amity

User Guide

Version 3.2

Table of Contents

(0) Introduction

Thank you for using *amity*, the easy to use and cost effective software solution that pushes your marketing automation. With its intuitive user interface, amity gives you simple, straightforward ways to manage your daily needs.

This manual will familiarize you with how to start up and how to work with the user interface of this solution. But it is not necessary to read the entire User Guide before you can use amity.

In contrast to other web applications, amity supports the usage of different types of user interactions:

1. **Single-click**: To select an item or to press a button you can perform a single click with the mouse.
2. **Double-click**: Similar to typical desktop applications you can press the computer mouse button twice quickly without moving the mouse to view or edit data.
3. **Right mouse button**: Context menus can be opened by clicking the right mouse button.
4. **Hotkeys**: There are some special keys that can be used to perform special functions: For instance, you can use the ESC key to close a window.
5. **Drag and drop**: Some actions can be performed by dragging and dropping elements. For instance, you are able to assigns contacts to any contact list this way.

amity supports the following browsers:

- Google Chrome
- Internet Explorer
- Firefox
- Safari

We support the latest version of Google Chrome (which automatically updates whenever it detects that a new version of the browser is available). We support the current and previous major releases of Firefox, Internet Explorer, and Safari on a rolling basis. Each time a new version is released, we begin supporting that version and stop supporting the third most recent version.

All browsers must have JavaScript enabled to use amity.
Cookies, Flash or other plugins are not required.

Internet Explorer 9 users:
As previously announced, Internet Explorer 11 launched on October 17, 2013, and as a result, we've discontinued support for Internet Explorer 9.
Organizations that depend on old versions of Internet Explorer may want to consider a dual browser strategy.

We are constantly working on new features and improvements, so we would love to hear from you!

You are the administrator? We recommend you to have a look at the separate *amity Admin Manual*.

(1) Login

You will need to login using your e-mail address and password.

If you are having trouble logging in or don't have a valid e-mail address on file with us, you may need to contact your administrator or our support team.

1. Open the login page (URL will be delivered via email).

2. Put in user name and password into the two fields! The user name is your email address.

3. Submit your inputs by clicking the button labeled *Starten*.

After successful login and equipped with the relevant user rights you will be redirected to the amity *Dash Board*: It provide at-a-glance views of KPIs (key performance indicators) and also shortcuts to the latest creations and campaigns.

(2) First Steps

The graphical user interface of amity can be divided into four sections, as the following figure shows:
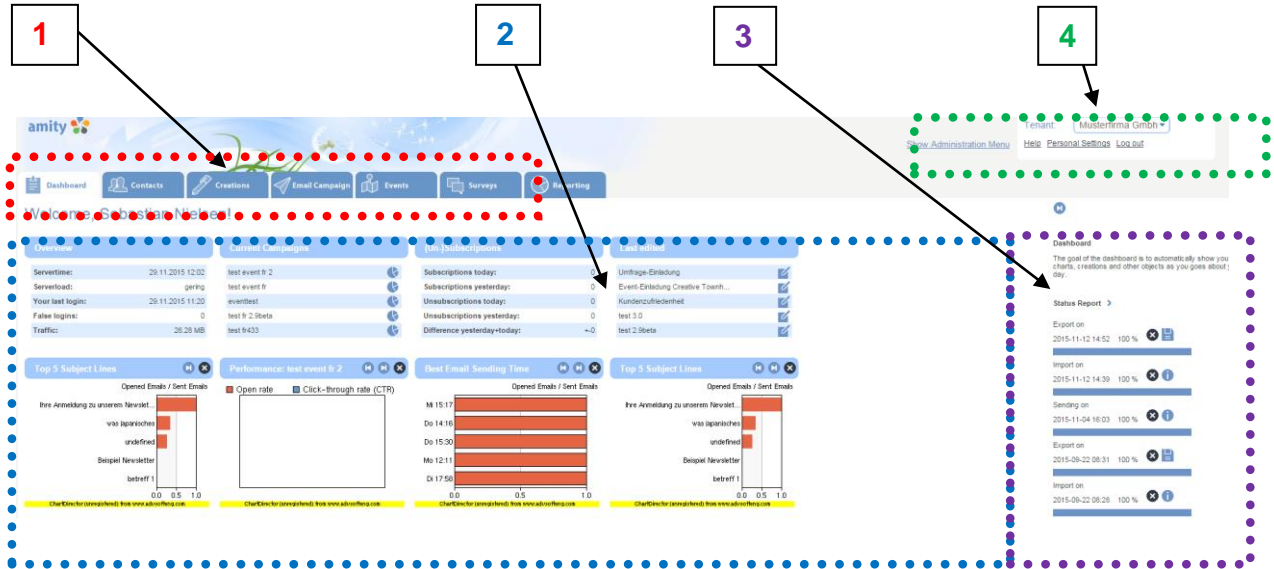
Section 1: Main Menu

You can navigate between different menu items by using the tabs at the top:

- Dash Board
- Contacts
- Creations
- Email Campaigns
- Events
- Surveys
- Reporting

In the case you enabled the Administration Menu (→ Area 4) there will appear different menu items. For a better understanding regarding these, please have a look in the Admin Manual.

Please use the left mouse button to choose a menu item.

Some menu items and functionality are tied to your user permissions, and if you don't have those permissions you will not be able to access that menu item or functionality. Contact your administrator to request needed permissions.

Section 2: Main Section

The main section contains the items related to the selected main menu item ($\rightarrow$ Section 1).

Section 3: LiveView

The LiveView contains:

- A short description of the selected main menu item.
- The status of the latest email campaigns (incl. progress bar)
- The status of the latest contact import processes (incl. progress bar)
- The status of the latest contact export processes (incl. progress bar)

Section 4: Meta Menu

	Tenant:	Musterfirma Gmbh ▾
Show Administration Menu	Help Personal Settings Log out	
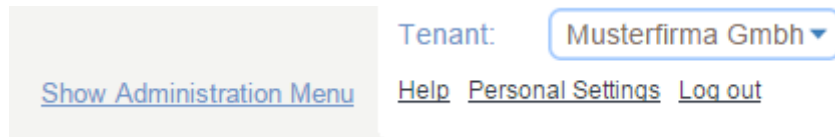
The Meta Menu contains these features:

- **Show Administration Menu**: Use this item to toggle between Main Menu and Administration Menu (→ Section 1). The Administration Menu contains menu items for admins only. If you don't have sufficient permissions, that feature will be disabled.

- **Tenant**: Use this drop-down list to choose another tenant account. If you don't have sufficient permissions, that feature will be disabled.

- **Help:** Click here to access the support website.

- **Personal Settings**: Click here to edit your own email address, name or language.

- **Log out**: Click here to exit amity.

(3) Dash Board

The amity *Dash Board* provides at-a-glance views of KPIs (key performance indicators) and also shortcuts to the latest template creations and campaigns. All this information is placed within four boxes and up to six charts as well. These charts can be added, deleted and sorted individually.

To open the Dash Board you have to click the related menu item of the Main Menu.
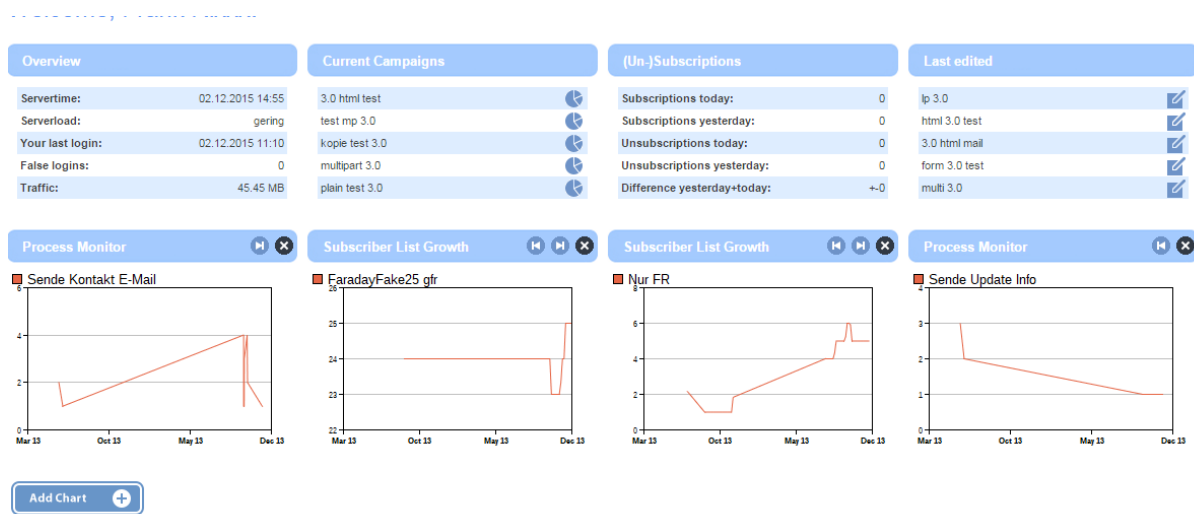
Overview

The Overview box contains information relating the last login, the server time and server traffic.

Current Campaigns

The five latest email campaigns are listed in this box. Click one item to open a detailed *Mailing Report*.

(Un-)Subscribings

This box contains the sum of newsletter subscriptions and un-subscriptions of the last hours. These numbers are based on defined and executed (un-)subscriptions processes.

Last Modified

The five latest creation are listed in this box. Click one item to open the related creation within the *Creation Designer*.

Charts

Click the button [Add Chart ⊕] to add a report chart to your dashboard. You can select between these chart types:

- Top 5 Subject Lines (horizontal bar chart): The subject lines of campaigns with the highest open rate.
- Best Email Sending Time (horizontal bar chart): The sending time of campaigns with the highest open rate.
- Process Monitor (line chart): Visualizes the process executions in a timeline graph. A typical process is the unsubscribing from an email newsletter.
- Latest email campaign performance (line chart): Visualizes the open rate and CTR in a timeline graph.
- Subscriber List Growth (line chart): Visualizes the subscriber list size in a timeline graph.

To remove or replace a chart please click these icons in the tile bar of the chart:
Double-click a chart to select another chart type.

(4) Contacts

1. Overview

amity provides you with all the tools you need to manage your contacts. To use these tools you just have to select *Contacts* from the main menu.
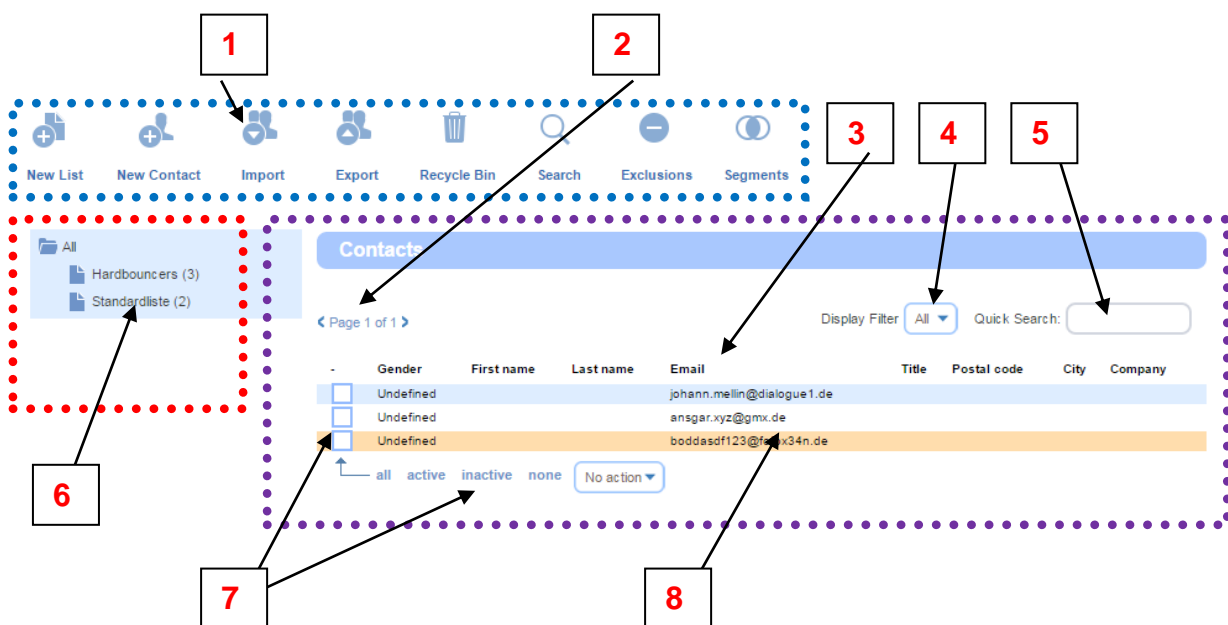

ID	Label / Name	Description
1	Tool Bar	Click the respective icons to proceed to the desired step. (Please see chapter 4.6.)
2	Page	Click on the back or forward arrow icon to move between pages.
3	Column Headers	Sort records in the table by clicking on the column heading. To switch between descending and ascending sort order in the columns, click the heading again. Use the right mouse button to customize your table: Fields, field positions and default sort order.
4	Display Filter	Note that if you have a large number of contacts, it may be helpful to use the filter options, located above the column headings.
5	Quick Search	Use this instant search to find contacts containing text that you specify. Therefore enter at least three characters of the contact name or email address.

		Filter settings will remain in effect until you click this icon: ⊗
6	Contact Lists	Lists are groups you can create to help organize your personal contacts, or to use as mailing lists. You can define as much lists as you want. A single contact can be assigned to multiple lists.
		You select a single list by clicking it. It will be highlighted. On the right hand only contacts will be visible that are assigned to the selected list.
		The lists can be hierarchically organized into folders. To manage folders please see chapter 4.10.
		A context menu can be displayed by clicking the right mouse button while hovering the list tree.
7	Multiple Selection	To move multiple contacts to the recycle bin or exclusion list you can make a multiple selection using the checkboxes on the left hand side. After marking these just choose the action from the drop-down list.
8	Contacts	Each row represents a single contact. A contact contains at least one contact field (e.g. email address). Some of these contact fields are displayed in table columns.
		To select a single contact use the left mouse button to click the table row. The selected contact will be highlighted.
		To modify a contact, double-click the table row. A popup window will open.
		A context menu can be displayed by clicking the right mouse button while hovering the mouse over any table row.

2. New List

Click this icon to create a new list:

Alternately, you can use the context menu to add a list. The context menu can be displayed by clicking the right mouse button while hovering the mouse over the list tree.

Label / Name	Description
Label	Unique name of the list
Filter	List filters use the criteria that you specify to determine how to handle contacts during the import process. Only contacts that matches your criteria will be added or updated. Click this icon to modify your list filters.
Test list	Mark this checkbox when the list is for testing purposes, only.
Locked for sending	Mark this checkbox when the list locked for email campaigns.
Save	Click on this button to create a new list and to close the popup window.
Cancel	Click on this button to cancel this process and to close the popup window.

3. Edit List

To edit an existing list,

1) Hover the mouse over the specific list tree item. Each list is indicated through this icon: 📄 (Test lists are indicated through this icon: 📄)

2) Use the right mouse button to open the context menu and select this item 🖊 *Edit list* (Or double-click the list label with the left mouse button.)

This popup window opens:

Label / Name	Description
List ID	Unique ID of the list
Label	Unique name of the list
Filter	List filters use the criteria that you specify to determine how to handle contacts during the import process. Only contacts that matches your criteria will be added or updated. Click this icon 🖊 to modify your list filters.
Number of contacts	Number of contacts that are assigned to the list.
Test list	Mark this checkbox when the list is for testing purposes, only.
Locked for sending	Mark this checkbox when the list locked for email campaigns.
Save	Click on this button to create a new list and to close the popup window.
Cancel	Click on this button to cancel this process and to close the popup window.

4. Delete List

To delete a single list,

1) Hover the mouse over the specific item of the list tree. Each list is indicated through this icon:
(Test lists are indicated through this icon:)

2) Use the right mouse button to open the context menu and select this item *Delete list*

3) To proceed reenter the 3-digit security code into the input field and press the button labeled *Ok*.

5. Empty List

To empty a single list,

1) hover the mouse over the specific item of the list tree. Each list is indicated through this icon:
(Test lists are indicated through this icon:)

4) Use the right mouse button to open the context menu and select this item *Empty list*

5) In the popup window decide whether you want to delete the contacts or to keep them.

6) To proceed reenter the 3-digit security code into the input field and press the button labeled *Ok*.

6. Move List to another Folder

To move a single list to another folder,

1) hover the mouse over the specific item of the list tree. Each list is indicated through this icon:
(Test lists are indicated through this icon:)

2) Press, and hold down, the button on the mouse, to "grab" the list.

3) "Drag" the object to the desired folder. A yellow border will appear when hovering over this icon:

4) "Drop" the list by releasing the button.

Alternately, you can move and remove a contact into/from any lists by modifying a single contact (please see chapter 4.6.), or by importing contact data (Please see chapter 4.15).

7. New List Filter

List filters ensures that only those contacts will be added to a list, which match with your filter conditions, e.g. „Salutation = Female".

To add a new filter,

1) click this icon to open the *Filter* popup window:

2) Click this icon to add a filter condition.

This popup window opens:

Label / Name	Description
1st drop-down list	Choose a contact field / operand.
2nd drop-down list	Choose an operator (is, is not, greater than, less than, contains, contains not).
3rd drop-down list or text field	Choose the second operand.
OK	Click this button to add the filter condition.
Cancel	Click on this button to cancel this process and to close the popup window.

You can add as many filter conditions as you want.

Two conditions are always AND combined by finding observations that satisfy both conditions.

8. Modify List Filter

To modify an existing list filter,

1) click this icon to open the *Filter* popup window:

2) Click this icon to modify a filter condition .

3) This popup window opens:

Edit filter

Contact ID ▼   is ▼   34

OK ✓   Cancel ✗

Label / Name	Description
1st drop-down list	Choose a contact field / operand.
2nd drop-down list	Choose an operator (is, is not, greater than, less than, contains, contains not).
3rd drop-down list or text field	Choose the second operand.
OK	Click this button to update the filter condition.
Cancel	Click on this button to cancel this process and to close the popup window.

9. Delete List Filter

To delete a list filter,

1) click this icon to open the Filter popup window:

2) Click this icon to delete a single filter condition .

3) Click Save to update the list filter.

10. New Folder

The lists can be hierarchically organized into folders. To add a new list folder,

1) Open the context menu by clicking the right mouse button while hovering the mouse over the list tree (above the root folder or another already existing folder).

2) Click the option 🗂 *Add new folder*

3) In the popup window enter a unique label and click the *Save* button.

11. Delete List Folder

To delete a list folder,

1) select it,

2) open the context menu by clicking the right mouse button and

3) click the option ❌ *Delete folder*

Please notice: Contacts will be retained after this action.

12. New Contact

Click this icon to add a new contact: 👤

Alternately, you can use the context menu to add a contact. The context menu can be displayed by clicking the right mouse button while hovering the mouse over any table row.

This popup window opens:

New Contact

Contact Data | Lists | Process history

Gender: ○ Mr ○ Mrs ○ unknown

Status: Active ▼

Language: Deutsch ▼

Tracking level: Normal ▼

Title:

First name:

Last name:

Email (*):

Birthday:

nurdatum:

datumzeit: .. | 00 ▼ | 00 ▼

GmbH:

> This is just an example. It´s possible that your popup windows contains different contact fields.

Save ✓   Cancel ✗

Label / Name	Description
1st tab	Here you can enter your contact details. Every contact requires a unique email address. All required input fields / selections are marked with an asteriks (*).
2nd tab	Click this tab to add contacts to a list.
3rd tab	Click this tab to open the process history view.
Save	Click this button to add the contact.
Cancel	Click on this button to cancel this process and to close the popup window.

> Every contact requires a unique and valid email address.

13. Edit a Contact

To edit a single contact, just double-click it.

Alternately, you can use the context menu to edit a contact. The context menu can be displayed by clicking the right mouse button while hovering the mouse over the specific table row. Select this option:

Edit

This popup window opens:

Modify Contact

Contact Data | Lists | Process history

Gender	◯ Mr ◉ Mrs ◯ unknown
Status	Inactive ▼
Language	Deutsch ▼
Tracking level	Normal ▼
Title	
First name	Tanja
Last name	Smith
Email (*)	test@dialogue1
Registration date	17.02.2015 15:58
Birthday	
nurdatum	
datumzeit	24.03.2015 00 ▼ 00 ▼
GmbH	

This is just an example. It´s possible that your popup windows contains different contact fields.

Save ✓   Cancel ✗

Label / Name	Description
1st tab	Here you can edit your contact details.

	Every contact requires a unique email address. All required input fields / selections are marked with an asteriks (*).
2nd tab	Click this tab to add or remove contacts to/from a list.
3rd tab	Click this tab to open the process history view.
Save	Click this button to update the contact.
Cancel	Click on this button to cancel this process and to close the popup window.

Every contact requires a unique and valid email address.

14. Moving Contacts to the Recycle Bin

The recycle bin lets you view and restore recently deleted contacts before they are permanently deleted.

To move a single contact to the recycle bin,

1) select it by clicking the left mouse button,

2) open the context menu by clicking the right mouse button and

3) Select the option ⊗ *Move to recycle bin*

To move multiple contacts to the recycle bin you can make a selection using the checkboxes on the left hand side.

After marking them just choose this action from the drop-down list box: *Move to recycle bin*

15. Import Contacts

Step 1

Click this icon to import contacts from a CSV file:

This popup window opens:

Label / Name	Description
CSV file	To upload a CSV file, click *Browse* and choose the file from your computer. It´s possible to upload compressed filed, too. The import provides full support for: zip, rar, 7z , 7zip, gz, tar.gz and bz archives.
Delimiter	In a comma-separated values (CSV) file the data items are separated using commas, semicolons or tabs as a delimiter. Column headers should be included as the first line, and each subsequent line is a row of data. The lines are separated by newlines.
Tracking level	*Normal*: Use this option to anonymize the tracking of clicks and opens (default). *Extended*: Use this option to track at an individual level, whether a contacts has opened or clicked.
Import mode	You can choose between three import modes: *Import new contacts, only*: This mode allows you to only import new contacts. If your import file contains contacts already in amity, they will be ignored to avoid duplication. *Add new contacts, update existing contacts*: This mode lets you do both – import new contacts and update information (such as name or custom fields) for those contacts already in amity. Updated contacts will not remove from any list. *Update existing contacts only*: This mode allows you to **only** update the information (such as name or custom fields) for those contacts already in amity. Updated contacts will not remove from any list.
Encoding	Use the drop-down list to choose the encoding of the CSV file. The import provides

	full support for: UTF-8 and ISO-8859-1
Move to lisis	Check all lists the contact should be moved to.
Upload	Click *Upload* to upload the file and to proceed with step 2.

Step 2

Here you can map contacts fields (left-hand side) to respective CSV fields = column headers. This is easily achieved via the drop-down list boxes on the right-hand side.

The date format of date fields can be chosen using additional drop-down list boxes.

The gender of each contact is based on the first character of the imported field value:

Gender	Characters	Example values
Female	w, f, W, F	*Frau, Weiblich, female*
Herr	H, m, H, M (z.B.	*Herr, Mann, männlich*
unknown	All other characters including whitespace and NULL values	

The status of each contact is based on the first character of the imported field value:

Status	Example values
Active	*Aktiv, aktiv, Active, avtive*
Inactive	*Inaktiv, inaktiv, Inactive, inactive*

All other values including whitespace characters and NULL values will set the contact to "active".

Step 3

Finally, just click *Start* to complete the import process.

The progress and status report can be found in the *LiveView* on the right-hand side. Click this icon to open the report:

Every records requires a unique and valid email address.

Otherwise the contact will not be added.

If your record contains an email address already in amity, the

contact will be ignored (or updated) to avoid duplication.

Column headers should be included as the first line, and each subsequent line is a row of data. The

lines are separated by newlines.

How to export Excel data to CSV files in Excel

By default, the Excel workbook will be saved in the format of .xlsx. If you need to export the data of active worksheet to a CSV file, you can use the Save As command with the following steps:

Step 1: Activate the worksheet you want to export or save as a CSV file, and click the Save as button under the File tab in Excel 2010, it shows the Save as dialog box. In Excel 2007, click Office Button and Save As button to open it.

Step 2: Type the Name for the CSV file, and select the folder where it will be saved in.

Step 3: Then in the Save as type area, select CSV (Comma Delimited) from the drop down list. See screenshot:
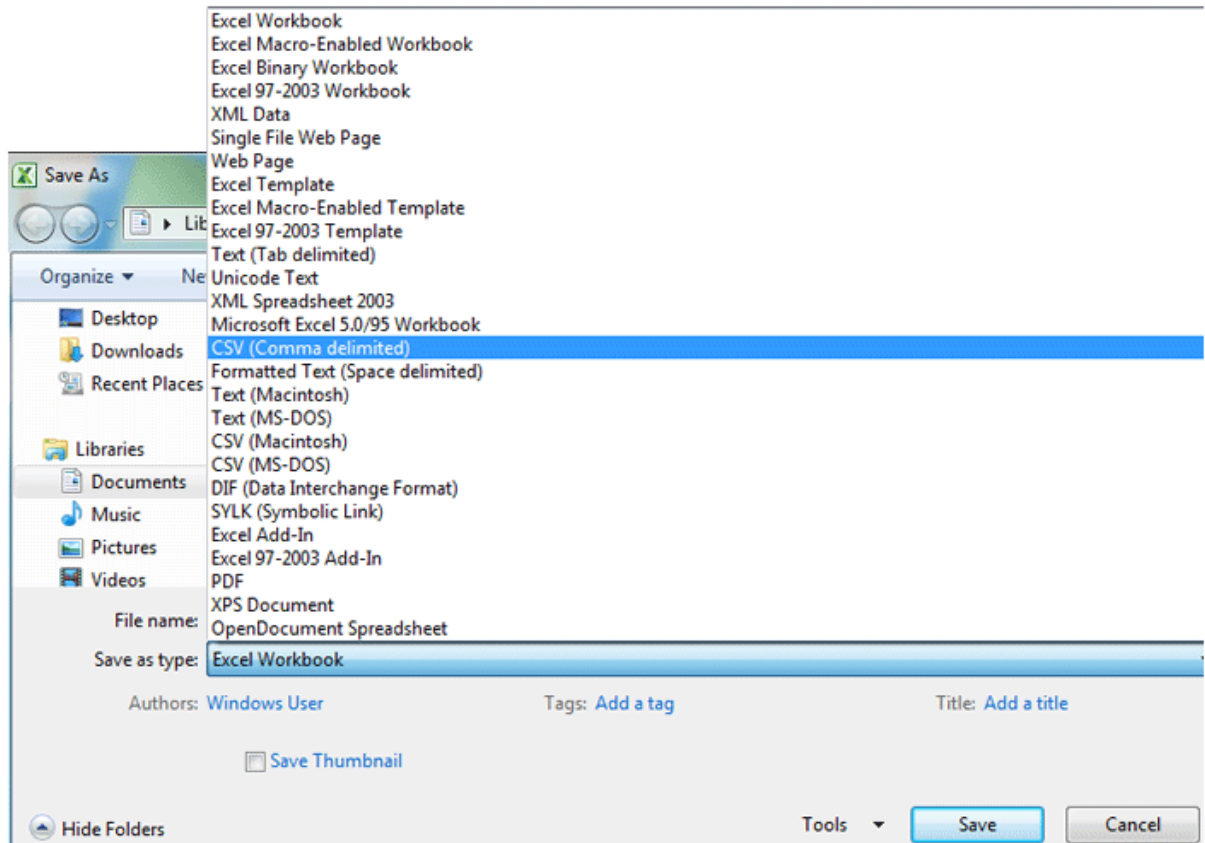
Column headers should be included as the first line.

Quotation marks from a character strings will be removed automatically.
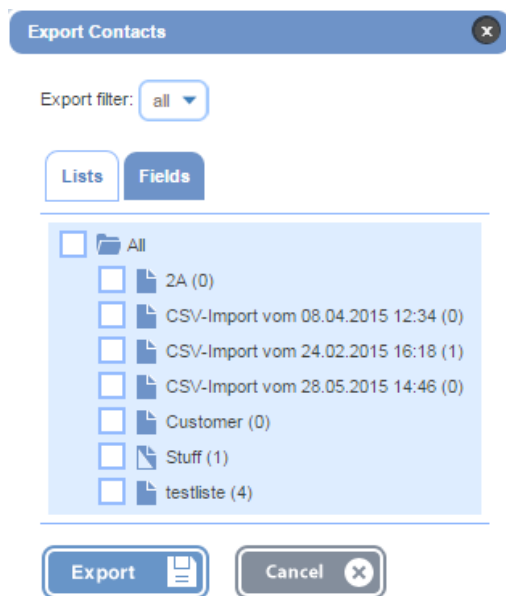
16. Export

Click this icon to export the contacts data into a CSV file:

This popup window opens:

Label / Name	Description
Export filter	Choose whether to export all contacts or only active / inactive contacts.
1st tab	Choose whether to export all contacts or only one or more lists.
2nd tab	Choose the contact fields to export.
Export	Click this button to complete the export process.
Cancel	Click on this button to cancel this process and to close the popup window.

The progress and status report can be found in the *LiveView* on the right-hand side.
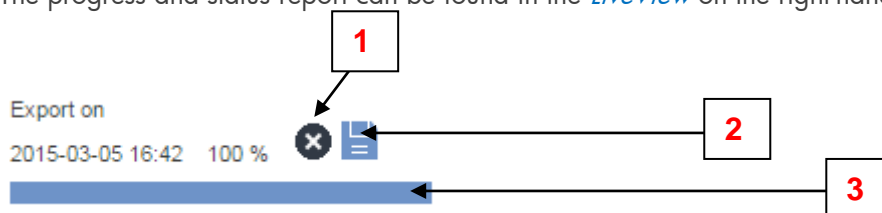
ID	Label / Name	Description
1	Remove	Click this icon to remove the entry from the Live View menu.
2	Save	Click this icon to save the file to your computer.
3	Progress bar	This progress bar tracks the import process

17. Recycle bin

Click the recycle bin icon to view and restore recently deleted contacts:

To restore a single contact to the recycle bin,

1) select it by clicking the left mouse button,

2) open the context menu by clicking the right mouse button and

3) Select the option *Undelete*.

To restore multiple contacts you can make a selection using the checkboxes on the left hand side. After marking these just choose this action from the drop-down list: *Undelete*

18. Search

Perform an advanced search by specifying properties and using Boolean filters. In contrast to instant search, the advanced search results you can turn it into a list to be saved for future use.

Click the search icon to start the advanced search:

This popup window opens:

Label / Name	Description
Fields	Select at least one contact field / operand.
Operator	Select an operator (is, is not, greater than, less than, contains, contains not).
Input fields or date picker	Select the second operand (text, numerical) or date range.
Add to new list	Enter the name of the new contact list.
OK	Click this button to create the new list.
Cancel	Click on this button to cancel this process and to close the popup window.

19. Exclusion List

The exclusion list is very useful advanced functionalities for your campaign creation. It will block all emails aimed at excluded addresses or domains.

Even if these subscribers are present in the recipient lists, the email won't be sent to them.

Click this icon to manage your exclusion list:

This popup window opens:

Label / Name	Description
1st tab („Email")	View all excluded email addresses. Click this icon to delete one single email address from the exclusion list:
2nd tab („Domains")	View all excluded domains. For example: example1.com news.example2.de example3.xy Click this icon to delete one single domain from the exclusion list:
Add	Click this button to add one or multiple email addresses to the exclusion list. Each

	subsequent line is an email address. The lines are separated by newlines. Click *Save* to update your exclusion list.
Export	Click this button save your exclusion list in a CSV file.
Close	Click on this button to close the popup window.

20. Segments

Segments are lists of contacts that meet certain criteria defined by you. They could be simple, such as:

- *All female contacts under the age of 25; or*

- *All contacts living in Paris; or*

- *All contacts that have never opened an email campaign*

Or more complicated, such as:

All female contacts between the ages of 16 and 25, living in Munich, who have been sent at least one email campaign in the last six months, have not opened any email campaigns in the last six months, are not in the contact list "Leads 2014", and have not been sent any of three "re-engagement" campaigns.

Click this icon to manage your contact segments:

This popup window opens:

Segments						
Label	**Created on**	**Modifed on**	**Modified by**	**Last execution**		
Best customers	15.12.2015 16:34	15.12.2015 16:34	Frank Rixxx		✎	✕
Leads 11/2015	15.12.2015 16:34	15.12.2015 16:34	Frank Rixxx		✎	✕

Add ⊕   Close ✕

- Click this icon to modify a segment ✎

- Click this icon to delete a segment ✕ (contacts will not be deleted)

- Click this button to add a new contact segment: *Add*

1 **2** **3** **4** **5** **6** **7** **8**

Edit Segment

Segmentation of Contacts

Label: Best customers

Contacts fields

Sendings

Standard

	fr test zust
	test tets
	test ind2
	test ind
	test fr 2.9.10
	Kina01
	test dpa
	2.9.5 test
	test fr 2.9.5
	test 2.9.5
	test
	test frt
	2.9.4 teil 3
	txt test
	2.9.4
	swyn test
	noch einer
	test fr

Lists

Processes

Gender — is — Male ⊗

and

Tracking level — is — extended ⊗

and

boulivard — is — opened ⊗

and

Drop Here

and

Drop Here

This segment matches with ??? contacts..

Save ✓   Execute ✓   Close ✗

9 **10** **11** **12** **13**

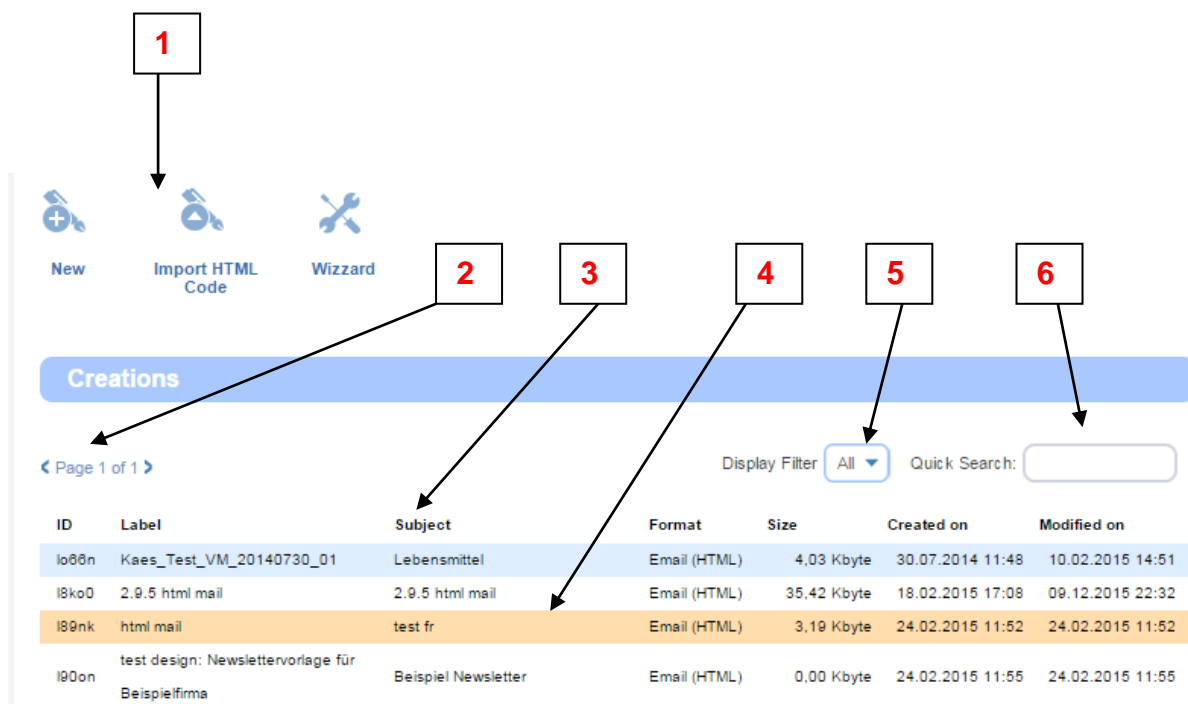| ID	Description
1	Enter the name of the segment (unique)
2	Accordion items to expand
3	Comparison operand; can be placed by drag and drop
4	First comparison operand as part of a criteria statement.
5	Choose a comparison operator from the drop-down list
6	Combining of two criteria statements.
7	Enter or select the second comparison operand as part of a criteria statement.
8	Click here to remove a criteria statement.
9	Click here to update the segment.
10	Click here to turn the segment into a list to be saved for future use.
11	Combining of two criteria groups
12	Click here to add a new conjunction group.
13	Click here to search for matching contacts.

21. Trigger a User Defined Process

If GUI triggering is enabled for a user-defined process, it will appear as a context menu item.

The context menu can be displayed by clicking the right mouse button while hovering the mouse over the specific table row. Click this icon to trigger a specific process:

(5) Creations

1. Overview

amity provides you with all the tools you need to create and manage your emails, landing pages and web forms. To use these tools you just have to select *Creations* from the main menu.

ID	Label / Name	Description
1	Tool Bar	Click the respective icons to proceed to the desired step.
2	Page	Click on the back or forward arrow icon to move between pages.
3	Column Headers	Sort records in the table by clicking on the column heading. To switch between descending and ascending sort order in the columns, click the heading again. Use the right mouse button to customize your table: Fields, field positions and default sort order.
4	Creation	Each row represents a single creation. There are three creation types: Email, landing page, web form To select a single creation use the left mouse button to click the table row. The selected creation will be highlighted.

		To edit a creation, double-click the table row. A popup window will open. A context menu can be displayed by clicking the right mouse button on any table row.
5	Display Filter	Note that if you have a large number of creations, it may be helpful to use the filter options, located above the column headings. Default: Recently updated (last 14 days)
6	Quick Search	Use this instant search to find creations containing text that you specify. Therefore enter at least three characters of the creation name, title or subject. Filter settings will remain in effect until you click this icon: ⊗

2. New Creation

Click this icon to add a new contact:

Alternately, you can use the context menu to add a creation. The context menu can be displayed by clicking the right mouse button while hovering the mouse over any table row.

This popup window opens:

New Creation

| General | Designer | Hyperlinks | Images | Attachments | Delivery Check | Display check |

Name:

Campaign ID:

Language: Deutsch ▾

Type: Email ▾

Format: HTML ▾

Category: Standard ▾

Subject:

Protected: ☐

Save ✓   Close ✗

According to the selected creation type (email, landing page or web form) there will appear different tabs and input / selection fields.

Creation type = *Email*

Label / Name	Description
Name	Unique name of the creation (for internal use)
Campaign ID	Optional: ID of campaign. You can insert personalization tags here, too.
Language	Language of creation
Type	Type of creation (*email*, *landing page* or *web form*)
Format	Email format (*Plain*, *HTML* or *multipart*)
Category	Campaign category (defined by the administrator)
Subject	Subject line of the email; You can insert personalization tags here, too.
Protected	Does protect your creation from being deleted
Save	Click this button to save the email.
Close	Click on this button to close the popup window.

Additional tabs

Label / Name	Description
Designer	The designer enables you to build new creations and to edit your content. (Please see chapter 5.8.x).
Hyperlinks	Manage all included hyperlinks here (please see chapter 5.12.x).
Images	Manage all included images here (please see chapter 5.13.x).
Attachments	Manage your email attachments here (please see chapter 5.14.x).
Inbox Placement Test	Run spam score and inbox placement tests, are ready to deploy and have confidence that your message will reach its audience (please see chapter 5.15.x).
Inbox Previews	Preview your emails in more than 20 popular email clients on desktop and mobile devices all in one place (please see chapter 5.16.x).

General tab (Creation type = *Landing page*)

Label / Name	Description
Name	Unique name of the creation (for internal use)
Campaign ID	Optional: ID of campaign.

	You can insert personalization tags here, too.
Language	Language of creation
Type	Type of creation (*email*, *landing page* or *web form*)
Title	Title of the page; You can insert personalization tags here, too. The title is visible to users and to search engine spiders.
Protected	Does protect your creation from being deleted
Save	Click this button to save the landing page.
Close	Click on this button to close the popup window.

Additional tabs

Label / Name	Description
Designer	The designer enables you to build new creations and to edit your content. (Please see chapter 5.8.x and 5.10.x).
Hyperlinks	(Not in use right now.)
Miscellaneous	This tab allows you to set access permissions and perform search engine optimization.

General tab (Creation type = *Web form*)

Label / Name	Description
Name	Unique name of the creation (for internal use)
Type	Type of creation (*email*, *landing page* or *web form*)
Save	Click this button to save the web form.
Close	Click on this button to close the popup window.

Additional tabs

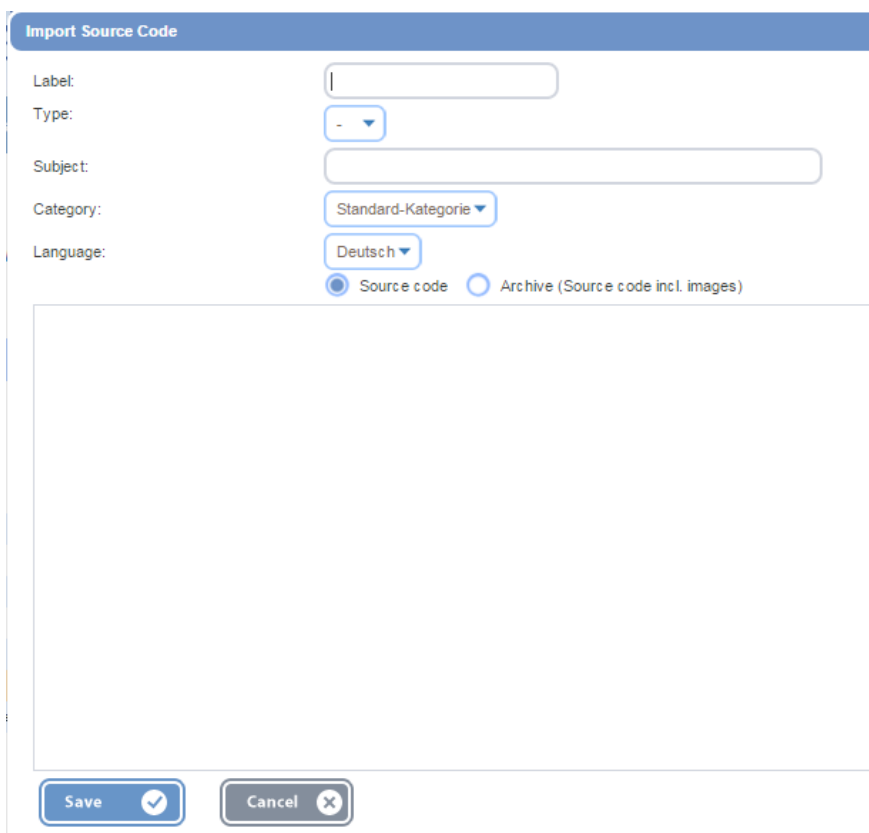| Label / Name	Description
Pages	Define your single pages and the page sequence here (please see chapter 5.8 and 5.11).
Categories	Define your categories for weighting adjustment here. It assigns an adjustment weight to each survey respondent (please see chapter 5.11.6).

3. Upload a custom HTML Template

You can code your own HTML template and import it to your amity account.

This popup window opens:

Import Source Code

Label:	
Type:	- ▼
Subject:	
Category:	Standard-Kategorie ▼
Language:	Deutsch ▼
	● Source code ○ Archive (Source code incl. images)

Save ✓   Cancel ✗

Label / Name	Description
Name	Unique name of the creation (for internal use)
Type	User the drop-down list to choose a creation type: *Email* or *landing page*.
Subject	**Creation type =** *Email:* Subject line of email
Category	**Creation type =** *Email:* Campaign category (defined by the administrator)
Language	Language of creation
Quellcode / Archiv	Select *Paste html from clipboard* to copy and paste your html code. This works fine if you are using absolute paths. Your html file should use UTF-8 character encoding.

	Select *Upload compressed archive (containing html file and images)* to upload a compresses file archive. Follow these steps to create a ZIP file on Windows: Find the file folder (with the .html file and your images in it). Send the entire file folder to a zipped file by right clicking it and selecting Send to ... Compressed (Zipped) File. The upload provides full support for: zip, rar, 7z , 7zip, gz, tar.gz and bz archives. Your html file should use UTF-8 character encoding.
Save	Click this button to start the import.
Close	Click on this button to cancel this process and to close the popup window.

4. Edit Creation

To edit a creation,

1) select it by clicking the left mouse button,

2) open the context menu by clicking the right mouse button and

3) select the option *Edit*

(Or double-click the it with the left mouse button.)

5. Copy Creation

To modify a creation,

1) select it by clicking the left mouse button,

2) open the context menu by clicking the right mouse button and

3) select the option *Copy*

6. Delete Creation

To delete a creation,

1) select it by clicking the left mouse button,

2) open the context menu by clicking the right mouse button and

3) select the option *Delete*

7. Multi Tenant Copy

To copy a creation to multiple tenant accounts,

1) select it by clicking the left mouse button,

2) open the context menu by clicking the right mouse button and

3) select the option   *Multi tenant copy*

For a better understanding regarding these, please have a look in the Admin Manual.

8. Designer

8.1 Introduction

The amity *Designer* allows you to build professional emails, landing pages and web forms without any coding skills.
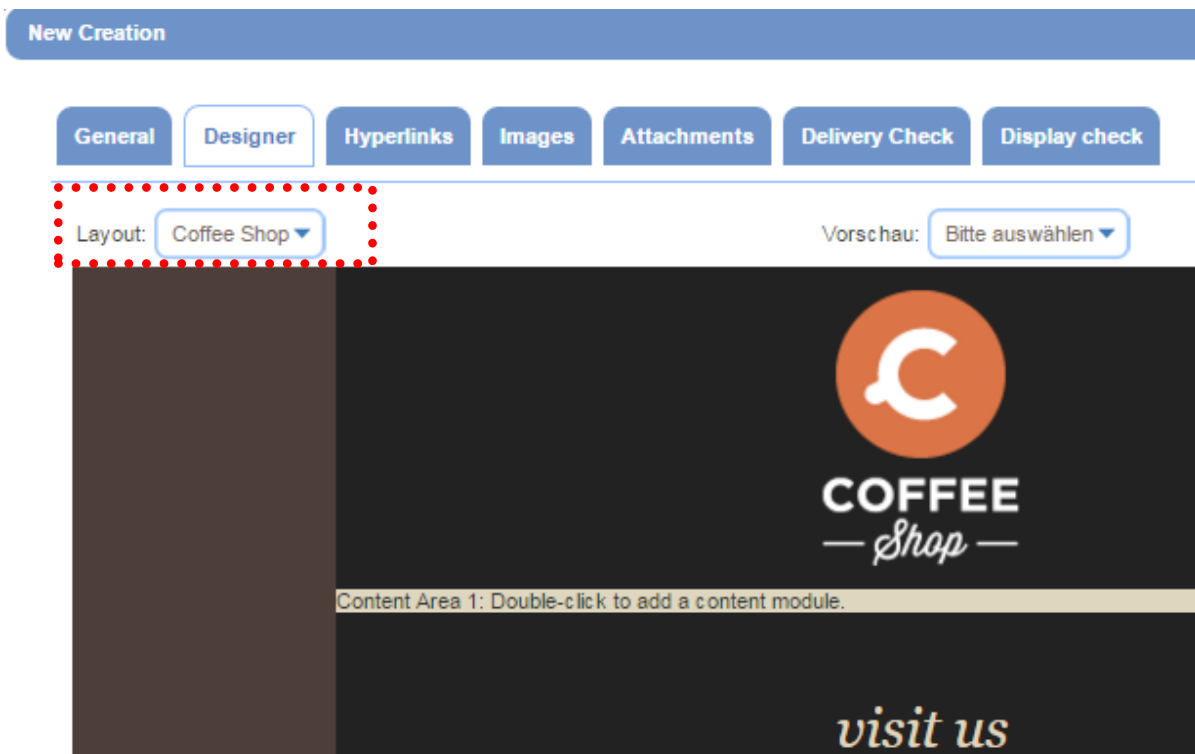
Every creation is based on one single, pre-defined grid (called *Layout*) and one or more content blocks. You can use the setup wizard to create a set of layout and content blocks. Alternately, you can code and import them on your own.

Please notice: The content of creations that have been imported from HTML as a whole cannot be edited as comfortable as creations based on a pre-defined layout and content blocks.

8.2 Layout

The pre-defined *Layout* defines the structure and general design of your creation, e.g. the body width and background color. Also, it contains all the static content, like preheader, logo and disclaimer. Every layout consist of one or more content areas.

Choose one layout from this drop-down list:

8.3 Content Areas

Every layout consist of one or more content areas. A content area is the area on a layout where you can add content blocks for your creation. Content blocks can be stacked one on top of another to build it. Every content area has an ID field that uniquely identifies that area.
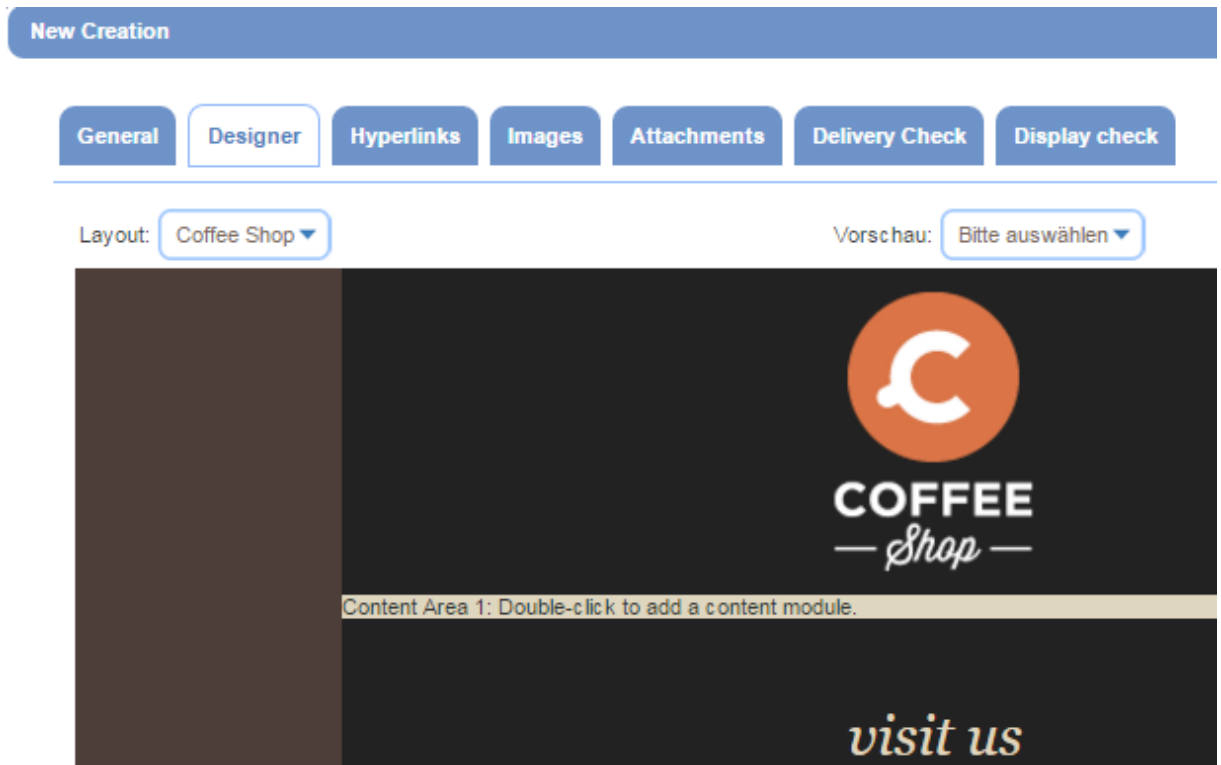
Layout examples consisting one or more content areas:
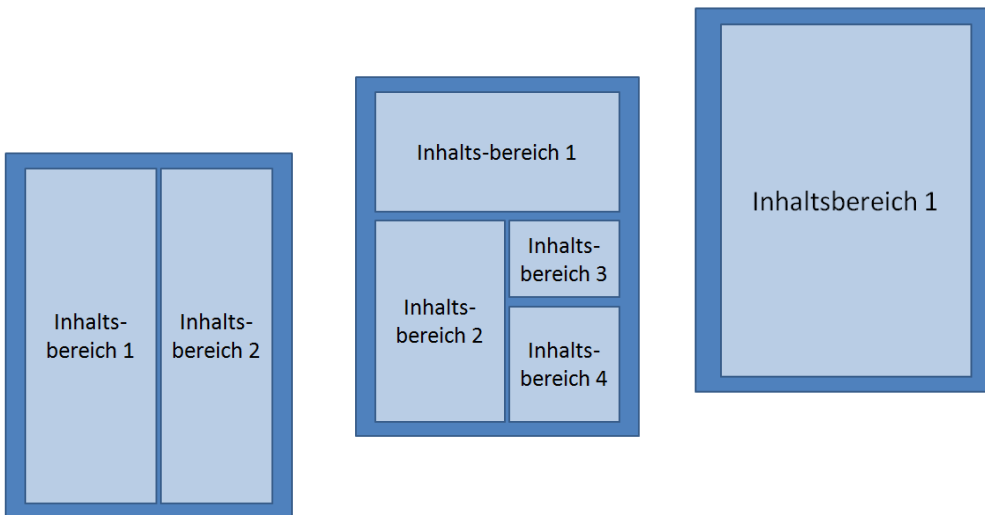
8.4 Add a content block

Double-click the label of the (still empty) content area to add the first content block:

A repeat control for each content area show when selecting a block. Click the *plus* (+) icon to add another content block:

This popup window opens:

Add Module

Template: Standard Artikel ▾

OK ✓   Cancel ✗

Choose a content block template in the drop-down list box and click *OK*!

8.5 Add content to a content block

A content block can hold static content as well as placeholders. Placeholders are the place where you can add your content using the Designer.

To add content,

a) double-click the placeholder or

b) double-click the already inserted content (text, hyperlink, image).

Content Placeholder

Bezeichnung	Beschreibung
Headline N	Short text without any line breaks (N = sequential number)
Text N	Text (N = sequential number)
Hyperlink N	Hyperlink (N = sequential number)
Image N	Image (N = sequential number)
Document N	Linked uploaded document (e.g. PDF) (N = sequential number)

8.6 Insert and replace images

To insert an image, double-click the placeholder.

To replace an image, double-click the already inserted image.
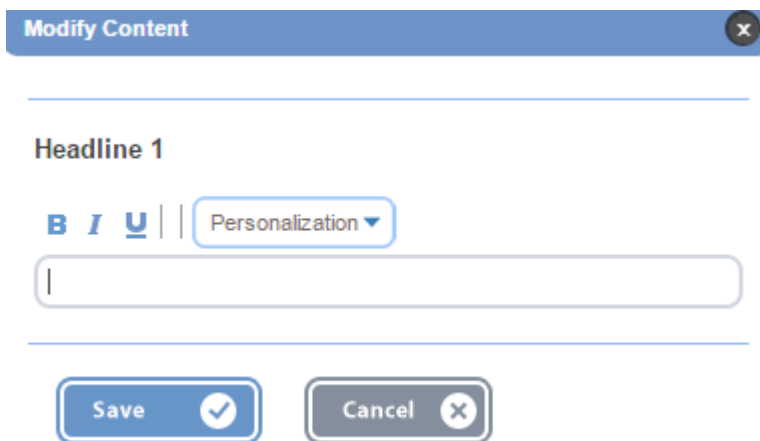
This popup window opens:

To upload an image file, click *Browse* and choose the file from your computer. Alternately you can use an existing image from your media library. Once you select the image, simply click on the *Save* button.

8.7 Insert and edit headlines

To insert a headline, double-click the placeholder.

To edit a headline, double-click it.

This popup window opens:

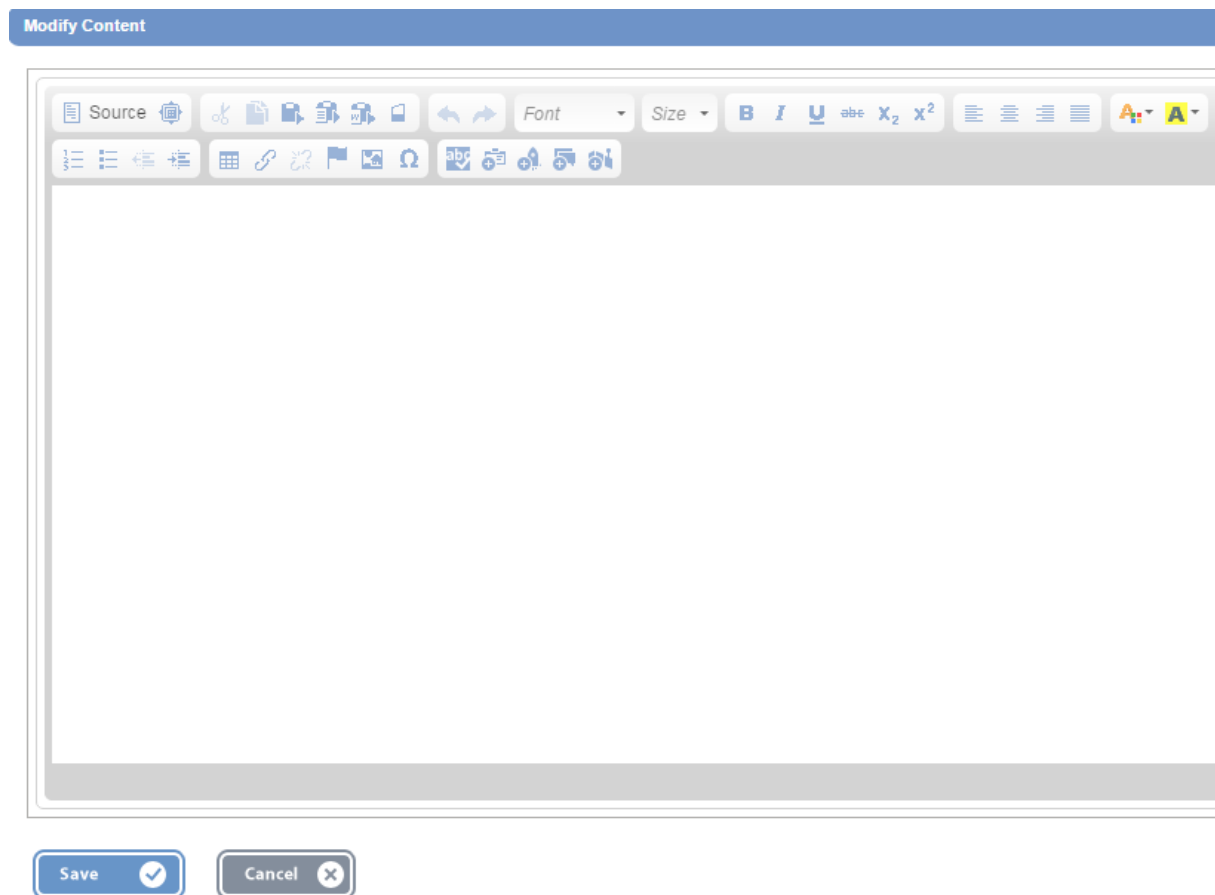Once you edited the text, simply click on the *Save* button.

8.8 Insert and edit text blocks

To insert a text block, double-click the placeholder.

To edit a text block, double-click it.

This popup window opens:

This is a WYSIWYG editor - a user interface that allows the user to view something very similar to the end result while the document is being created. Be careful not to mistake the visual authoring mode of this editor as an indication of what the final output will look like.

Especially pasting text from external applications is a problem. If you want to do so, please use these two functions:

- *Paste from Word*: Some text has lots of unnecessary styles, pictures and links. Use the *paste as plain text* function to get rid of the styling, pictures and links.

- *Paste as plain text*: Many word processing programs and some websites insert extra text styling information. When you attempt to modify this information (using the tools above) unexpected

formatting problems can occur. The *paste from Word* function neatens up the styling information, preventing some formatting problems.

8.9 Insert and edit hyperlink

To insert a hyperlink, double-click the placeholder.

To edit a hyperlink, double-click the linked text or image.

This (or a similar) popup window opens:

Setting a hyperlink is always optional. If you do not enter an URL, the related text or image will be visible as well.

8.10 Select a content block

To identify a single content block, just **perform a single click with the mouse**. A blue, dotted line appears around the content block.

Open the context menu by clicking the right mouse button while hovering the mouse over any content block, and you can see the name of the content block template.

8.11 Change Content Block Template

To change a content block template,

1) select the content block by clicking the left mouse button,

2) open the context menu by clicking the right mouse button and

3) select the option *Change template*
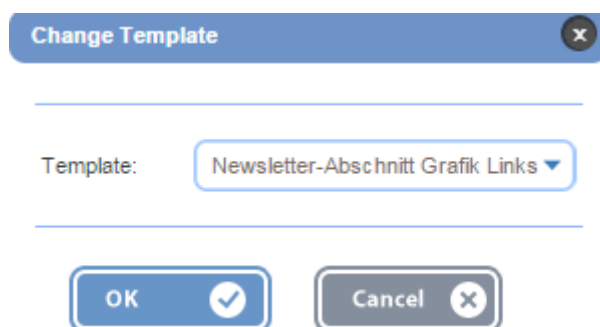
Choose one template from this drop-down list and click *OK*!

8.12 Drag and Drop Content Blocks

Repeatable content blocks can be moved vertically within a content area. When you drag and move a content block, you'll see an arrow showing the new position when releasing the left mouse button.

Alternately, use the right mouse button to open the context menu and select one of these items:

Move up

Move down

Note: A block can only be moved around the page where it was added.

8.13 Delete Content Block

Click this icon to delete a selected content block:

Alternately, use the right mouse button to open the context menu and select this item:

Delete

8.14 Edit filter conditions of content block

The content filter ensures that only those contacts will see the content block, which match with your filter conditions, e.g. „Salutation = Female". Otherwise it will not appear.

Use the right mouse button to open the context menu and select this item:

Edit filter conditions of content block

To add a new filter condition, click this icon:

This popup window opens:

Add new filter

Contact ID ▼ is ▼

OK ✓   Cancel ✗

Label / Name	Description
1st drop-down list	Choose a contact field / operand.
2nd drop-down list	Choose an operator. (is, is not, greater than, less than, contains, contains not).
3rd drop-down list or text field	Choose the second operand.
OK	Click this button to add the filter condition.
Cancel	Click on this button to cancel this process and to close the popup window.

You can add as many filter conditions as you want.

Two conditions are always AND combined by finding observations that satisfy both conditions.

8.15 Edit Filter Conditions of Content Area

The content filter ensures that only those contacts will see the content area, which match with your filter conditions, e.g. „Salutation = Female". Otherwise it will not appear.

Use the right mouse button to open the context menu and select this item:

Edit filter conditions of content area

For details please see previous chapter (5.8.14).

8.16 Automatic table of contents

In case your layout is having a placeholder for a table of contents, you will be able to link any of your content blocks to it. First of all, make sure that you choose a table of contents template in the drop-down list box at the top of the Designer.

Finally, to add a linked headline to the table of contents, just edit the headline (see chapter 5.8.7) and select the checkbox *Add text to the table of contents*.

9. Multipart and Plain Text Emails

A multi-part MIME message is like a package with multiple boxes within it. In your standard HTML + text message, both types of content are sent in the email. The email client will decide which of the boxes to open and display to the recipient.

If your email format is multipart, you will be able to switch between both formats using the designer tabs.

In the plain tab you find a button *Convert from HTML*. Click here to create a text version of your HTML email, automatically. Keep in mind that you´ll still want to manually tweak the resulting text, since headers, links, and texts can appear squished.

10. Landing Page Features

Creating a landing page and creating a HTML email is almost the same. Only two features are not supported: File attachments and embedded images.

Notice that there is an additional tab *Miscellaneous*. It contains some additional settings with regards to:

Search engine optimization: Configuring the meta tag description and keywords is one step in the process of optimizing your landing page for online search engines (SEO).

Access permissions: These permissions grant or deny access to the landing page.

Page preview: You can also easily and instantly preview your personalized landing page by choosing a contact.

11. Web Form Features

There are three main specific features in creating a web form:

1. Forms are spitted across multiple pages. That allows you to create a sequence of forms.
2. Form fields: Some special placeholders enables you to use content blocks like form fields.
3. Categories: Define your categories for weighting adjustment here. It assigns an adjustment weight to each survey respondent.

11.1 Add a Page

To add a new page, just click this icon:

To edit an existing page, click this icon:

To delete an existing page, click this icon:

If you have a sequence of pages, click the move up or move down arrow icon until you have the order you want.

11.2 Form Designer

The amity Designer allows you to build professional web forms without any coding skills.
Every creation is based on one single, pre-defined grid (called Layout) and one or more content blocks.
You can use the setup wizard to create a set of layout and content blocks. Alternately, you can code and import them on your own.

These controls appears at the top of the Designer:

Label / Name	Description
Name	Unique page name
Layout	Choose one layout from this drop-down list.
Next button	Content block containing the "next" button that saves the responses for that page in the report section and proceeds to the next page in the survey.
Previous button	Content block containing the "previous" button that allows the respondent to go back to the previous page to review or edit their response. (optional)

Working with the web form designer is not so very much different from creating an email or landing page.

The one exception that you have not the ability to drag and drop your content blocks.

There are two additional types of form field placeholder you can use:

Label / Name	Description
Input Field	Text field, text area
Input Menu	Checkboxes, radio buttons, drop-down list box

Adding such content blocks within a content area is exactly the same as a regular content blocks (see chapter 5.8.4).
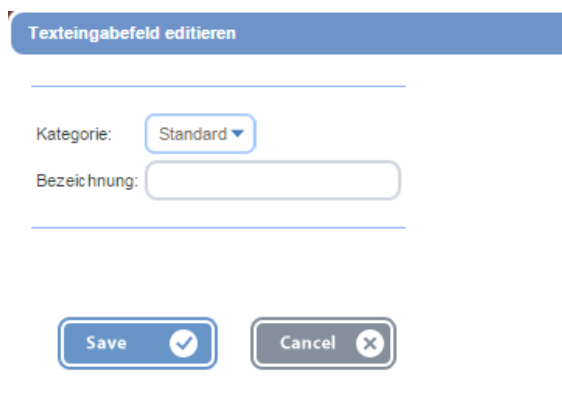
Only creating input menus and fields requires a bit of attention to detail:

11.4 Modify an Input Field or Input Area

An input field or input area is visible after adding to the content block. You don´t need to double-click any text placeholder.

To modify an input field or input area, double-click it.

This popup window opens:

Texteingabefeld editieren

Kategorie: Standard ▾

Bezeichnung:

Save ✓   Cancel ✕

Once you edited the name or chose the correct category, simply click on the *Save* button.

11.5 Modify an Input Menu

An input menu is a more complex construct. It´s allowing the user to make a (single or multiple) choice among predefined alternatives. For this purpose, the input menu displays as a set of radio buttons, checkboxes or a drop-down list box.

To insert an input menu, double-click the placeholder *Input N* that you have in the content block.

To modify an input menu, double-click it.

This popup window opens:

Label / Name	Description
Name	Unique name of the creation (for internal use)
Category	Field category (defined by the administrator)
Type	Field type (Radio button, checkbox, drop-down list)
Scale of measure	There are four levels of measurement you can choose from: nominal, ordinal, interval and ratio. It is an important topic since the type of scale used in taking measurements directly impinges on the statistical techniques which can legitimately be used in the analysis.
Orientation	Orientation of the controls (vertical or horizontal)
Show labels	Explicitly associate all form controls with a label

Click this icon to add alternatives to the input menu: ⊕. Use the text area to enter the labels of the additional alternatives line by line, and click the *Add* button.

```
Dog
Cat
Hamster
```

Add ⊕

Alternately you can click this button to get the same alternatives as the input menu created before: *Copy alternatives from last input menu*

Added alternatives will be presented like this:

ID	Beschriftung	Wert	Vorselektiert	
1	Dog	Dog	☐	✖
2	Cat	Cat	☐	✖
3	Hamster	Hamster	☐	✖

⊕ Optionen hinzufügen

Label / Name	Description
ID	Unique ID of the alternative
Label	Text label of the alternative
Value	Statistical value of the alternative
Pre-selected	Initial state of the input menu (in a drop-down list just one alternative can be pre-selected).

Click this icon to remove an alternative: ✖

11.6 Field Categories

You can assign weighting to individual fields / questions according to the level of importance you determine. Work with field categories to define weighting factors.

1. Click on the *Categories* tab and
2. click this icon
   a. to add a category: ➕
   b. to edit a category: 🖊
   c. to remove a category: ✖

12. Manage Hyperlinks (Emails only)

12.1 Introduction

Click on the *Hyperlinks* tab to perform additional tasks with your creation like

- group multiple hyperlinks,
- test hyperlinks,
- enable click tracking and
- rename hyperlinks.

	Group ID	Tracking	URL		Label
☐	1	✓	https://www.example.com	👁	no description ✏
☐	2	✓	http://www.example.com	👁	no description
☐	3	✓	[Survey.m06n]		Tier-Umfrage
☐	4	✓	[WebDoc.l6ll9]		test webdoc
☐	5	✓	[Browser]		Browser
☐	6	✓	http://www.dialogue1.de	👁	no description

- ▼

12.2 Group Hyperlinks

To sum the tracked clicks of multiple hyperlinks, just group them. To group hyperlinks you can make a multiple selection using the checkboxes on the left hand side. After marking these just choose *Group hyperlinks* from the drop-down list. To ungroup hyperlinks, just choose *Ungroup hyperlinks* from the drop-down list.

12.3 Track Hyperlinks

Click tracking allows you to see which contacts clicked links in your email campaign. When click tracking is enabled for a campaign, amity adds tracking information to each URL.

To enable tracking you can make a multiple selection using the checkboxes on the left hand side. After marking these just choose *Enable tracking* from the drop-down list. To disable click tracking, just choose *Disable tracking* from the drop-down list.

When click tracking is enabled, the hyperlink URL appears with an optional check icon: ✓

12.4 Test Hyperlinks

Select the preview icon of the hyperlink that you wish to test: 👁 This test will open the linked document

in your browser.

12.5 Rename Hyperlinks

In campaign reports your hyperlinks can be identified by their URL, only. But you can rename your hyperlinks to something more memorable.

Otherwise you might get in trouble with to extremely long and cryptic URLs.

Click this icon to rename a hyperlink:

The name of an identical URL from past campaign hyperlinks will be suggested automatically.

13. Manage Images (Emails only)

13.1 Introduction

Click on the *Images* tab to perform additional tasks with your creation like

*   embed images and

*   specify an image ALT text.

13.2 Embed images

Embedding images turns them into a kind of attachment to your email. Recipients working offline or at certain shielded companies will still be able to see the images. All images will be visible instantly in the preview pane of the inbox without the need of performing any extra actions. But certain email clients do not handle embedded images well, which effects your email layout negatively.

To embed images you can make a multiple selection using the checkboxes on the left hand side. After marking these just choose *Embedding* from the drop-down list. To disable embedding, just choose *No embedding* from the drop-down list.

When embedding is enabled, the image ID appears with an optional check icon:

13.3 Preview Image

Click this icon to preview the image:

13.4 Specify an ALT text

The ALT attribute provides alternative information for an image if a user for some reason cannot view it (because of slow connection or a server failure). Click this icon to specify an ALT text: .

14. Manage Attachments (Emails only)

14.1 Introduction

Click on the *Attachment* tab to include a file attachments to your email.

14.2 Attach file

To attach an file, click *Browse* and choose the file from your computer. Click the *Upload* button to include the attachment.

When the file is attached to the email, the attachment ID appears on the left hand side:

14.3 Preview attached file

Select the preview icon of the attachment that you wish to preview: This function will open the file in your browser.

14.4 Remove attached file

Click this icon to remove an attached file:
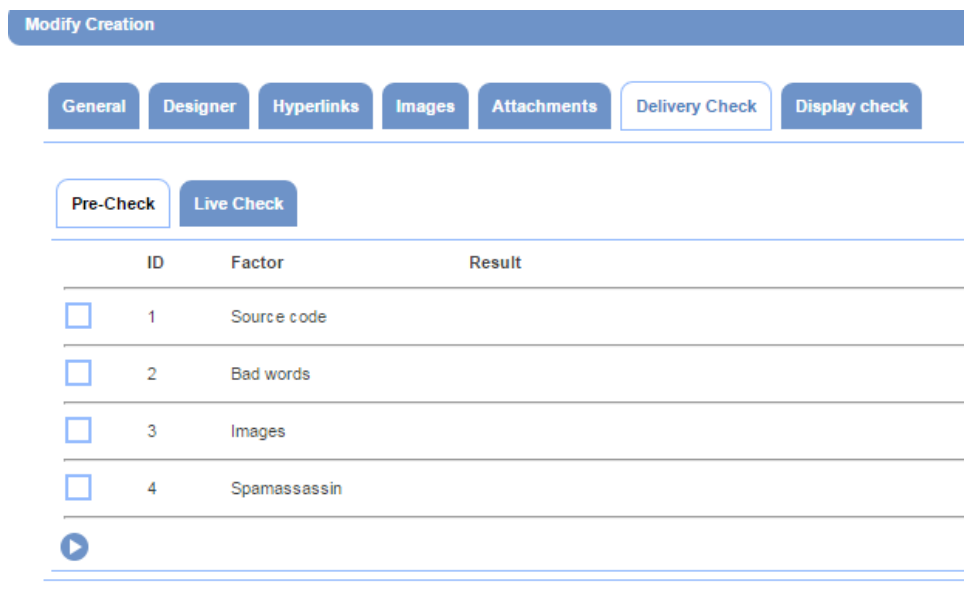
15. Inbox Placement Test (Emails only)

15.1 Introduction

The inbox placement test measures how many messages arrive in your subscribers' inboxes — and not in spam folders or otherwise undelivered by the mailbox provider

15.2 Instant Test

The *Instant Test* enables you to perform a range of inbox placement tests without the need of sending emails.

Just make a selection of one or more factors using the checkboxes on the left hand side. After marking them click this icon to start the *Instant Test*: ▶

Factors

Label / Name	Description
Source code	This syntax validator will analyze your HTML source code. If there is a syntax error, this icon appears: ℹ Clicking the icon will reveal the complete error description.
Bad words	This test will detect possible common spam words and phrases that can set of email service provider spam filters. If there is a match, this icon appears: ℹ Clicking the icon will reveal the complete error description.

Text difference check (Multipart)	This test will compare text differences between HTML and plaintext part of the email because a different content can cause deliverability problems.
Images	This test will detect missing images that can set of email service provider spam filters. If there is a match, this icon appears: Clicking the icon will reveal the complete error description.
Hyperlinks	This test will detect missing hyperlinks that can set of email service provider spam filters. If there is a match, this icon appears: Clicking the icon will reveal the complete error description.
SpamAssassin	This test will perform a complete spam filter test using SpamAssassin. If the resulting score is high enough, this icon appears: Clicking the icon will reveal the complete error description.

15.3 Basic Delivery Test

This test is trying to send out emails to multiple email account we have for delivery testing purposes. At the second step this procedure checks whether emails go to the inbox and not to a spam folder. Additionally you can choose an own test list.

Click this icon to start the test:

16. Inbox Preview (Emails only)

With *Inbox Preview*, you can ensure that your message is the right message by optimizing the design before you send it to your customers. You can instantly preview results across 30 plus desktop, mobile, and webmail clients and get guidance on how to fix email rendering issues.

You can perform up to 20 inbox previews every month.

The *Rapid Test* enables to preview an email over 5 desktop email apps, 10 web based email apps and 4 mobile email apps.

The *Expanded Test* enables to preview an email over 10 desktop email apps, 20 web based email apps and 8 mobile email apps.
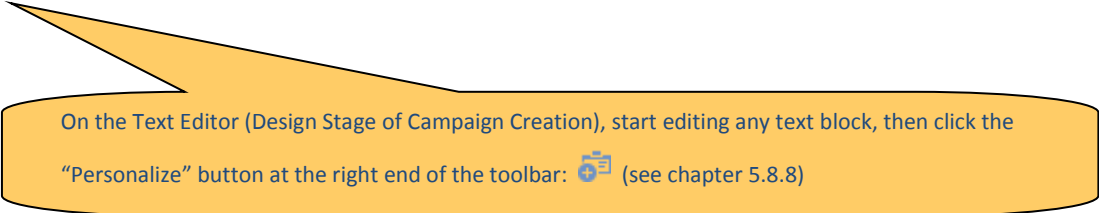
17. Personalization Tags

17.1 Introduction

You can personalize your emails, landing pages and web forms by inserting personalization tags based on contact field data. When your email is sent or a landing page / web form opened in a browser amity dynamically change the tags to display information relevant to each contact.

Personalization tags only work well if you have the corresponding data for contacts.

Example: After sending the campaign, in place of [NAME2] will appear the contacts first name. You can include personalization tags anywhere in your message body and the subject line.

On the Text Editor (Design Stage of Campaign Creation), start editing any text block, then click the "Personalize" button at the right end of the toolbar: (see chapter 5.8.8)

17.2 Tag for conditional salutation

Use the **[Anrede]** tag to place a salutation:

1. *Dear Mrs. *Title* *Last name*,*
2. *Dear Mr. *Title* *Last name*,*
3. *Dear Sir or Madam,*

The third (fallback) condition is met when corresponding data (gender and name) of the contact is missing.

Conditional salutations can be defined by the administrator.

17.3 Basic Tags

Below is a list of all the common personalization tags you can place.

If corresponding data does not exist, then the tag disappears in the output. Fallback terms should be defined in the contact data directly.

Label / Name	Contact Field	Details
[EMAIL]	Email address	
[GENDER]	Gender	Mr. (male) Mrs. (female) X (unknown)
[TITLE]	Academic degree	
[NAME1]	Last name	
[NAME2]	First name	
[COMPANY]	Company	
[BIRTHDAY]	Birthday	DD.MM.YYYY
[FAX]	Fax number	
[PHONE]	Phone number	
[MOBILE]	Mobile phone number	
[ADDRESS1]	Street address	
[ADDRESS2]	Street address part 2.	
[ZIP]	Zip or postal code portion of address.	
[CITY]	City portion of address	
[NATION]	The country for the address.	
[PROVINCE]	The state or province	

	for the address.	
[REGISTERED]	Opt-in date	YYYY-MM-DD hh:mm:ss
[NEXT]	Due date	DD.MM.YYYY
[INTERNALID]	Customer ID	
[PERMISSION]	Tracking level	RESTRAINED (normal) UNRESTRAINED (extended)
[STATE]	Status	A (Aktiv) P (Inaktiv)
[ID_LANGUAGE]	Language	1 (German)

17.4 Custom Field Tags

There are personalization tags for your custom fields, too.

The syntax for these kind of tags are

[N_Label]

N = Tenant ID (encoded)

Label = Field label

Example: *[1_BUDGET2017]*

Multiple select fields (e.g. checkboxes) will produce an output containing all of the

values separated by commas.

If you decide to manually enter a personalization tag into a template please be aware that they are not

case-sensitive.

17.5 Text Formatting Tags

amity includes a number of options to modify the text in personalization tags, in order to change the date format, lowercase letters in to uppercase letters, or vice versa. To modify a personalization tag, simply add the personalization tag as normal, then edit it to include a "|" symbol (also known as the "pipe" symbol), followed by your modification text. The modification options we offer are:
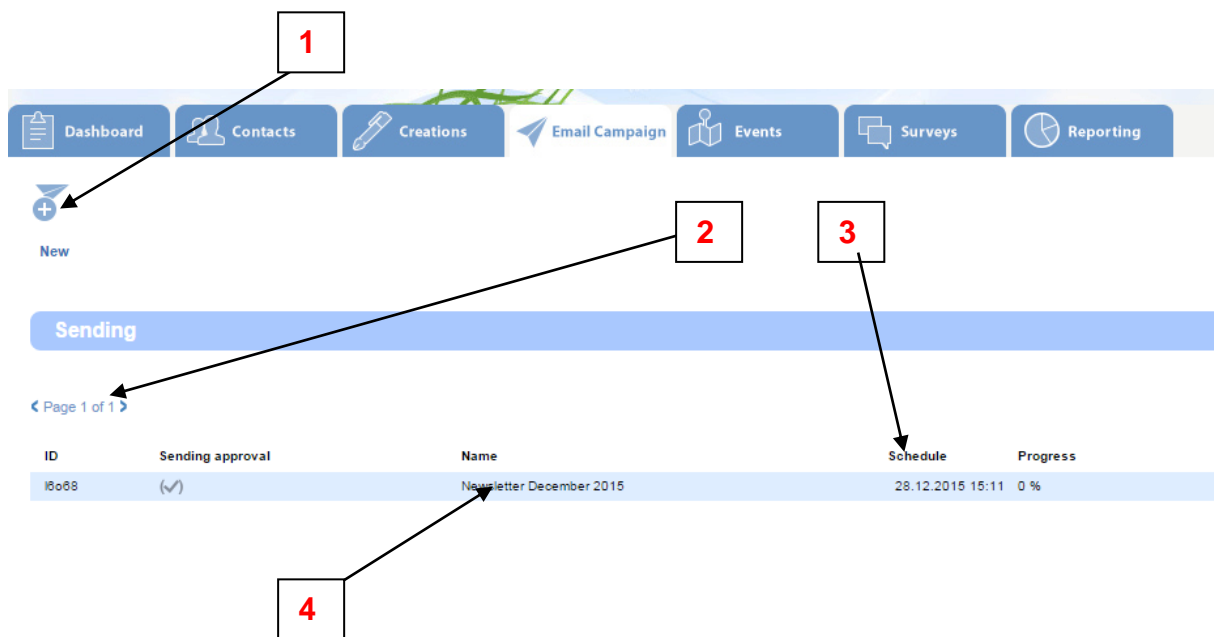
Label / Name	Description	Tag	Sample output
UPPERCASE	All characters will be uppercase.	[CITY|UPPERCASE]	*HAMBURG*
LOWERCASE	All characters will be	[CITY|LOWERCASE]	hamburg

	lowercase.		
1UP	The first character will be uppercase, all others lowercase.	[CITY|1UP]	Hamburg
1LOW	The first character will be lowercase, all others uppercase.	[CITY|1LOW]	hAMBURG
DAYMONTH	Specifies the output format for the date/time: dd.mm	[REGISTERED|DAYMONTH]	31.12
DATE	Specifies the output format for the date/time: dd.mm.JJJJ	[REGISTERED|DATE]	31.12.2011
DATETIME	Specifies the output format for the date/time dd.mm.JJJJ HH:MM	[REGISTERED|DATETIME]	31.12.2011 13:47
DATELONG	Specifies the output format for the date/time: dd. Monat JJJJ	[REGISTERED|DATELONG]	31. Dezember 2011
DATETIMELONG	Specifies the output format for the date/time: dd. Monat JJJJ HH:MM	[REGISTERED|DATETIMELONG]	31. Dezember 2011 13:47

(6) Email Campaigns

1. Overview

amity provides you with all the tools you need to schedule, launch, pause or cancel your email campaigns. To use these tools you just have to select *Email Campaigns* from the main menu.

ID	Label / Name	Description
1	Tool Bar	Click the respective icons to proceed to the desired step.
2	Page	Click on the back or forward arrow icon to move between pages.
3	Column Headers	Sort records in the table by clicking on the column heading. To switch between descending and ascending sort order in the columns, click the heading again. Use the right mouse button to customize your table: Fields, field positions and default sort order.
4	Email campaign	Each row represents a single email campaign. Once a campaign has been sent, the row will disappear. To select a single campaign use the left mouse button to click the table row. The selected creation will be highlighted. To modify a campaign, double-click the table row. A popup window will open. A context menu can be displayed by clicking the right mouse button while hovering the mouse over any table row.

2. New Campaign

Click this icon to add a new campaign:

Alternately, you can use the context menu to add a campaign. The context menu can be displayed by clicking the right mouse button while hovering the mouse over any table row.

This popup window opens:

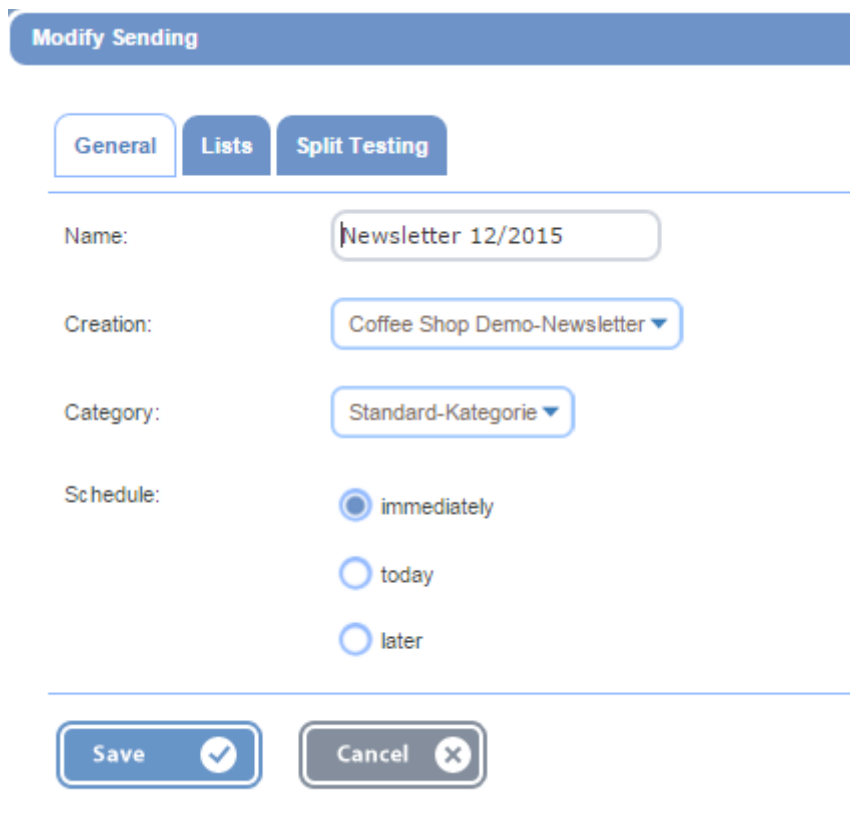| Label / Name	Description
Name	Unique name of the campaign
Creation	Email template
Category	Campaign category
Schedule	Date and time for delivery
Lists	*Lists* tab: Select which list you would like to send the campaign to.
Split Testing	*Split Testing* tab: Please see chapter 6.7.
Save	Click on this button to create a new list and to close the popup window.
Cancel	Click on this button to cancel this process and to close the popup window.

3. Edit Campaign

To edit a campaign,

1)   select it by clicking the left mouse button,

2)   open the context menu by clicking the right mouse button and

3)   select the option ✏ *Edit*

(Or double-click it with the left mouse button.)

This popup window opens:

Label / Name	Description
Name	Unique name of the campaign
Creation	Email template
Category	Campaign category
Schedule	Date and time for delivery
Lists	*Lists* tab: Select which list you would like to send the campaign to.
Split Testing	*Split Testing* tab: Please see chapter 6.7.

Save	Click on this button to update the campaign and to close the popup window.
Cancel	Click on this button to cancel this process and to close the popup window.

Once a campaign has been launched, it can't be edited.

An updated campaign needs to get approved again.

4. Approve Campaign

For security and compliance reasons, each new campaign must be manually approved by a user. No action will be taken on any campaign until approval is received.

Click any check icon to execute the related approval process:

< Page 1 of 1 >

ID	Sending approval
I6o68	(✓)
I868k	(✓)

A popup window containing all the relevant campaign details opens.

This will go over aspects of the email you have successfully set up but also advise you on certain content or settings you may want to revise.

Sending Approval ✕

Are you sure you want to start this sending?

Name:	Newsletter December 2015
Subject:	Coffee Shop Demo-Newsletter
Creation:	Coffee Shop Demo-Newsletter
Format:	HTML
Schedule:	28.12.2015 um 15:11 Uhr
Lists:	fr test
Number of active contacts:	2
Created on/by:	28.12.2015 15:11 (Frank Rixxx)

Approval ✓   Cancel ✕

If everything seems okay, click *Approval*.

Note: An updated campaign needs to get approved again.

5. Delete Email Campaign

To delete a campaign,

1)   select it by clicking the left mouse button,

2)   open the context menu by clicking the right mouse button and

3)   select the option ❌ *Delete*

It´s not possible to delete a campaign already launched. You will have to cancel it first before you are able to delete it.

Note: When you delete a launched email campaign, you also delete the report, along with its report statistics like opens, clicks, and bounces for the campaign.

6. Cancel Email Campaign

You can use this feature to cancel an email campaign after it started and before all of your recipients have received it. To cancel an email campaign, just double-click it and confirm the cancellation.

7. Split Testing

Split testing, also known as A/B testing, is a way of working out which email subject line is the most effective in terms of encouraging opens or clicks.

In a split testing you set up two variations of the email campaign and send them to a small percentage of your total recipients. Half of the test group is sent Version A and the other half gets Version B. The result, measured by the most opens or clicks, determines the winning campaign and that version is sent to the remaining subscribers.

Click the Split Testing tab to create a split test.

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ID	Label / Name	Description
1	Number of variations	Select the number of variations.
2	Subject lines	Enter your subject line variations.
3	Test group size	Choose a test group size from the drop-down list.
4	Test run time	Choose a test run time from the drop-down list. In general, test duration should be long enough that there is a reasonable expectation that an email recipient has had time to interact (open/click through) the email. Test duration will not affect the validity of your A/B test, as long as all emails are sent at the same time, and data collection ends at the specified time.
5	Performance metric	Select either open rate or total unique clicks as the performance metric for your test. You can't change the metric after a test has started.

(7) Events

1. Overview

amity provides you with all the tools you need to launch and manage your events. To use these tools you just have to select *Events* from the main menu.

ID	Label / Name	Description
1	Tool Bar	Click the respective icons to proceed to the desired step.
2	Page	Click on the back or forward arrow icon to move between pages.
3	Column Headers	Sort records in the table by clicking on the column heading. To switch between descending and ascending sort order in the columns, click the heading again. Use the right mouse button to customize your table: Fields, field positions and default sort order.
4	Events	Each row represents an event. To select a single event use the left mouse button to click the table row. The selected event will be highlighted. To modify an event, double-click the table row. A popup window will open. A context menu can be displayed by clicking the right mouse button while hovering the mouse over any table row.

2. New Event

Click this icon to add a new event:

Alternately, you can use the context menu to add a campaign. The context menu can be displayed by clicking the right mouse button while hovering the mouse over any table row.

This popup window opens:

Label / Name	Description
Name	Unique name of the event
Start date	Date and time of event start
Registration ends	Registration deadline (must be before the event start date)
Max attendees	Maximum number of event participants
Web form for registration	Web form creation for event registration
Input field for number of guests	Form input field for number of guests
Landing page	Landing page after an end-user completes the event registration

Error page	Landing page that displays an error message
Error page (max attendees reached)	Landing page that appears when maximum attendees has been reached
Trigger process	Process is triggered after a end-user completes the event registration
Trigger process when event is full	Process is triggered when maximum attendees has been reached
Save	Click on this button to save the event and to close the popup window.
Cancel	Click on this button to cancel this process and to close the popup window.

3. Edit Event

To edit an event,

1)   select it by clicking the left mouse button,

2)   open the context menu by clicking the right mouse button and

3)   select the option *Edit*

(Or double-click it with the left mouse button.)

This popup window opens:

You are not able to choose another web form or input field. Additionally, it´s not possible to decrease the maximum number of event participants or to reschedule the event date or registration end date to an earlier date.

4. Delete Event

To edit an event,

1)   select it by clicking the left mouse button,

2)   open the context menu by clicking the right mouse button and

3)   select the option ✖ *Delete*
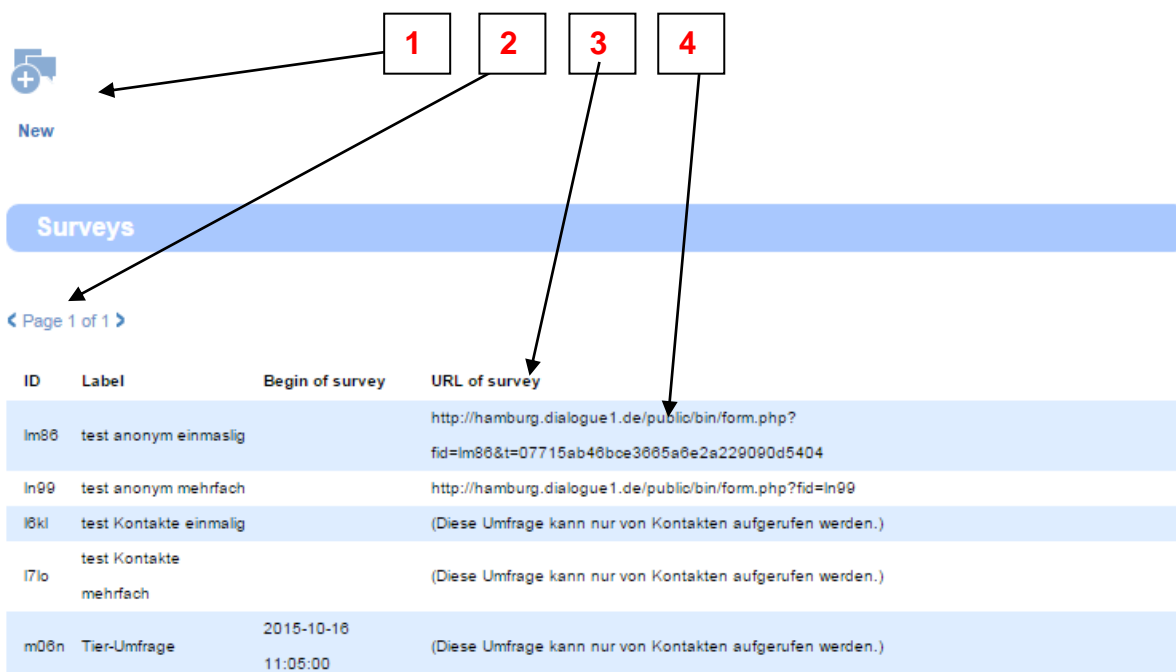
(Or double-click it with the left mouse button.)

Note: All responses will be deleted, too.

(8) Surveys

1. Overview

amity provides you with all the tools you need to launch and manage your online surveys. To use these tools you just have to select *Surveys* from the main menu.

ID	Label / Name	Description
1	Tool Bar	Click the respective icons to proceed to the desired step.
2	Page	Click on the back or forward arrow icon to move between pages.
3	Column Headers	Sort records in the table by clicking on the column heading. To switch between descending and ascending sort order in the columns, click the heading again. Use the right mouse button to customize your table: Fields, field positions and default sort order.
4	Surveys	Each row represents a survey. To select a single survey use the left mouse button to

		click the table row. The selected event will be highlighted.
		To modify a survey, double-click the table row. A popup window will open.
		A context menu can be displayed by clicking the right mouse button while hovering the mouse over any table row.

2. New Survey

Click this icon to add a new survey:

Alternately, you can use the context menu to add a survey. The context menu can be displayed by clicking the right mouse button while hovering the mouse over any table row.

This popup window opens:

Label / Name	Description
Name	Unique name of the survey
Web form	Survey form template (Web form creation)
Access	Use this list box to configure the end-user access to the survey: • Anonymous and unique responses • Anonymous and multiple responses • Identified and unique responses

	• Identified and multiple responses
Start date	Date and time of survey start
Landing page	Landing page after an end-user completes the survey
Trigger process	Process is triggered after an end-user completes the survey
Save	Click on this button to save the survey and to close the popup window.
Cancel	Click on this button to cancel this process and to close the popup window.

3. Edit Survey

To edit a survey,

1)   select it by clicking the left mouse button,

2)   open the context menu by clicking the right mouse button and

3)   select the option ✎ *Edit*

(Or double-click it with the left mouse button.)

Once a survey is activated and survey responses have been collected, it will be "locked" because editing the survey could invalidate responses.

3. Delete Survey

To delete a survey,

1)   select it by clicking the left mouse button,

2)   open the context menu by clicking the right mouse button and

3)   select the option ⊗ *Delete*

Note: All responses will be deleted, too.

(9) Reporting

1. Overview

Measuring the effectiveness of your marketing campaigns is a key element that every online marketer should consider very seriously. It is only by monitoring your marketing activities and constantly analyzing the data that you can make your campaigns more effective and reliable.

The KPI reporting tools allows you view the statistics for your newsletters, landing pages, processes, surveys and events. To use these tools you just have to select *Reporting* from the main menu.
The main window provides at-a-glance views of KPIs (key performance indicators) of all sent email campaigns.
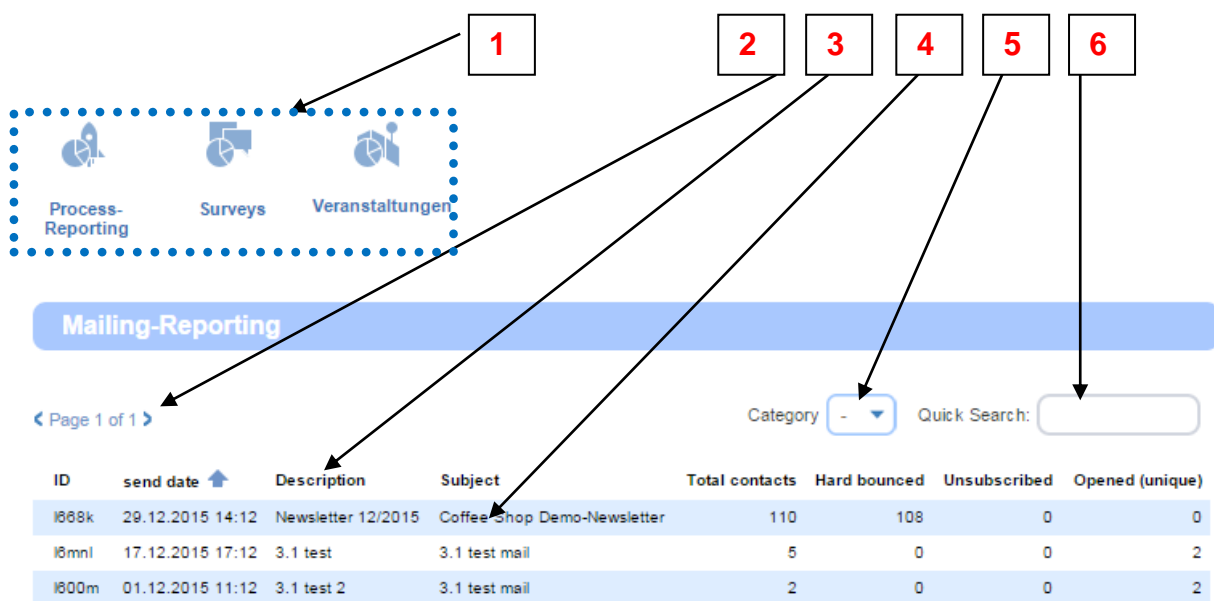
ID	Label / Name	Description
1	Tool Bar	Click the respective icons to view KPI reporting for processes, surveys or events.
2	Page	Click on the back or forward arrow icon to move between pages.
3	Column Headers	Sort records in the table by clicking on the column heading. To switch between descending and ascending sort order in the columns, click the heading again. Use the right mouse button to customize your table: Fields, field positions and default sort order.

4	Email campaign	Each row represents a sent email campaign.
		To select a single email campaign use the left mouse button to click the table row. The selected campaign will be highlighted.
		To view the detail report for an individual campaign, double-click the table row. A popup window will open.
		A context menu can be displayed by clicking the right mouse button while hovering the mouse over any table row.
5	Category	Choose a campaign to refine your search and get more precise and accurate search results.
6	Quick Search	Use this instant search to find contacts containing text that you specify. Therefore enter at least three characters of the contact name or email address.
		Filter settings will remain in effect until you click this icon: ⊗

2. Email Campaign Reporting

To view the detail report for an individual campaign, just double-click it.

Alternately, you can use the context menu to edit a contact. The context menu can be displayed by clicking the right mouse button while hovering the mouse over the specific table row. Select this option:

👁 *Details*

This popup window opens:

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1 **2** **3** **4** **5**

Mailing Report ✕

Campaign: ▼   Category: test ▼   Group by: Lists ▼

Subject: Coffee Shop Demo-Newsletter   Sending duration : 00:00:02

URL for archive: http://hamburg.dialogue1.de/public/bin/newsletter.php?id=l7698   Sending time: 29.12.2015 14:14

Format: HTML   Created by: Frank Rixxx

Period of time: 29.12.2015 14:14 bis 26.01.2016 14:1◀

Charts

■ Sent   1,8%   ■ Delivered   0,0%
■ Excluded   ■ Hardbounce

98,2%   100,0%

■ Opened   ■ Opened
■ Not opened   ■ Click-through rate (CTR)

50,0%   50,0%   50,0%   50,0%

6

7

Key Performance Indicators

Open Rate

8

Click-through Rate (CTR)

Hyperlinks

PDF 📄   Export 💾   Export (Details) 💾   Export (CTR History) 💾   Close ✕

9   **10**   **11**   **12**   **13**

ID	Label / Name	Description
1	Email campaign	Use this drop-down list to choose another email campaign.
2	Campaign category	Use this drop-down list to choose another campaign category.
3	Publish URL	You can use the Publish URL to link the email on your website.
4	Grouped by	Use this drop-down list to view results grouped by: Lists, gender or ISP

5	Date/time range	When you have selected your date/time range, the KPI views will adjust to your selected range. This allows you to easily filter your campaign results.
6	*Charts* item	Expand this accordion item to view the chart section. It provides most of these same metrics, shown as a percentage of the total sent. • Excluded, hard bounces, soft bounces, opened, clicked • Detected email clients • Timeline reporting • Link comparison
7	*Key Performance Indicators* item	Expand this accordion item to view the most important KPIs.
8	More accordeon items	Expand these accordions item to view additional KPIs.
9	PDF	Click this button to download a PDF report.
10	Export	Click this button save your email campaign report in a CSV file.
11	Export (Details)	Click this button save your detailed email campaign report including in a CSV file.
12	Export (CTR History)	Click this button save your email campaign report including a CTR history in a CSV file.
13	Close	Click on this button to close the popup window.

Displayed key performance indicators (KPIs)

ID	KPI	Description
1	Number of contacts	Total number of active contacts in the related contact lists
2	Excluded	
3	Excluded %	Related to #1
4	Invalid	
5	Invalid %	Related to #1
6	Sent	#1 - #2 - #4
7	Sent %	
8	Hard bounces	
9	Hard bounces %	Related to #6
10	Soft bounces	
11	Soft bounces %	Related to #6
12	Autoresponder	

13	Autoresponder %	Related to #6
14	Delivered emails	#6 - #8 - #10
15	Delivery rate %	
16	Opened (or clicked) total	
17	Opened (or clicked) total %	Related to #14
18	Opened (or clicked) unique	
19	Opened (or clicked) unique %	Related to #14
20	Clicked	
21	Clicked (CTR) %	Related to #14
22	CTR based on Sent %	Related to #6
23	Average Recipient Render Rate	#16 divided to #18 The average recipient render rate indicates the number of times a message is opened across its full recipient group.

Unique Clicks: KPI counted only once for each contact that clicks a link in an email or opens an email.

Unique Opens: KPI counted only once for each contacts that opens an email.

Click this icon save a detailed report in a CSV file: 🖫

Click this icon view a detailed report: 👁

Key Performance Indicators							
	GMX	Google	Microsoft	Yahoo	Other	Total	
Number of contacts	112	34	21	4	3212	3383	👁
Excluded	0	0	0	0	0	0	
Excluded %	0,00	0,00	0,00	0,00	0,00	0,00	
Invalid	0	0	0	0	0	0	
Invalid %	0,00	0,00	0,00	0,00	0,00	0,00	
Hard bounces	0	0	0	0	30	30	👁🖫
Hard bounces %	0,00	0,00	0,00	0,00	0,93	0,89	
Soft bounces	0	0	2	0	59	61	👁🖫
Soft bounces %	0,00	0,00	9,52	0,00	1,84	1,80	
Auto response E-Mails	0	0	0	0	0	0	
Auto response E-Mails %	0,00	0,00	0,00	0,00	0,00	0,00	
Probably delivered	112	34	19	4	3123	3292	
Unsubscriptions	0	0	0	0	4	4	👁
Unsubscriptions in %	0,00	0,00	0,00	0,00	0,12	0,12	
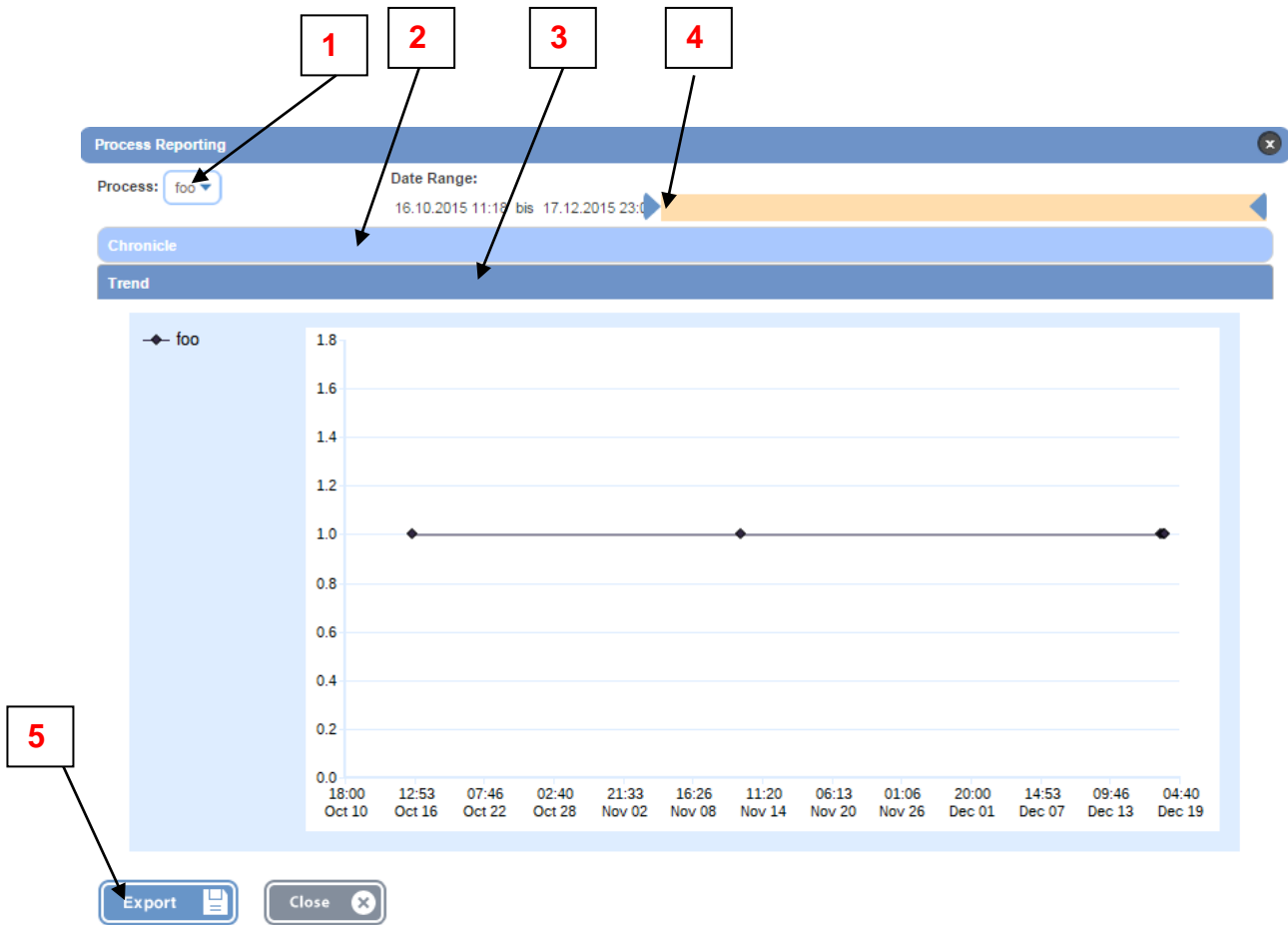
3. Process Reporting

Click this icon to view the process reporting:

This popup window opens:

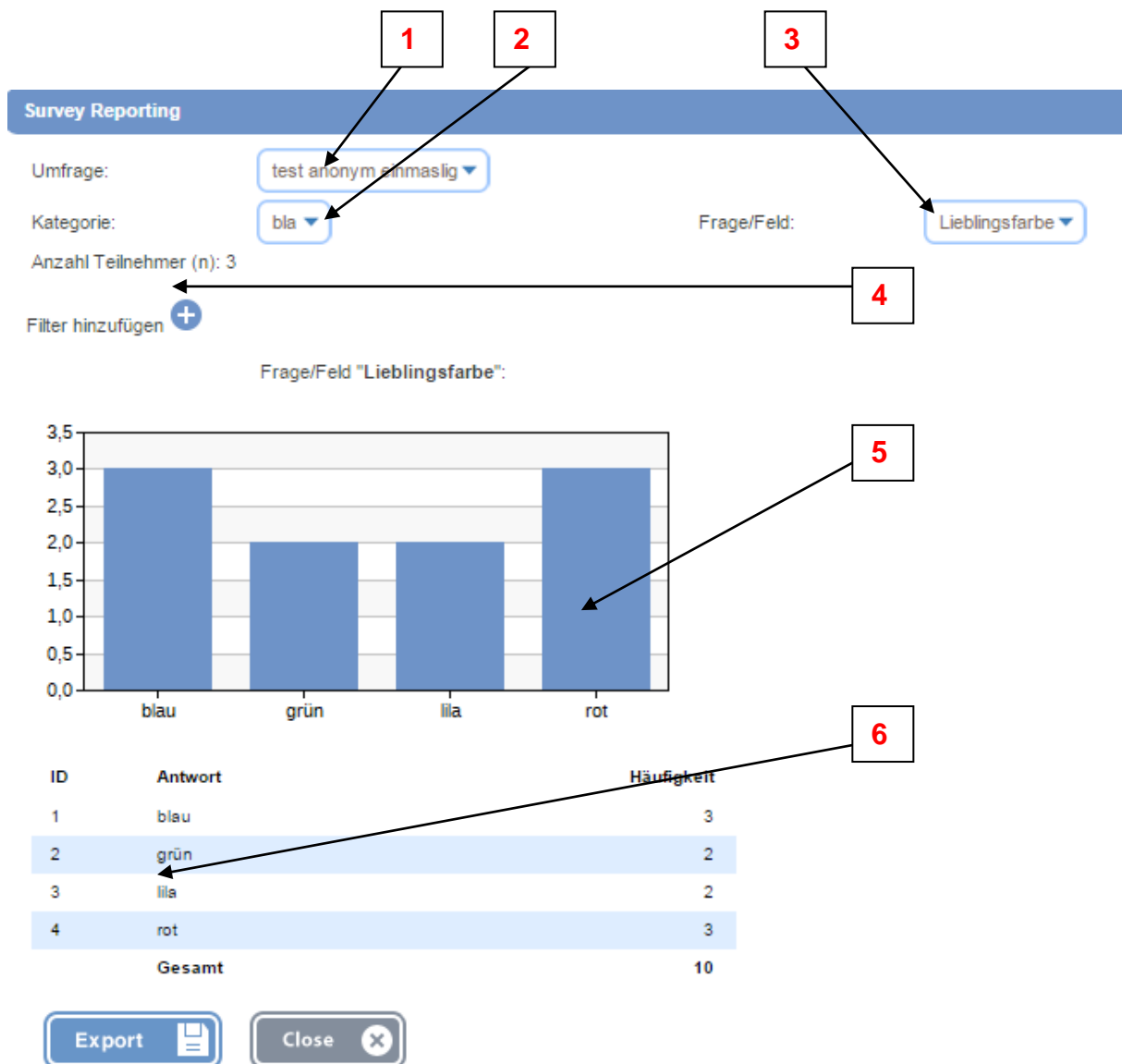| ID	Label / Name	Description
1	Process	Use this drop-down list to choose a process.
2	*Contacts* item	Expand this accordion item to view the contacts related to the process.
3	*Timeline* item	Expand this accordion item to view the timeline graph.
4	Date range	When you have selected your date/time range, the views will adjust to your selected range. This allows you to easily filter your campaign results.
5	Export	Click this button save your campaign report in a CSV file.

4. Survey Reporting

Click this icon to view the survey reporting:

This popup window opens:

ID	Label / Name	Description
1	Survey	Use this drop-down list to choose a survey.

2	Category	Use this drop-down list to choose a survey category.
3	Questio	Use this drop-down list to choose a survey question.
4	Add filter condition	Define filter conditions to refine your search and get more precise and accurate search results.
5	Results	Survey results report including pie charts or bar graphs.
6	Export	Click this button save your survey responses in a CSV file.

5. Event Reporting

Click this icon to view the event reporting:

This popup window opens:

ID	Label / Name	Description
1	Event	Use this drop-down list to choose an event.
2	Attendees	List of all confirmed attendees.
3	Export	Click this button save a list of all attendees in a CSV file.

(10)   Disclaimer

Figures and illustrations in this User Guide are provided for reference only and may differ from actual product appearance. GUI design and specifications may be changed without notice.