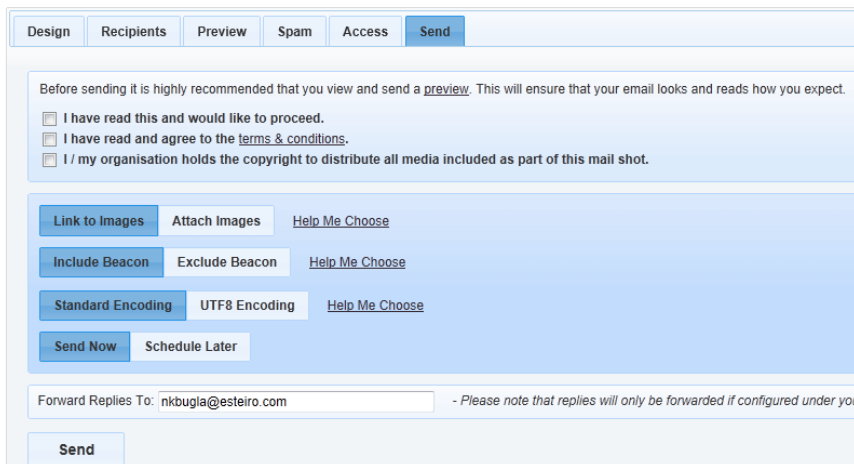
Pre-Send Options

Under the **Send** tab there are several options, these are outlined below

Confirmation Checkboxes - There are three confirmation checkboxes on the final send screen. These must all be checked to be able to send the mailshot. Please only check the options if you agree with statements next to them.

- **Link to Images** - When images are linked an online reference to the image will be included in the body of your email. This will make the email smaller in size and should also improve deliverability. When using this option recipients may be prompted to 'show images' when they read your email.
- **Include Beacon** - A beacon is a small hidden image within the mailshot body that will allow Gold-Vision Connect to track and report on the number of recipients who have opened or read your email. The inclusion of the beacon is optional because some anti-spam software will look for these; hence including one may up your spam index.
- **Standard Encoding or UTF8 Encoding** - This setting controls whether the email will be sent using either basic ASCII (standard) encoding or alternatively in UTF8/Unicode.
 - Standard Encoding.** Choose this option if you are sending an email in English or most Latin-stem languages.
 - Utf8 Encoding.** Choose this option if you are sending an email in any language that is not Latin-stem or contains non-English language characters.
- **Send Now or Schedule** - You have the option of sending the mail shot immediately or alternatively sending it later on a schedule.
- **Forward Replies Address** - If you have chosen to forward replies under 'settings' this will show the default address, this can be changed for individual mailshots if necessary.

When you are happy with your options continue with the sending process, please see below.



Sending the Mailshot

To continue the sending process, click the **Send** button at the bottom. This will prompt you to confirm before finally processing the send request. Once the mailshot has been "sent", you will gain access to the Tracking, Reporting, Bounce and Export tabs. These will allow you to track the progress and responses to your mailshot. Please note that if you chose to "schedule" the mailshot you must wait until it has sent before gaining access to the reporting tabs.

Please note only the owner of the mailshot and a Gold-Vision Connect Administrator can send a mailshot.

➤ Tracking

To open the Tracking section click the **Tracking** tab. A list of valid recipients can be viewed by selecting the relevant tab and click **search**

- **All** – A full list of all the recipients for this mailshot.
- **Delivered** - The email for this recipient has been delivered to the recipient's mail server successfully
- **Bounce** - Sending failed or the email bounced back.
- **Opened** - If a "beacon" was included when the email was **sent** and/or the recipient opened the email and all images or clicked through or replied.
- **Click-thru** - The recipient clicked on one or more **trackable** links from the mailshot body. To find out which links, click the **Reporting** tab
- **Unsubscribed** - The recipient chose to fully "unsubscribe" from all future email correspondence from you.
- **Replied** - The recipient replied to your email.
- **Forwarded** - The recipient forwarded your email using the built-in forward link.
- **Info** - Clicking on this icon will display detailed information regarding the recipient.

To view and download more advanced tracking data please see the Export section.

Design Recipients Preview Spam Access Send **Tracking** Reporting Replies Bounces Export

Valid Recipients: 8 [Need help with searching?](#)

Status: **All (8)** Delivered (6) Bounced (2) Opened (3) Click-thrus (2)

Other: Replied (1) Forwarded (2) Unsubscribed (0)

Name: Email: Account:

First Prev **Page 1 of 1 - Results: 8** Next Last

| | | | | | |
|---------------|-------------------------|-------------------------------------|--|--|--|
| Alison Turney | amtorney@esteiro.co.uk | APV Contracts Ltd | | | |
| Andy Calvert | amcalvert@esteiro.co.uk | West Haddon Business Solutions L... | | | |
| Charlie Shaw | ctshaw@esteiro.co.uk | Gold-Vision Limited | | | |
| Fred White | fwhite@esteiro.co.uk | B & Q Carlisle | | | |

➤ Reporting

To open the **Reporting** section click the **Reporting** tab. The reporting page shows graphical information regarding the tracking data as well as detailed information regarding click-thrus and read dates and times.

Mail Shot - GoldVision 6 Release Notification (08 Oct 09 12:33)

Design Recipients Preview Spam Access Send Tracking **Reporting** Replies Bounces Export

If you would like to report on individual responses, please visit the [tracking page](#).

Summary

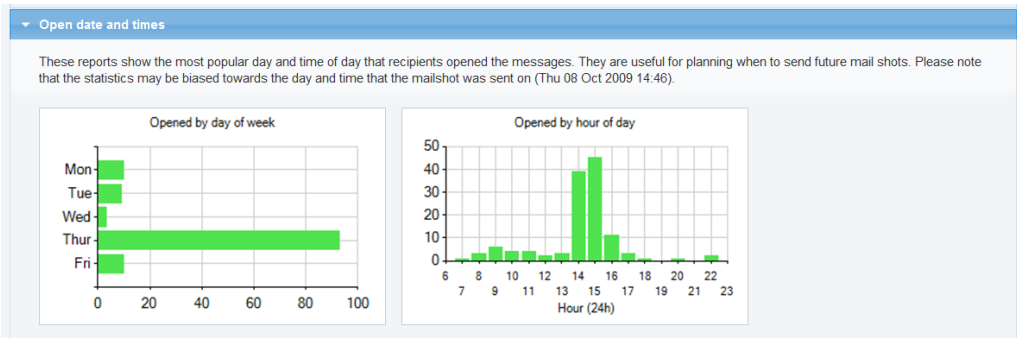
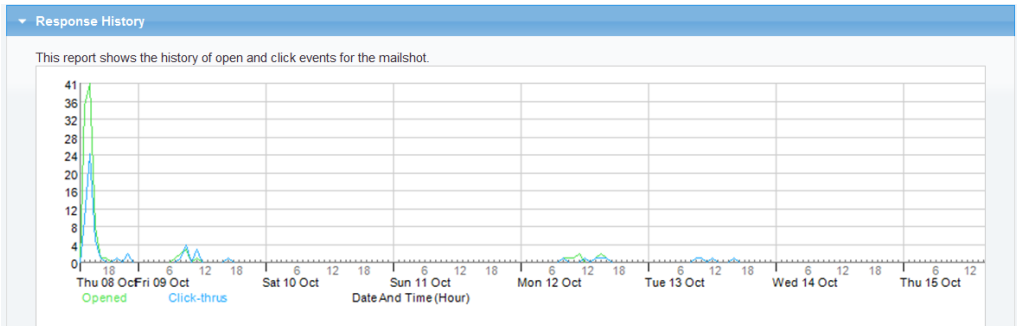
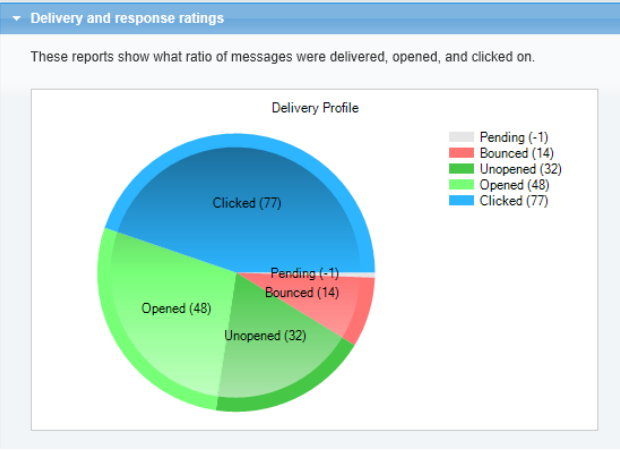
This report summarises the results of your mailshot.

| | | | |
|------------------|-----|--------|--|
| Valid Recipients | 247 | (100%) | |
| Delivered | 234 | (94%) | |
| Bounced | 14 | (5%) | |
| Opened | 125 | (50%) | |
| Clicked-Thru | 77 | (31%) | |
| Replied | 8 | (3%) | |
| Forwarded | 2 | (0%) | |
| Unsubscribed | 0 | (0%) | |

Click Thru Links

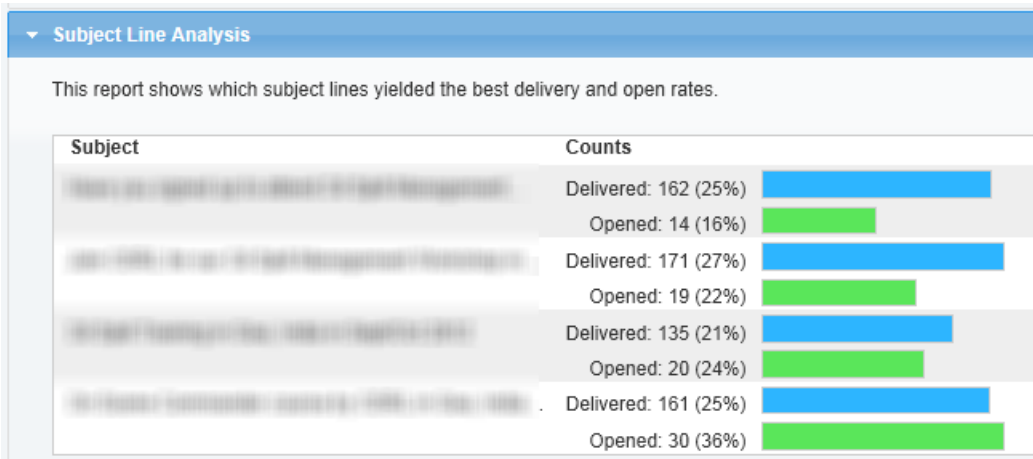
This report shows how many recipients clicked on each link within your mail shot.

| Link | Clicks |
|---|---------|
| http://www.gold-vision.co.uk | 1 (25%) |
| http://www.bbc.co.uk | 3 (75%) |



Subject Line Analysis

Compares the delivery and open rate for each subject line.



➤ Forward Links

What Happens to Forward this email clicks?

Record of clicks for **forward this email** (custom link in the mailshot) are included in the reporting area in Gold-Vision Connect

| | | | |
|--------------|---|-------|--|
| Clicked-Thru | 1 | (16%) | <div style="width: 16%; height: 10px; background-color: #0070C0;"></div> |
| Replied | 1 | (16%) | <div style="width: 16%; height: 10px; background-color: #0070C0;"></div> |
| Forwarded | 1 | (16%) | <div style="width: 16%; height: 10px; background-color: #0070C0;"></div> |

Clicking the link will provide the details of the mail recipient who has forwarded the email.

Connect cannot pick up email addresses of those forwarded to as this would be contrary to data protection best practice guidelines as it would be picking up email details of someone who has not positively opted in to your mail campaigns.

If someone who has been forwarded to then emails the Connect from address this email will be lost as they are not a valid recipient of the mail campaign. This is to protect against spam and to follow best practice guidelines.

➤ Unsubscribers

What Happens to Unsubscribers?

Recipients that have "fully" unsubscribed through Gold-Vision Connect will be synchronised back into Gold-Vision as part of the above process. The following changes are made automatically in Gold-Vision against the **Contact**.

- The **Email Contact Preference** will be un-checked. This will mean they will be an invalid recipient in email Campaigns
- A new **Note** will be added against the contact describing that they have chosen to unsubscribe via Gold-Vision Connect

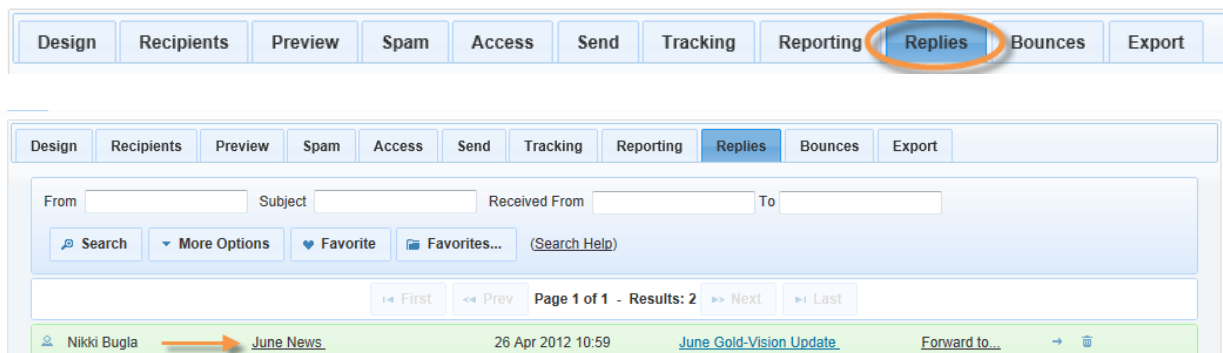
See Contact section for more info on Unsubscribed Contacts

➤ Replies

Mail shot Replies allows the viewing of emails that have been sent in response to the mail shot.

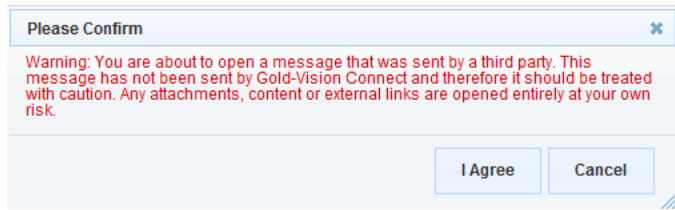
Viewing and Deleting Mail Shot Replies

To view a list of Replies for the Mailshot, click the **Replies** tab.



To view a mail shot Reply, simply click on the underlined Subject of the e-mail. If you are happy to allow

the e-mail to open, then click on **I Agree** to accept the risk of opening a potentially unsafe e-mail, and it will open in a new window.



To forward the email click Forward to and enter an email address

To delete the mail shot reply, click the delete icon: 

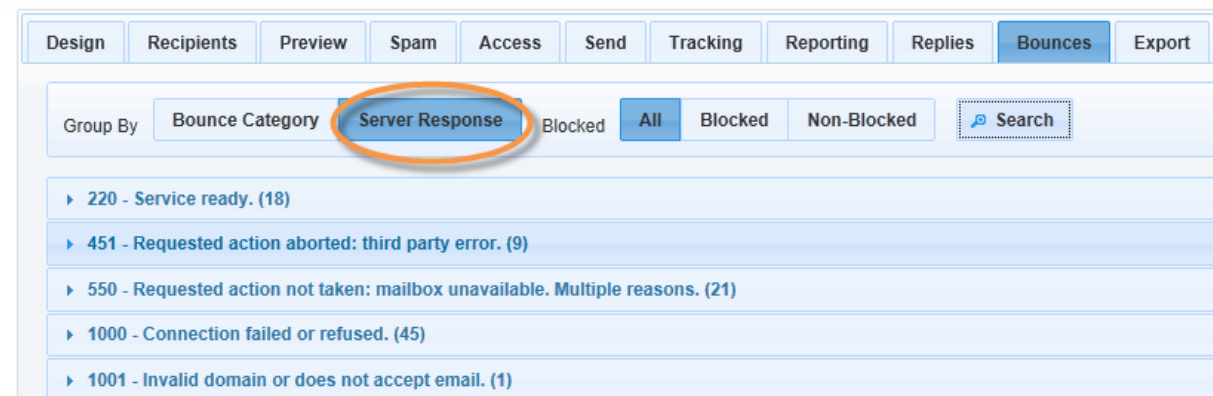
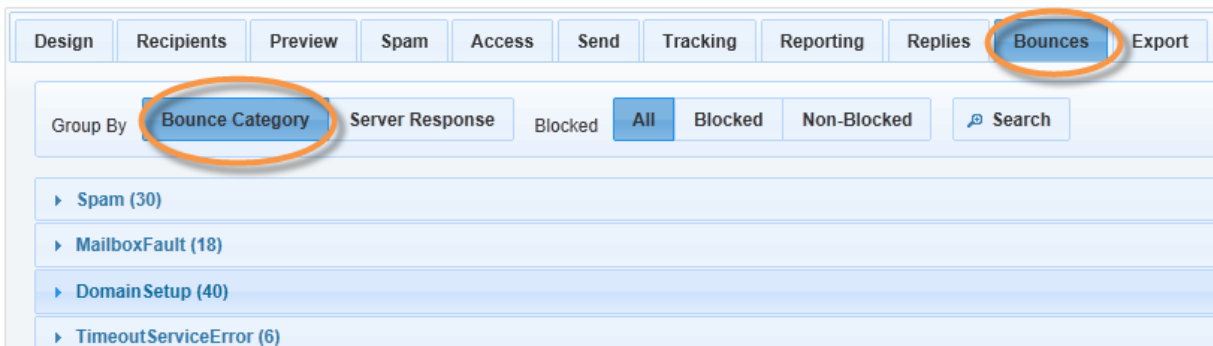
Please Note: Gold-Vision Connect does not store replies to mail shots indefinitely. Any mail shot Reply more than three months old will be permanently deleted.

To be classed as a Reply the recipient will have clicked Reply and the body of the original mailshot will therefore be included as part of the Reply

If an email has been sent to the Connect email address e.g. info@esteiro.gv-c.com these emails can be viewed in the replies section – Mailshots – Replies. For more information see below

➤ **Bounces**

You can review the reason for messages bouncing by clicking the Bounce tab. Select either Bounce Category or Server Response.



➤ Exporting data

Download/Export Data

If you would like to export your Connect data into CSV format then click the **Export** tab from a sent mail shot. Please note that you will only be able to do this after the mail shot has completed sending.

Design Recipients Preview Spam Access Send Tracking Reporting Replies Bounces **Export**

Here you can download your tracking information to Excel in CSV format.

- Download Tracking Data to Excel
- Download Bounces to Excel
- Download Click-Thrus to Excel

Tracking Data

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q |
|---|------------|-----------|------------|----------------------|-------|------|------------------|--------|-----------|----------|--------|------------------|-----------|------------------|-----------|---------|-----------|
| 1 | First Name | Last Name | Account | Email | Phone | Sent | Date Sent | Bounce | Bounce Cc | Bounce M | Opened | Opened Date | Clickthru | Date Clicked | Unsubscri | Replied | Forwarded |
| 2 | Alison | Turney | Gold-Visic | amturney@esteiro.c | | Yes | 17/02/2011 11:09 | No | | | Yes | 17/02/2011 11:18 | No | | No | Yes | No |
| 3 | Andrew | Fiendley | Gold-Visic | ajfiendley@esteiro.c | | Yes | 17/02/2011 11:09 | No | | | No | | No | | No | No | No |
| 4 | Charlie | Shaw | Gold-Visic | ctshaw@esteiro.co.i | | Yes | 17/02/2011 11:10 | No | | | Yes | 17/02/2011 11:10 | Yes | 17/02/2011 11:10 | No | No | No |
| 5 | Jiggy | Keith | Gold-Visic | jkeith@esteiro.co.ul | | Yes | 17/02/2011 11:09 | No | | | No | | No | | No | No | No |
| 6 | Jonathan | Davey | Gold-Visic | jwdavey@esteiro.cc | | Yes | 17/02/2011 11:09 | No | | | No | | No | | No | No | No |
| 7 | Nikki | Bugla | Gold-Visic | nbugla@esteiro.co | | Yes | 17/02/2011 11:09 | No | | | Yes | 17/02/2011 11:17 | Yes | 17/02/2011 11:17 | No | No | No |
| 8 | | | | | | | | | | | | | | | | | |

Bounces

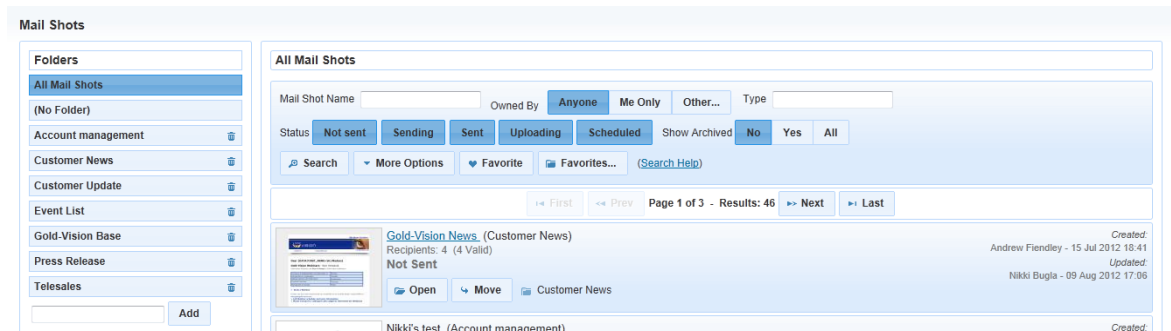
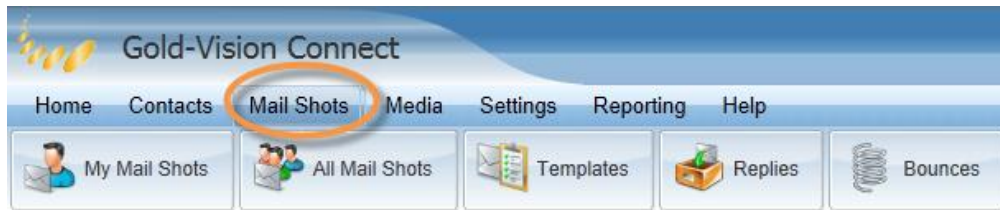
| | A | B | C | D | E | F | G | H | I | J |
|---|------------|-----------|------------|---------------------|-------|----------|---|---|---|---|
| 1 | First Name | Last Name | Account | Email | Phone | SMTP Cod | Response Message | | | |
| 2 | Joe | Bloggs | Bloggs Ltd | joe.bloggs@bloggs.c | | 1000 | A connection attempt failed because the | | | |

Click-Thru Data

| | A | B | C | D | E | F | G | H | I | J |
|---|------------|-----------|------------|---------------------|-------|------------|------------------|------------------------------|---|---|
| 1 | First Name | Last Name | Account | Email | Phone | Account M | Date Clicked | Address | | |
| 2 | Charlie | Shaw | Gold-Visic | ctshaw@esteiro.co.i | | Charlie Sh | 17/02/2011 11:10 | http://www.gold-vision.co.uk | | |
| 3 | Nikki | Bugla | Gold-Visic | nbugla@esteiro.co | | Charlie Sh | 17/02/2011 11:17 | http://www.bbc.co.uk | | |
| 4 | | | | | | | | | | |

➤ Viewing Mailshots

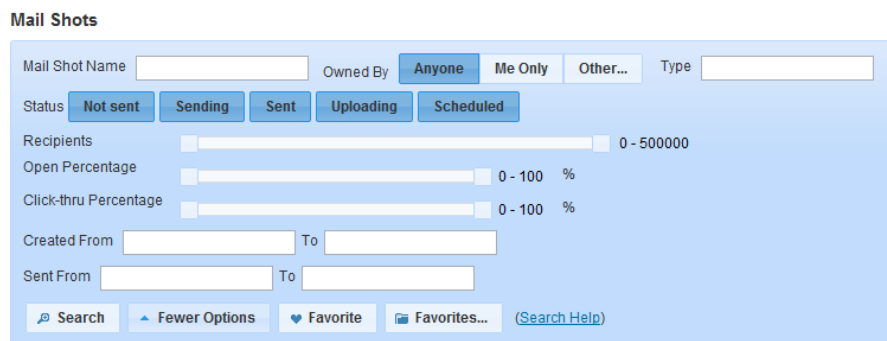
To view a list of mailshots click the **Mail shots** menu and the **All Mail shots** from the sub menu that appears. If you prefer to just see your own mail shots then select **My Mail Shots** instead.



Searching Mail Shots

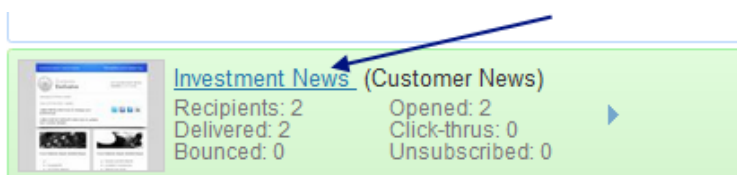
Mail shots can be searched and filtered by using the standard search control at the top of the screen. Please note there are numerous additional search options available under the **More Options** button.

The **Recipients**, **Open** and **Click-Thru** sliders help you search for large, small or particularly effective mail shots. The date range and status filters allow you to search for a mailshot that was uploaded previously and/or is in a particular state.



Opening a Mail Shot

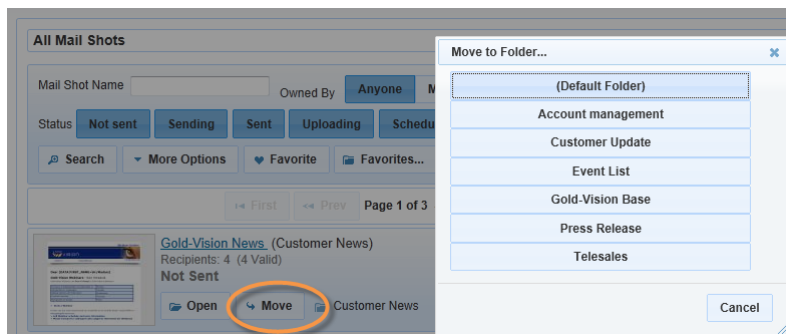
To open a mail shot item simply click on the name link that appears at the top of the mail shot list box. The image below shows where to click.



Please Note: You cannot open mail shots that are currently uploading.

Folder Organisation

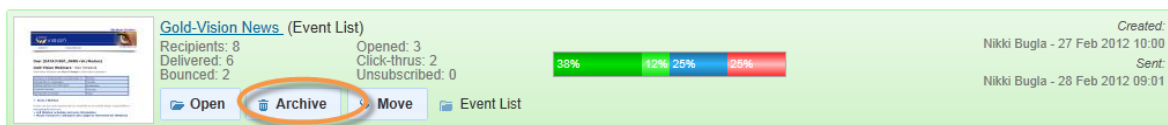
Folders can be created in mailshots and templates to enable you to organise them. Click **Move** then select a folder to move the mailshot to.



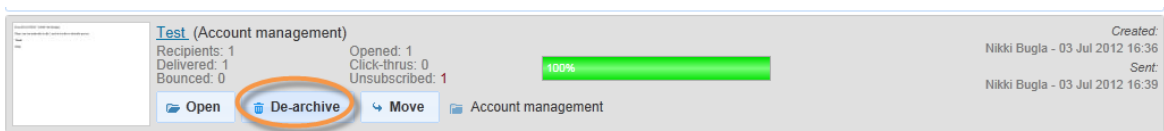
New uploads will be automatically saved in the correct folder, matching the Campaign Type from Gold-Vision.

Archive Mailshots

Sent Mailshots can be archived. Archived mailshots are hidden from the default list view, however they can be included in the search if required.

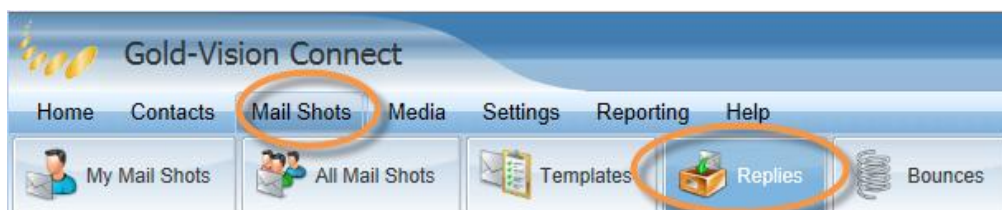


Click de-archive to return the mailshot from the archive



➤ Viewing All Replies

Replies can be viewed globally from the **Replies** tab in the Mailshot section:



Replies

From Subject Received From To

[\(Search Help\)](#)

Page 1 of 1 - Results: 10

| | | | | | | | |
|--|-----------------|-------------------------------|-------------------|------------------------------|-------------------------------|--|--|
| | Alison Turney | Newsletter | 04 Nov 2010 14:52 | Newsletter | Forward to... | | |
| | Alison Turney | Patient News | 04 Nov 2010 11:58 | PSF Test | Forward to... | | |
| | Alison Turney | November news | 04 Nov 2010 11:02 | Nikki's test | Forward to... | | |
| | Andrew Fiendl3y | Newsletter | 04 Nov 2010 10:48 | Nikki's test | Forward to... | | |

From the **Reply** list screen you can:

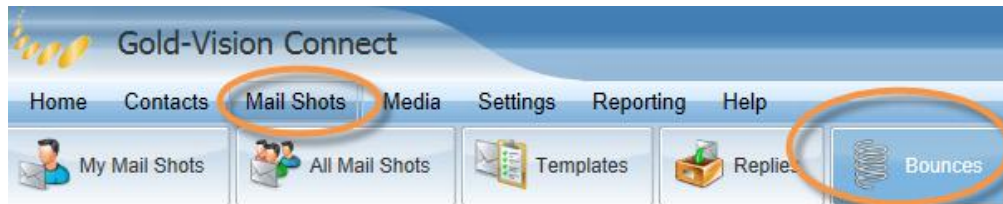
- 1) **Open** each reply
- 2) Click through to the related Mailshot
- 3) **Forward** the email reply to another email such as one of your colleagues who you may wish to make contact to the recipient quickly.

Replies can also be viewed in the same way for each individual **Mail Shot** from the **Replies** tab:

See **Administration Settings** – Mailshots for more information about forwarding replies.

➤ **Viewing All Bounces**

Bounces can be viewed globally from the **Bounces** tab in the Mailshot section:



Bounces can be view by Bounce Category or by Server Response

Bounce Backs

Group By: Blocked

Mail Shot Owner: Mail Shot Type:

Sent From: To:

- ▶ 550 - Requested action not taken: mailbox unavailable. Multiple reasons. (59)
- ▶ 553 - Requested action not taken: mailbox name not allowed. (1)
- ▶ 1001 - Invalid domain or does not accept email. (3)

Bounce Backs

Group By: Blocked

Mail Shot Owner: Mail Shot Type:

Sent From: To:

- ▶ Spam (3)
- ▶ MailboxFault (55)
- ▶ DomainSetup (2)
- ▶ UnknownReason (17)

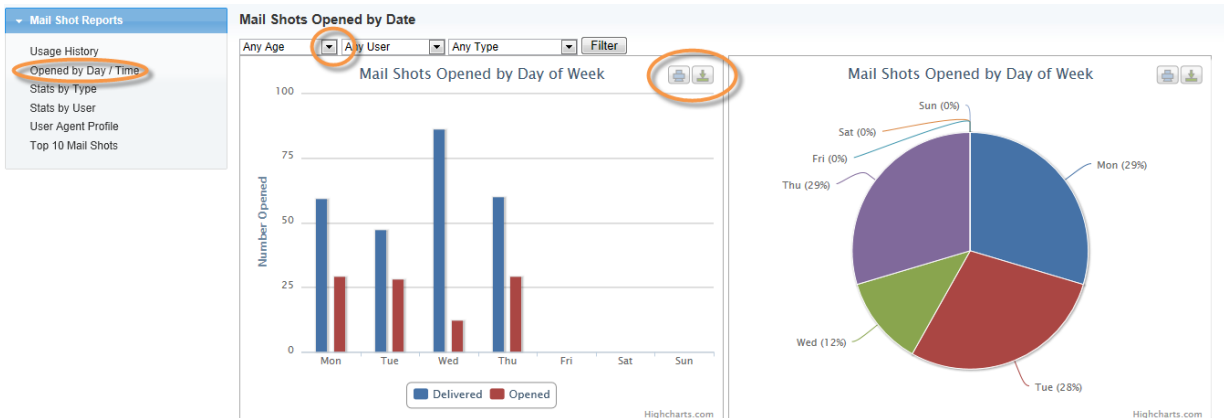
➤ Reporting



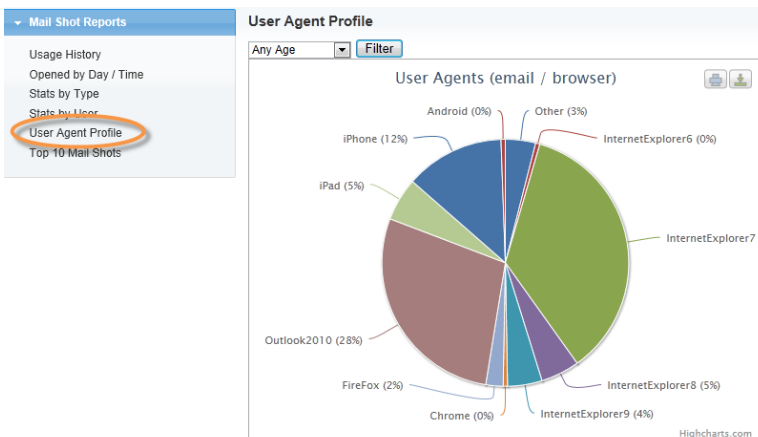
Reports can be generated across all your Connect data.



Charts can be filtered and downloaded as images to be added to your reports and printed.



User Agent Profile – this report shows you which Browser/device your recipients are viewing their mailshots in.



➤ Synchronising with Gold-Vision

Synchronising with Gold-Vision

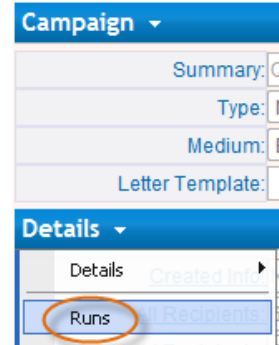
One of Gold-Vision Connect's most powerful features is the automatic synchronisation of data back into Gold-Vision. For mailshots this is done in the form of tracking (read, click, bounce...) data back into the Gold-Vision Campaign Run itself.

You will be able to monitor the data from within the **Campaign Runs** screen from within a **Campaign**.

➤ Viewing Campaign Records within Gold-Vision

The primary location for viewing Gold-Vision Connect Mailshot data in Gold-Vision is under the **Campaign Run**

1. Open **Gold-Vision**
2. Click **View > Campaigns** or click the **Campaigns** icon
3. A list of Campaigns will be displayed
4. Click a **Campaign** that you have sent via Gold-Vision Connect
5. The Campaign will open in a new window
6. From the lower **Details/Blue-bar** Item menu select **Runs**
7. Click on a **Run** that was sent to Gold-Vision Connect
8. The **Recipients** list will open in a new window



The tracking data will appear next to the recipients in this list

| Date Run | Sent | Medium | Connect Upload Status | Connect | Delete |
|---------------------|------|----------------------------|-----------------------|---------|--------|
| 29/11/2010 13:41:22 | 5 | Email 1 (Gold-Vision Co... | Complete | All | |

Quarter 4 Newsletter - Recipients

[Click here to view Click-Thru data](#)

Gold-Vision Connect Recipients | All

| Contact | Account | Email 1 | Sent | Read | Clicked | Unsub This | Unsub All | Replied |
|---------------|----------------------------|-------------------------|------|------|---------|------------|-----------|---------|
| Alison Turney | Oil Spill Response Limi... | amturney@esteiro.co.uk | ✓ | ✓ | ✓ | - | - | ✓ |
| Andrew Test | Gold-Vision | afendley@googlemail... | ✓ | ✓ | - | - | - | - |
| Charlie Shaw | Gold-Vision | ctshaw@esteiro.co.uk | ✓ | ✓ | ✓ | - | - | - |
| Jiggy Keith | Gold-Vision | jkeith@esteiro.co.uk | ✓ | - | - | - | - | - |
| Mark Vernon | Gold-Vision | mjvermon@gold-vision... | ✓ | - | - | - | - | - |
| Nikki Bugla | Gold-Vision | nkbugla@esteiro.co.uk | ✓ | ✓ | ✓ | - | - | - |

Records 1 to 6 of 6

Click on the **Gold-Vision Connect Run**. This will show the recipients and their click-thru information

December News - Recipients

[Click here to view Click-Thru data](#)

Gold-Vision Connect Recipients | All

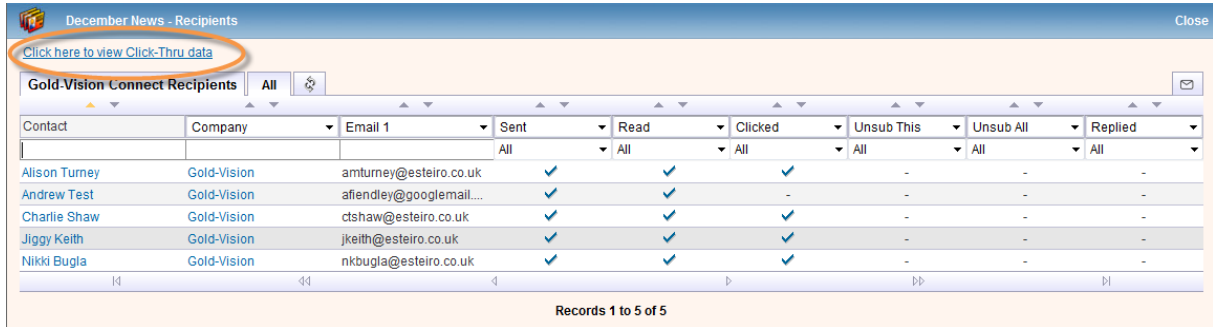
| Contact | Account | Email 1 | Sent | Read | Clicked | Unsub This | Unsub All | Replied |
|---------------|-------------|------------------------|------|------|---------|------------|-----------|---------|
| Alison Turney | Gold-Vision | amturney@esteiro.co.uk | ✓ | ✓ | ✓ | - | - | - |
| Andrew Test | Gold-Vision | afendley@googlemail... | ✓ | ✓ | - | - | - | - |
| Charlie Shaw | Gold-Vision | ctshaw@esteiro.co.uk | ✓ | ✓ | ✓ | - | - | - |
| Jiggy Keith | Gold-Vision | jkeith@esteiro.co.uk | ✓ | ✓ | ✓ | - | - | - |
| Nikki Bugla | Gold-Vision | nkbugla@esteiro.co.uk | ✓ | ✓ | ✓ | - | - | - |

Records 1 to 5 of 5

Using the lists options the list can be filtered down and another campaign run by clicking the campaign icon.

Viewing Click-Thru Data

Click the link – Click here to view **Click-Thru** data

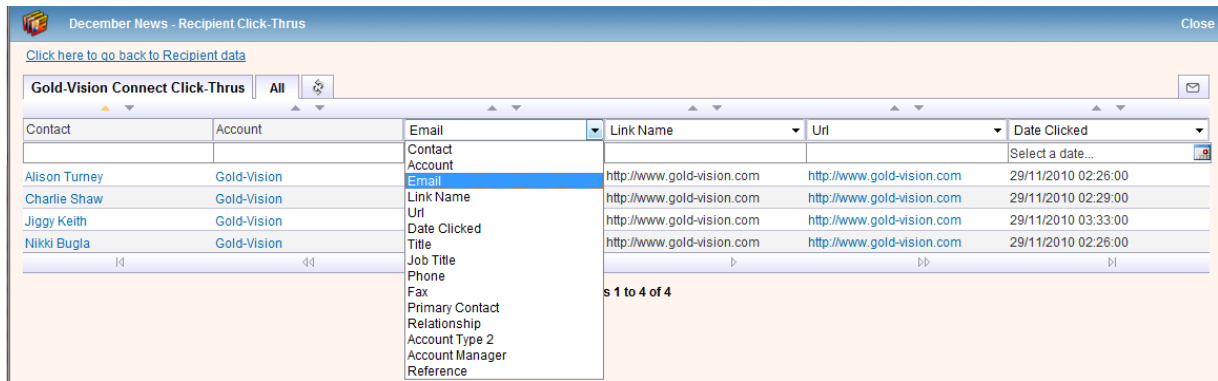


| Contact | Company | Email 1 | Sent | Read | Clicked | Unsub This | Unsub All | Replied |
|---------------|-------------|-------------------------|------|------|---------|------------|-----------|---------|
| Alison Turney | Gold-Vision | amtorney@esteiro.co.uk | ✓ | ✓ | ✓ | - | - | - |
| Andrew Test | Gold-Vision | afendley@googlemail.... | ✓ | ✓ | - | - | - | - |
| Charlie Shaw | Gold-Vision | ctshaw@esteiro.co.uk | ✓ | ✓ | ✓ | - | - | - |
| Jiggy Keith | Gold-Vision | jkeith@esteiro.co.uk | ✓ | ✓ | ✓ | - | - | - |
| Nikki Bugla | Gold-Vision | nbugla@esteiro.co.uk | ✓ | ✓ | ✓ | - | - | - |

Records 1 to 5 of 5

This will show you all the **Click-Thru** data from Gold-Vision Connect.

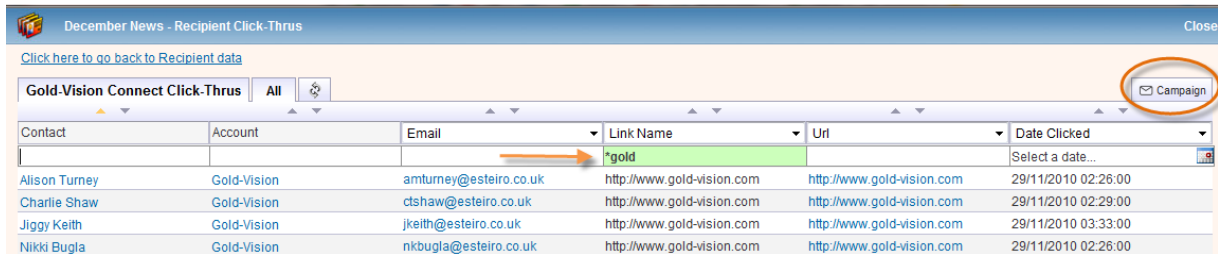
Use the list options to filter down and create a follow up Campaign as above.



| Contact | Account | Email | Link Name | Url | Date Clicked |
|---------------|-------------|------------------------|----------------------------|----------------------------|---------------------|
| Alison Turney | Gold-Vision | amtorney@esteiro.co.uk | http://www.gold-vision.com | http://www.gold-vision.com | 29/11/2010 02:26:00 |
| Charlie Shaw | Gold-Vision | ctshaw@esteiro.co.uk | http://www.gold-vision.com | http://www.gold-vision.com | 29/11/2010 02:29:00 |
| Jiggy Keith | Gold-Vision | jkeith@esteiro.co.uk | http://www.gold-vision.com | http://www.gold-vision.com | 29/11/2010 03:33:00 |
| Nikki Bugla | Gold-Vision | nbugla@esteiro.co.uk | http://www.gold-vision.com | http://www.gold-vision.com | 29/11/2010 02:26:00 |

s 1 to 4 of 4

For example you may wish to filter the list down by a specific link, in this example to the Training Schedule page on a website:



| Contact | Account | Email | Link Name | Url | Date Clicked |
|---------------|-------------|------------------------|----------------------------|----------------------------|---------------------|
| Alison Turney | Gold-Vision | amtorney@esteiro.co.uk | *gold | http://www.gold-vision.com | 29/11/2010 02:26:00 |
| Charlie Shaw | Gold-Vision | ctshaw@esteiro.co.uk | http://www.gold-vision.com | http://www.gold-vision.com | 29/11/2010 02:29:00 |
| Jiggy Keith | Gold-Vision | jkeith@esteiro.co.uk | http://www.gold-vision.com | http://www.gold-vision.com | 29/11/2010 03:33:00 |
| Nikki Bugla | Gold-Vision | nbugla@esteiro.co.uk | http://www.gold-vision.com | http://www.gold-vision.com | 29/11/2010 02:26:00 |

Campaign

Click Campaign to create a follow up Campaign based on filtered click-thru data.

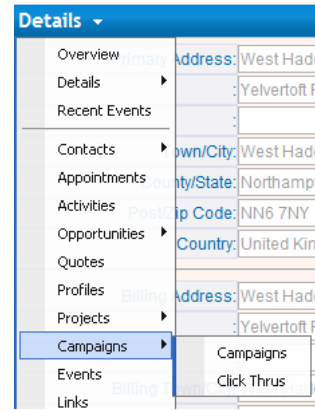
➤ Viewing Connect Data in Gold-Vision

Select the **Account** or **Contact** in Gold-Vision

Click on the details menu and select **Campaigns**

Select **Campaigns** to see the all Campaigns which this Account has been included in

Select **Click-Thrus** to see all Action links which have been clicked in a Connect Mailshot

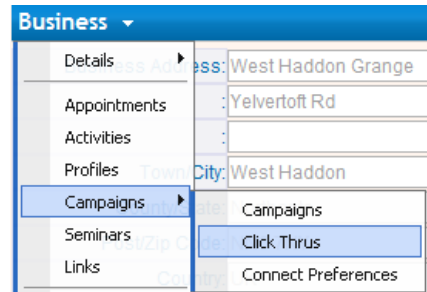


| Account | | Edit | | Close | |
|------------------------|----------------------|-------------|--------------------------------|-------|--|
| Account Name: | Gold-Vision | Main Phone: | +44(0)113 2000 225 (** TPS **) | | |
| Primary Contact: | Charlie Shaw | Main Fax: | +44 (0) 1788 510 861 | | |
| Primary Contact Phone: | +44 (0) 1788 511 110 | Web Site: | www.gold-vision.com | | |
| Account Manager: | Charlie Shaw | Alert: | Not Set | | |

| Campaign | Contact | Email | Link Name | Url | Date Clicked |
|-----------------------|---------------|------------------------|---------------------------|---------------------------|---------------------|
| January News | Alison Turney | amturney@esteiro.co.uk | http://www.bbc.co.uk | http://www.bbc.co.uk | 05/01/2011 03:06:00 |
| Gold-Vision Decemb... | Charlie Shaw | ctshaw@esteiro.co.uk | http://www.gold-vision... | http://www.gold-vision... | 07/12/2010 03:52:00 |
| December News | Jiggy Keith | jkeith@esteiro.co.uk | http://www.gold-vision... | http://www.gold-vision... | 29/11/2010 03:33:00 |
| December News | Charlie Shaw | ctshaw@esteiro.co.uk | http://www.gold-vision... | http://www.gold-vision... | 29/11/2010 02:29:00 |
| December News | Alison Turney | amturney@esteiro.co.uk | http://www.gold-vision... | http://www.gold-vision... | 29/11/2010 02:26:00 |

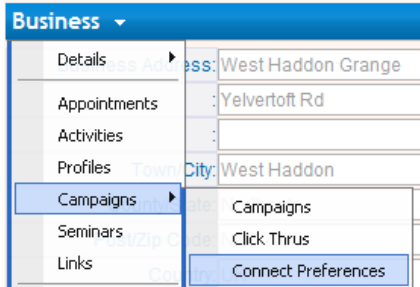
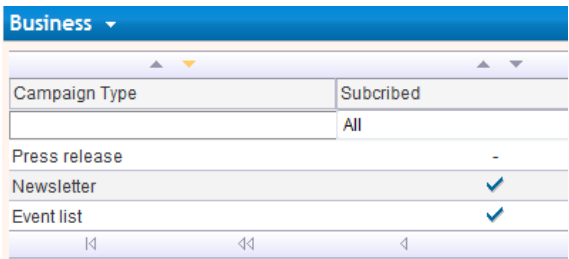
Using the lists options the list can be filtered and items can be selected

Viewing **Click-Thru** data from a **Contact** record



| Campaign | Link Name | Url | Date Clicked |
|------------------------|----------------------------|----------------------------|---------------------|
| December News | http://www.gold-vision.com | http://www.gold-vision.com | 29/11/2010 02:26:00 |
| Quarter 4 Newsletter | http://www.gold-vision.com | http://www.gold-vision.com | 25/11/2010 04:36:00 |
| Gold-Vision Newsletter | http://www.gold-vision.com | http://www.gold-vision.com | 23/11/2010 11:25:00 |

Using the lists options the list can be filtered and items can be selected

| | |
|--|--|
| <p>Viewing Connect Preferences</p> |  |
| <p>In this example the recipient has selected to receive Newsletters and Event Lists but not Press Releases.</p> |  |

➤ **Contacts**

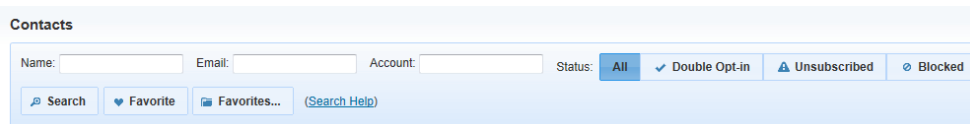


A list of all contacts uploaded to Connect can be found under the **Contacts** menu.

1. Click the **Contacts** from the main menu
2. Click the **Contacts** sub-menu item
3. A list of your **Contacts** will load

You can use the standard search facility at the top of the screen to filter the list of Contacts. As well as name, email and other details you can also filter by the contact **status**.

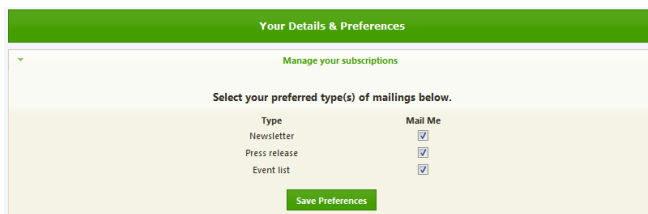
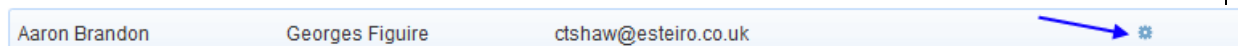
- **All** - Will display all contacts that match your other filters
- **Double Opt-In** - Will only display contacts who have double-opted-in
- **Unsubscribed** - Will only display contact who have fully unsubscribed from your mailings
- **Blocked** – This will show all contacts where the email has bounced 3 times on 3 separate mailshots



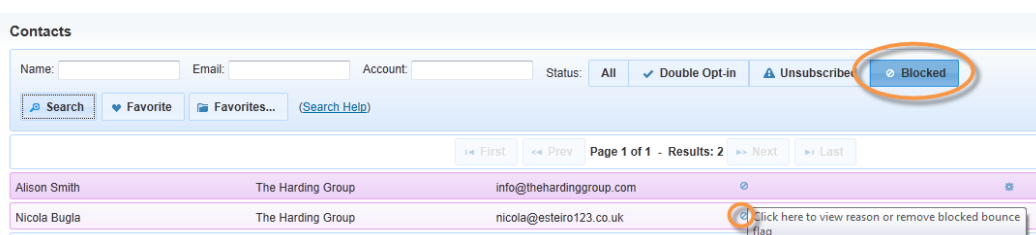
Favorite lists can also be saved for easy reference, for example you could have a favourite list that has been filtered by email address such as “Hotmail” or a favorite list filtered by an Account name.

Viewing and Managing Preferences

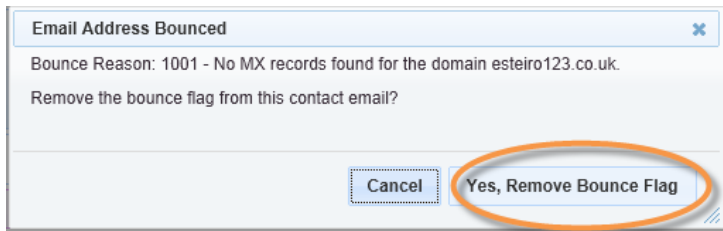
As part of your mail shot design you are able to allow your recipient contacts to update their details and preferences. To view the screen that a particular contact will see when managing their preferences click the **cog icon** that is highlighted in the image below.



Reviewing and Unblocking Blocked Contacts



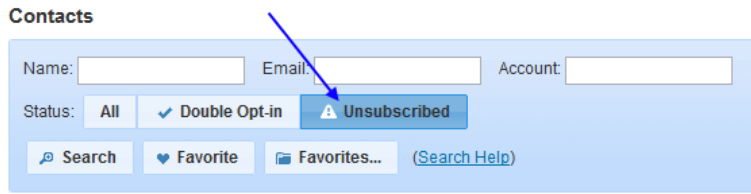
Click the icon to view the reason the contact is blocked. Removing the Bounce Flag will allow Connect to attempt to send an email to this recipient in a future mailshot.



➤ **Unsubscribed contacts**

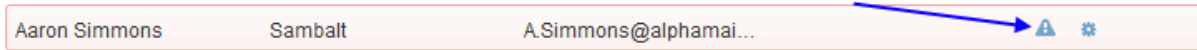
From the list of all **Contacts** it is possible to filter by status of **Unsubscribed**. Contacts who have **unsubscribed** are those who have actively requested not to receive your mailings in future.

A contact can unsubscribe by clicking one of the links at the bottom of any of your mail shots from Gold-Vision Connect. Once a contact has unsubscribed you are unable to contact them via email through Gold-Vision Connect until such time that they choose to re-subscribe.

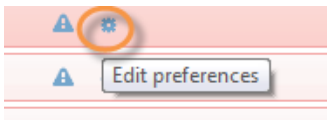


Which Mail Shot?

To find out which mail shot a particular contact unsubscribed from, click on the **alert** icon that is depicted in the image below.



Re-subscribe



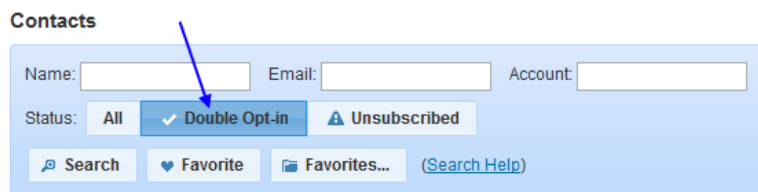
Click on the Edit Preferences icon to **re-subscribe** recipients to your mailings

➤ **Double Opt-In contacts**

From the list of all Contacts it is possible to filter by status of **Double-Opt-In**. Contacts who have double-opted-in are those who have actively clicked on a **Double-Opt-in** link from one of your mail shots. You may choose to only email contacts who have opted in using this preference to satisfy and internal or external compliance request.

To learn more about adding double-opt-in links please see the mail shot custom links page.

Please Note: The use of the double-opt-in functionality is entirely optional.

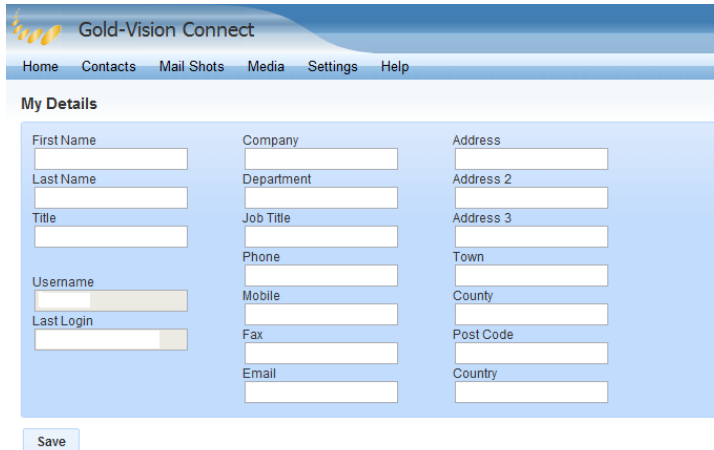


➤ **User Settings**



My Details

View and edit your user details



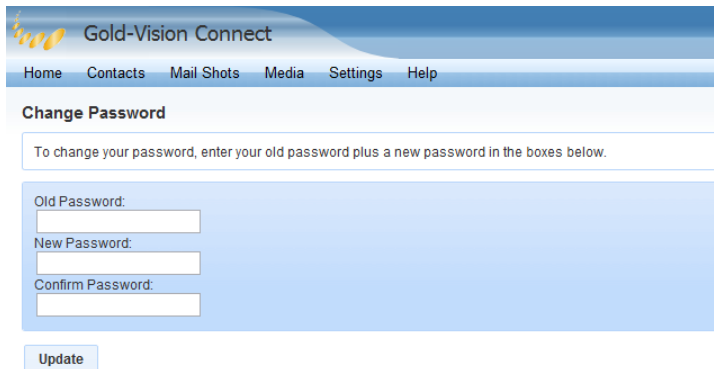
| | | |
|------------|------------|-----------|
| First Name | Company | Address |
| Last Name | Department | Address 2 |
| Title | Job Title | Address 3 |
| Username | Phone | Town |
| Last Login | Mobile | County |
| | Fax | Post Code |
| | Email | Country |

Save

To edit your details change the required fields and click **Save**. The Username and Last Login fields cannot be changed by the user.

Password

To change your password enter the required information and click **Update**:



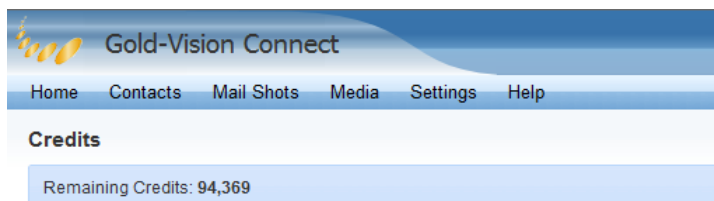
To change your password, enter your old password plus a new password in the boxes below.

| |
|-------------------|
| Old Password: |
| New Password: |
| Confirm Password: |

Update

Credits

This shows your remaining credits. 1 credit = 1 mailshot



Remaining Credits: 94,369

If you have a query regarding your remaining credits, please contact your Gold-Vision Connect system administrator.

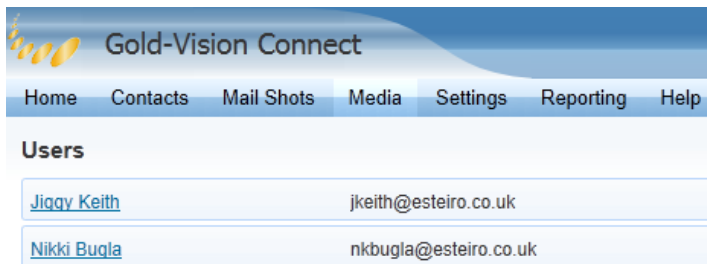
➤ Administrator Settings

Please note: only Gold-Vision Connect Administrators have access to these settings



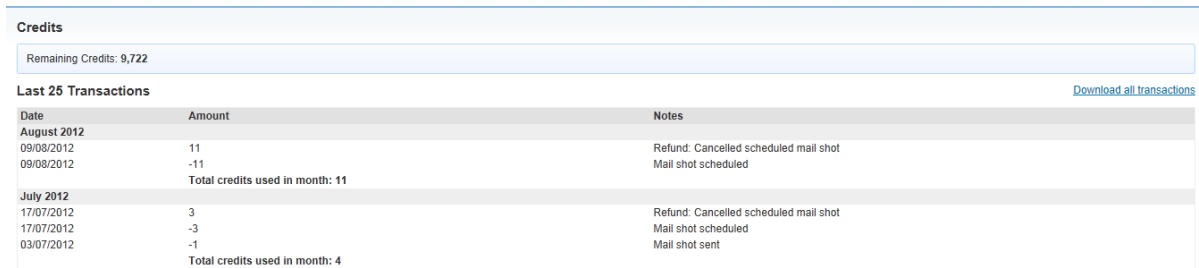
Users

This shows a list of Users on your Gold-Vision Connect. To view or edit a user's details simply click on their name.



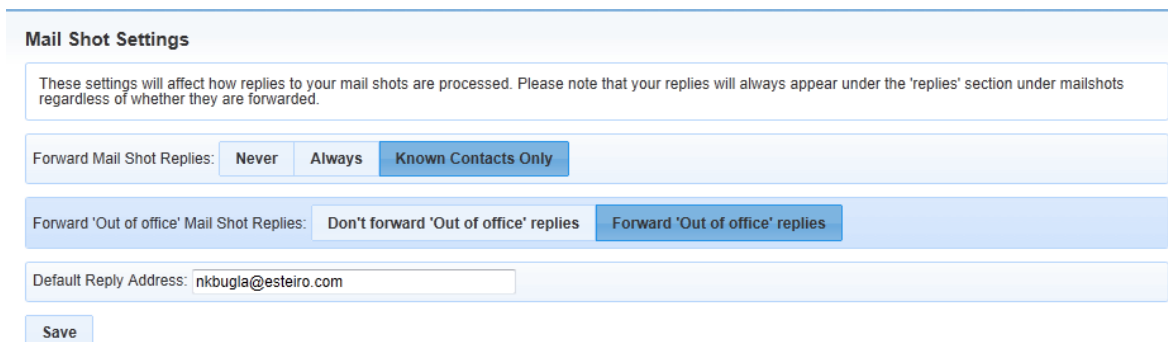
Passwords – Edit your password as per User settings

Credits – View the remaining credits and the latest credit transaction history. This data can also be downloaded to CSV.



Mailshots

Replies to your Mailshots and emails sent to your Connect domain can be **forwarded** to a nominated email address as per the settings below. This is set up as the Default Reply Address.



From the **Settings> Mailshots** area you can:

- 1) Decide the level of Replies you wish to receive: Never/ Always/ Known Contacts Only (valid Connect recipients).

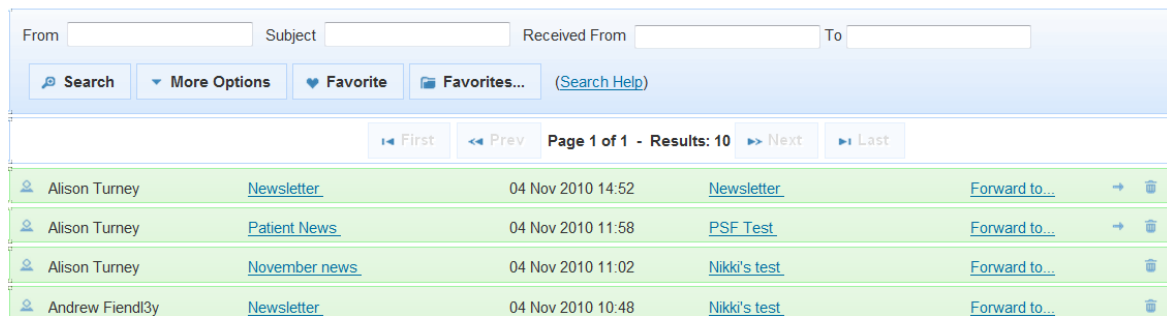
2) Decide whether or not to have the Out of Office Replies forwarded. By default they are forwarded.

3) If you opt to receive Connect Mailshot replies you can set the Default Reply Address that you wish replies to be forwarded to. Please note that this does not need to be the same as the 'from address' that the recipient can see. This can also be changed for each individual mailshot.

Please note: your replies will always appear under the **Replies** section under **Mail Shots** regardless of whether they are forwarded.



Replies



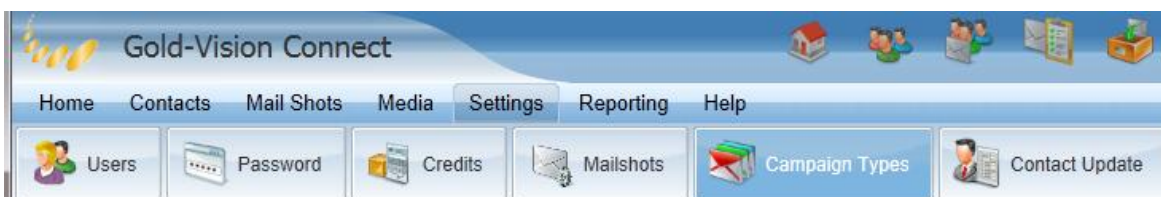
From the Reply list screen you can:

- 1) **Open** each reply
- 2) **Click** through to the related Mailshot
- 3) **Forward** the email reply to another email such as one of your colleagues who you may wish to make contact to the recipient quickly.

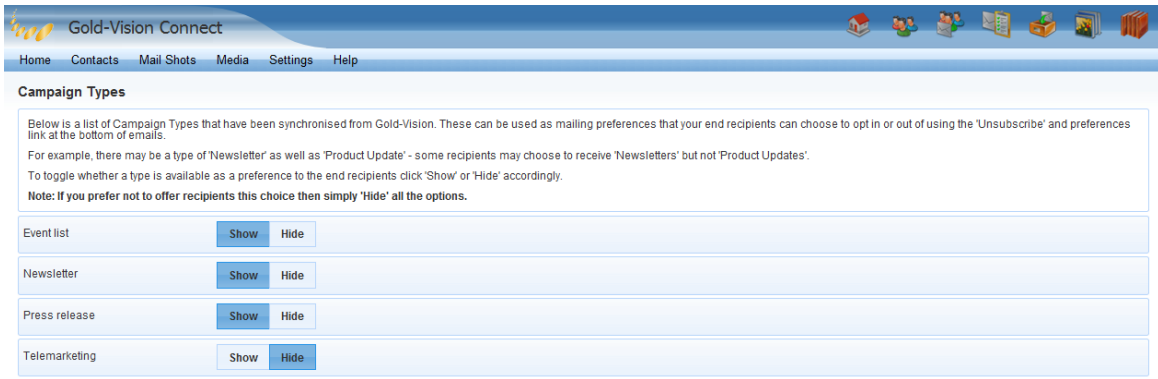
Replies can also be viewed in the same way for each individual **Mail Shot** from the **Replies** tab – see Mail Shots section.

➤ Contact preferences

This area allows you to provide advanced selection on mail recipient preferences.

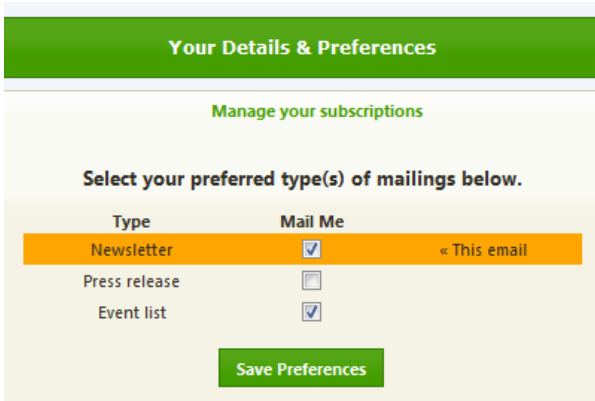


The Campaign types which are set up in your Gold-Vision system will be synchronised into your **Connect Campaign Types** area:

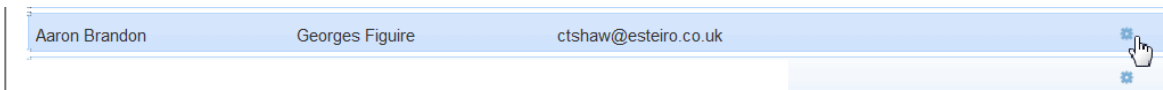


A Connect Administrator can then opt to **Show** or **Hide** which campaign preferences are available when the **Contact Preference** Custom Link has been added to your Mail Shot design.

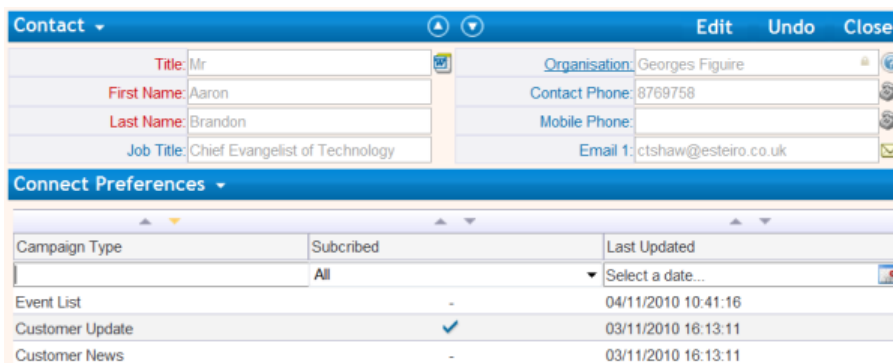
Connect Mail shot recipients can then edit their preferences as they wish:



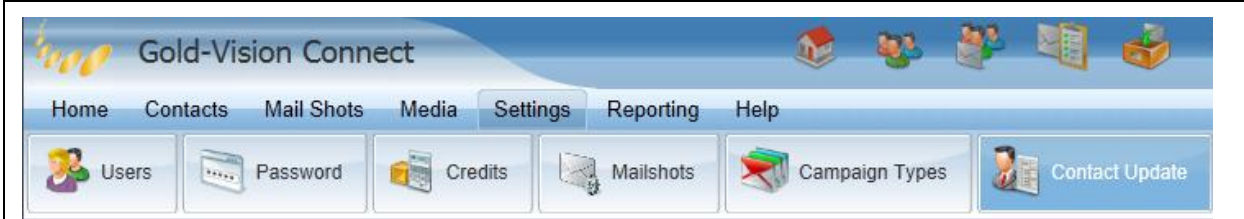
This information is then stored within the Connect database and can be viewed from the Contacts list by clicking on the **Edit preferences** icon:



Individual preferences updated in Connect will then automatically synchronise into your Gold-Vision system to ensure that future Marketing Campaigns respect selected preferences.



➤ Contact Update



You can choose whether you want to allow contacts to update their own details, or simply view them so that they can inform you of changes by a different method.

Connect Administrators can choose which fields to make available for recipients to update when the **Contact Update** Custom Link has been added to your Mail Shot design.

Contact Update

Gold-Vision Connect supports the ability for Contact recipients to update their contact details via a link you can embed in your mail shot design. This screen allows you to configure if and how the contact details update screen will appear.

Change the order in which the fields appear by dragging and dropping them on the screen. Rename the label that will be displayed using the text box provided. Finally, toggle whether the field is hidden, visible-readonly or visible-editable.

Note: If you prefer not to use the Contact Update functionality please use the 'Hide All Fields' option below, which will disable it completely.

| | | | | | |
|------------|---------------|--------|-----------|----------|---|
| Title | Title | Hidden | Read-Only | Editable | ⌵ |
| FirstName | First Name | Hidden | Read-Only | Editable | ⌵ |
| LastName | Last Name | Hidden | Read-Only | Editable | ⌵ |
| JobTitle | JobTitle | Hidden | Read-Only | Editable | ⌵ |
| Salutation | Salutation | Hidden | Read-Only | Editable | ⌵ |
| Email1 | Email Address | Hidden | Read-Only | Editable | ⌵ |

Connect Mail shot recipients can then update their contact details as they wish:

Update your details

Update your personal contact details below.

First Name
 Last Name
 Job Title
 Email Address

Contact Preferences Email Fax Phone Letter

New Note

There is also the ability for Contacts to add a **Note** to their contact record as well.

| | | | | | |
|---------|---------|--------|-----------|----------|---|
| NewNote | NewNote | Hidden | Read-Only | Editable | ⌵ |
|---------|---------|--------|-----------|----------|---|

This will automatically create a corresponding Gold-Vision **Note** against the relevant Contact record.

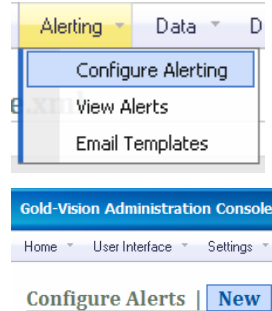
If a Contact has updated their details, then a **Gold-Vision Alert** type is available which is triggered by changes from the Connect source. Alerts may, for example, create a note or an activity or send e-mails. See *Creating Alerts in Gold-Vision* for more details.

➤ Contact Details Update - Gold-Vision Alert

If a Contact has updated their details, (via the Contact update link in a Connect mailshot) then a Gold-Vision Alert type is available which is triggered by changes from the Connect source. Alerts can be, for example, create a Gold-Vision alert or send an e-mail to the Account Manager.

Configuring a Gold-Vision Alert

In the Gold-Vision Administration Console select **Alerting → Configure Alerting → New**



- Select **On-Save Alert**

New Alert

Please select an Alert type:

- When an item is added or edited by a user
- Reminder alert based on a date or state field
- Custom item from the New menu
- Alert on email receipt

- Select **Contact** type

New Alert

Please select an Alert Template:

-
-
-
-
-
-
-
-

- Add Alert text and notes

Configure Alert - Insert Title Here

Alert Type: Contact 'On-Save' - Created by Nikki Bugla on 11/01/2011.

Alert Text: - This is displayed to user when alert fires.

Notes:

Alert Conditions - What causes this alert to `fire`?

These conditions will be evaluated when these items are created or updated: Contact

Alert Actions - What to do when alert conditions are met?

| | |
|--|---|
| <ul style="list-style-type: none"> • Click Add Condition • Select When the update is from a specific source | <div style="border: 1px solid black; padding: 5px;"> <p>Add 'On-Save' Alert Condition</p> <ul style="list-style-type: none"> <input type="checkbox"/> - When a drop-down option is selected <input type="checkbox"/> - When a checkbox is ticked <input type="checkbox"/> - When specific text is entered <input type="checkbox"/> - When any text is entered <input type="checkbox"/> - When a date has passed <input type="checkbox"/> - When a date is due <input type="checkbox"/> - When a numeric range has been reached <input type="checkbox"/> - When a value changes <input type="checkbox"/> - When this item is created <input type="checkbox"/> - When this item is updated <input type="checkbox"/> - When this item is created or updated <input type="checkbox"/> - When this item is integrated <input type="checkbox"/> - When this item is not integrated <input type="checkbox"/> - When the update is from a specific source ← <p style="text-align: right;"><input type="button" value="Close"/></p> </div> |
|--|---|

Configure Alert - Connect Contact Update

Alert Type: Contact 'On-Save' - Created by Nikki Bugla on 05/01/2011. Last updated by Nikki Bugla on 10/01/2011.

Alert Text: Connect Contact Update - This is displayed to user when alert fires.

Notes: Contact

Alert Conditions - What causes this alert to 'fire'?

These conditions will be evaluated when these items are created or updated: Contact

Trigger when update is from a particular source updatesource_datatransferservice ▾

Alert Actions - What to do when alert conditions are met?

Raise an Alert Alert this User... ▾ Nikki Bugla ▾

This alert is de-activated and will not fire.

| | |
|--|---|
| <ul style="list-style-type: none"> • Select updatesource_datatransferservice from the drop down list | <div style="border: 1px solid gray; padding: 5px;"> <p>updatesource_goldvision ▾</p> <ul style="list-style-type: none"> updatesource_goldvision updatesource_goldlink updatesource_importservice <li style="background-color: #e0e0e0;">updatesource_datatransferservice ← </div> |
|--|---|

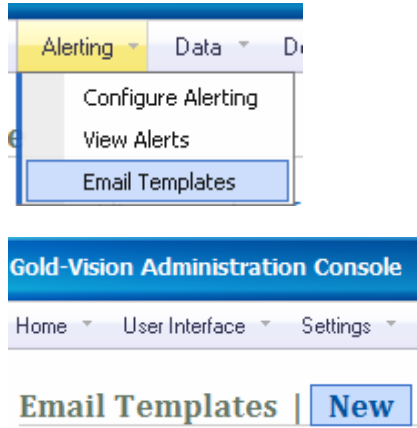
| | |
|---|---|
| <ul style="list-style-type: none"> • Select Add Action →select action from the list e.g. Raise an Alert in Gold-Vision <p>The above example will procude a Gold-Vision Alert when a Connect recipient updates the Update Contact Details form.</p> | <div style="border: 1px solid black; padding: 5px;"> <p>Add Alert Action</p> <ul style="list-style-type: none"> <input type="checkbox"/> - Raise an Alert in Gold-Vision ← <input type="checkbox"/> - Send an Alert via E-mail <input type="checkbox"/> - Modify field values for the Item <input type="checkbox"/> - Modify field values for Items parent <input type="checkbox"/> - Create a new Activity <input type="checkbox"/> - Create a new Opportunity <input type="checkbox"/> - Create a new Project <input type="checkbox"/> - Create a new Note <input type="checkbox"/> - Run a Stored Procedure <input type="checkbox"/> - Run a Program </div> |
|---|---|

| | |
|---|---|
| <ul style="list-style-type: none"> • Select the user from the drop down | <div style="border: 1px solid gray; padding: 5px;"> <p>Alert this User... ▾</p> <ul style="list-style-type: none"> Alert Object Owner Alert Account Manager <li style="background-color: #e0e0e0;">Alert this User... ← Alert this Team... </div> |
|---|---|

| | |
|--|---|
| <ul style="list-style-type: none"> • Save the Alert • Activate the Alert | <div style="border: 2px solid red; padding: 5px; text-align: center;"> <p><input type="button" value="Activate"/> <input type="button" value="Save"/> <input type="button" value="Close"/></p> </div> |
|--|---|

Creating an Email alert

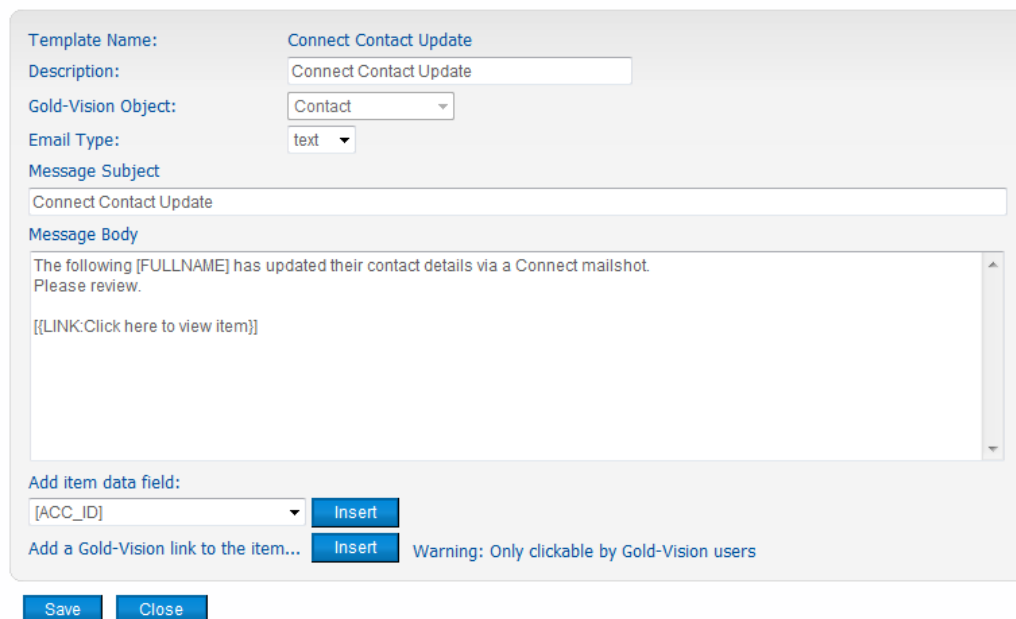
- Alerting → Email Templates → New



Enter the following:

- Enter Description
- Gold-Vision Object – select Contact
- Enter Message Subject
- Type message body, adding fields, select from the list 'Add item data field'
- To add a link to the Contact record in Gold-Vision click the Insert Link
- Click **Save**

Configure Email Template - Connect Contact Update.xml



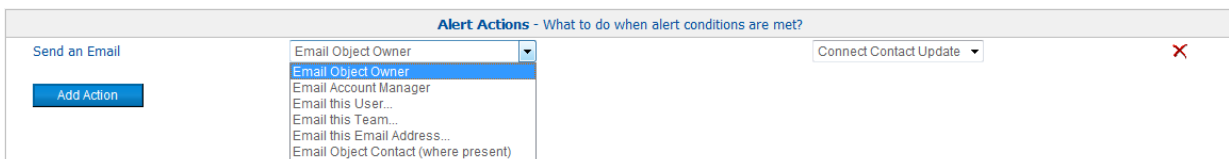
The screenshot shows the 'Configure Email Template' form. Fields include:

- Template Name: Connect Contact Update
- Description: Connect Contact Update
- Gold-Vision Object: Contact
- Email Type: text
- Message Subject: Connect Contact Update
- Message Body: The following [FULLNAME] has updated their contact details via a Connect mailshot. Please review. [[LINK:Click here to view item]]
- Add item data field: [ACC_ID] with an 'Insert' button.
- Add a Gold-Vision link to the item... with an 'Insert' button and a warning: 'Warning: Only clickable by Gold-Vision users'.

 At the bottom are 'Save' and 'Close' buttons.

Follow Configuring a Gold-Vision Alert as above

- Select **Send an Alert via Email** from the Add Action list and select the **Email recipient** and the **Email template**



Save and Activate as above.