



# USER MANUAL

# INDEX

<a href="#">Slide 3</a>	-	Introduction
<a href="#">Slide 4</a>	-	Home Page
<a href="#">Slide 5</a>	-	Adding New Group
<a href="#">Slide 6 - 7</a>	-	Naming of groups and settings
<a href="#">Slide 8 - 9</a>	-	Browsing and Importing Data
<a href="#">Slide 10</a>	-	Exporting Database
<a href="#">Slide 11</a>	-	Adding Individual Data
<a href="#">Slide 12</a>	-	Searching Individual Email Address
<a href="#">Slide 13 - 15</a>	-	Important facts to know when designing your email message
<a href="#">Slide 16 - 17</a>	-	Creating an email message/template
<a href="#">Slide 18 - 22</a>	-	Schedule and Pre-send email message
<a href="#">Slide 23</a>	-	Important facts to know when creating your SMS message
<a href="#">Slide 24</a>	-	Creating a SMS message
<a href="#">Slide 25 - 28</a>	-	Schedule and pre-send sms message

# INTRODUCTION

This manual is a step by step basic guide of how to use the OUTBOXED system.

It will help you traverse all the stepping stones if you need help with anything.

Please make sure that you have a valid username and password to access your profile on the OUTBOXED system.

We pride ourselves with high quality service and professionalism - we look forward to working with you!



# HOME PAGE

Welcome to the Certech control panel! Please choose your module below.



Administration



Certech



Voucher



What else is available?

## Notices

No current notices

## Awaiting Authorisation

None

# ADDING NEW GROUPS

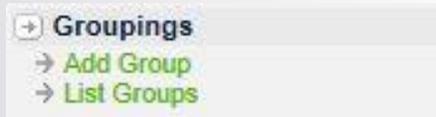
- On the home page click on administration



- Client Groupings

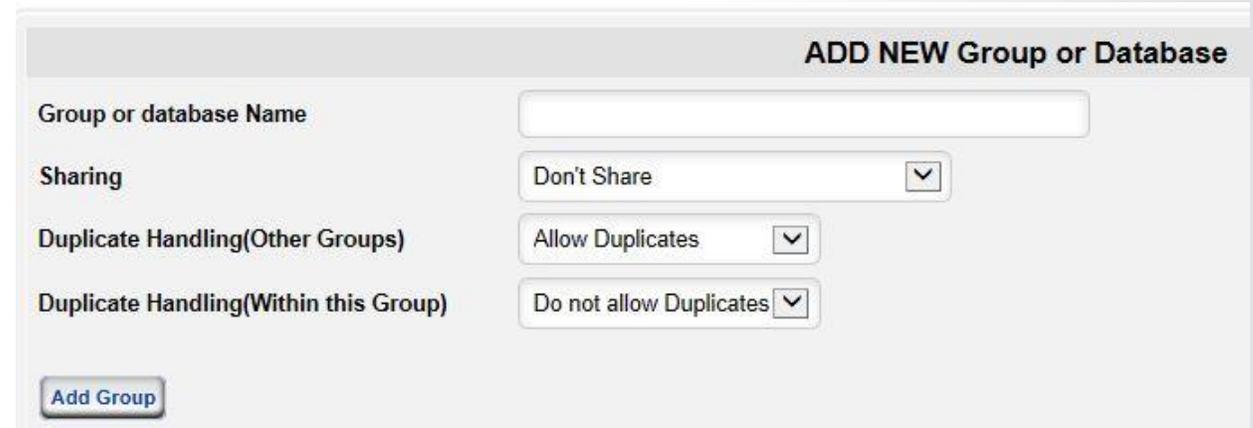


- On your left hand side click on "Add Group"



# NAMING OF GROUPS AND SETTINGS

1. Name your group
2. Sharing – Don't share if only one profile
3. Duplicate Handling (Other Groups) – Allow Duplicates (Only when you have one group).
4. Duplicate Handling ( Within this Group) – Always on Do not allow Duplicates
5. Note: When you have more than one group, save settings of both duplicates to “Do not Allow Duplicates”. This will prevent duplication of email addresses.
6. Click “Add Group”



**ADD NEW Group or Database**

Group or database Name

Sharing

Duplicate Handling(Other Groups)

Duplicate Handling(Within this Group)

The following page will appear on your screen. This is where the group you have added will be.

List of your Existing Groups or Databases		
Name	Owner	
Unsubscribes	System Group	→ Import Data → Remove Entries → Export Data
Example	Yourself	→ Edit → Import Data → Export Data → Remove Duplicates (Cell) → Remove Duplicates (Email) → Reset Bounces → Delete
Presentd	Yourself	→ Edit → Import Data → Export Data → Remove Duplicates (Cell) → Remove Duplicates (Email) → Reset Bounces → Delete

Importing your data:

1. Click on “Import Data” on your right hand side directly opposite your group that you have created.

**NOTE:** Please **DO NOT** import your database into the “Unsubscribes” group.

# BROWSING AND IMPORTING

1. Browse the file that you have saved (Save Excel Spreadsheet as CSV comma delimited).
2. Click “Upload File”

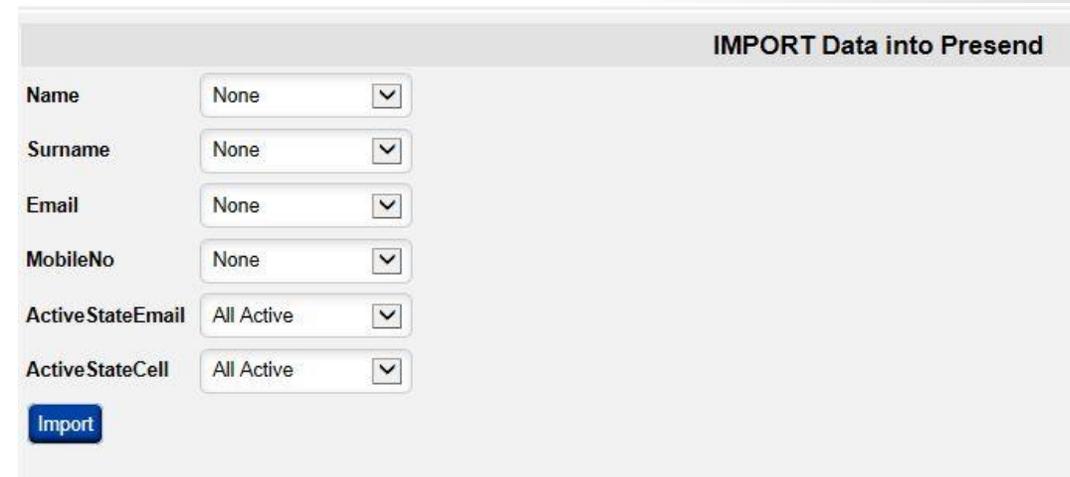


IMPORT Data into Presend

Upload file:  Browse...

My Data has a header row

1. Select dropdown bars accordingly as you have saved your headings in your Excel Spreadsheet.
2. Then click “Import”
3. The “Active State” Dropdown bars stays active at all times.



IMPORT Data into Presend

Name

Surname

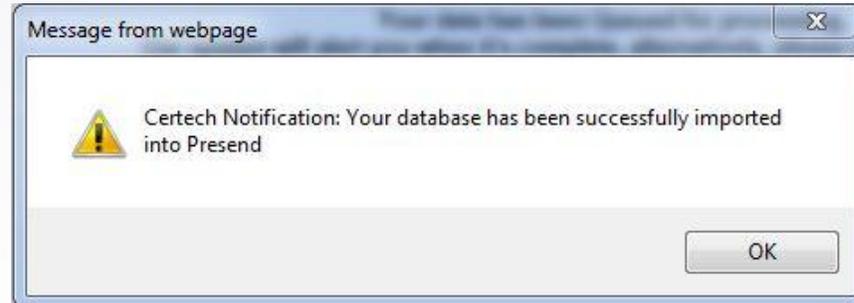
Email

MobileNo

ActiveStateEmail

ActiveStateCell

1. A notification will popup to notify you that your data was imported successfully.
2. Click ok



1. Click on "Group Report" on your left hand side to view all your groups and to view your total active and inactive email addresses.



# EXPORTING DATABASE

Name	Owner	
Unsubscribes	System Group	→ Import Data → Remove Entries → Export Data
Presend	Yourself	→ Edit → Import Data → Export Data → Remove Duplicates (Cell) → Remove Duplicates (Email) → Reset Bounces → Delete

Groupings  
→ Add Group  
→ List Groups

1. On your left hand side click on “List groups” to go back to your groups.
2. On your right hand side of the group Click on “Export Data”
3. Click on the green link to download your database.

[Download Database: demo2013-Presend-19-Nov-2013.zip](#)

# ADDING INDIVIDUAL DATA

1. On your home screen, click on the OUTBOXED link.



2. Click on the Contacts link.



3. On your left hand side of the screen, click on "Add contact".



4. The following screen will display and then you add the contact details.

A screenshot of a web form titled "Add Client". The form has a black header bar with the title "Add Client" in white. Below the header, there is a "Group" section with a "Grouping:" label and a dropdown menu showing "Present". Below this is a "Client Info" section with four input fields: "Name", "Surname", "Email", and "MobileNo". At the bottom of the form is an "Add" button.

Add Client	
Group	
Grouping:	Present ▼
Client Info	
Name	<input type="text"/>
Surname	<input type="text"/>
Email	<input type="text"/>
MobileNo	<input type="text"/>
<input type="button" value="Add"/>	

# SEARCHING INDIVIDUAL EMAIL ADDRESS

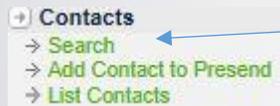
1. On your home screen, click on the OUTBOXED link.



2. Click on the Contacts link.



3. On your left hand side, click on "Search".



4. Search the email address in the group on the drop down bar.

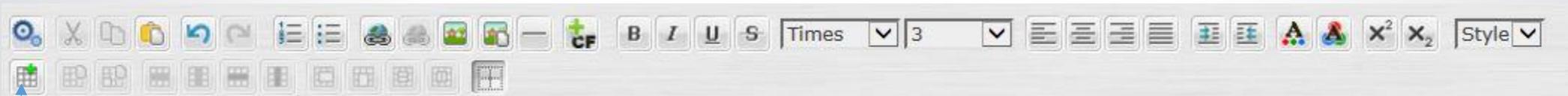
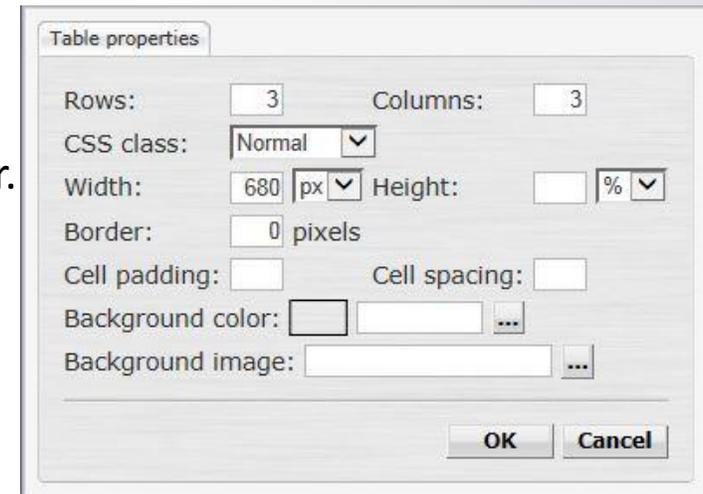


5. Change settings on the following screen as indicated below with the arrows and enter email address to this space and click search.

A screenshot of a search settings interface. It features four rows of search criteria, each with a dropdown menu for criteria, a dropdown for field name, a dropdown for operator, and a text input field. The first row is selected. Below the criteria is a "Sort by:" section with a dropdown menu set to "Email Address" and a "Search >>" button. Blue arrows point to the "Include ONLY entries where" dropdown, the "Email Address" field dropdown, the "Equals" operator dropdown, the empty text input field, the "Sort by:" dropdown, and the "Search >>" button.

# IMPORTANT FACTS TO KNOW WHEN DESIGNING YOUR EMAIL MESSAGE

- 1 a. Create a table when designing your mailer. By doing this you will be using the toolbar as indicated on below.
- b. Choose rows and columns (Recommended settings).
- c. CSS Class stays on normal.
- d. Your Width must be on 680 px and Height stays as indicated below.
- e. The border must be 0 pixels unless you want a border around your mailer.
- f. Then choose from 1 – 5.
- g. Cell Padding and Cell Spacing (Leave blank).
- h. Background colour and image remains on default. (Blank)
- i. Click ok.



2. Should you want to add in a hyperlink or email address link, on the toolbar click on the link as indicated below with the arrow.



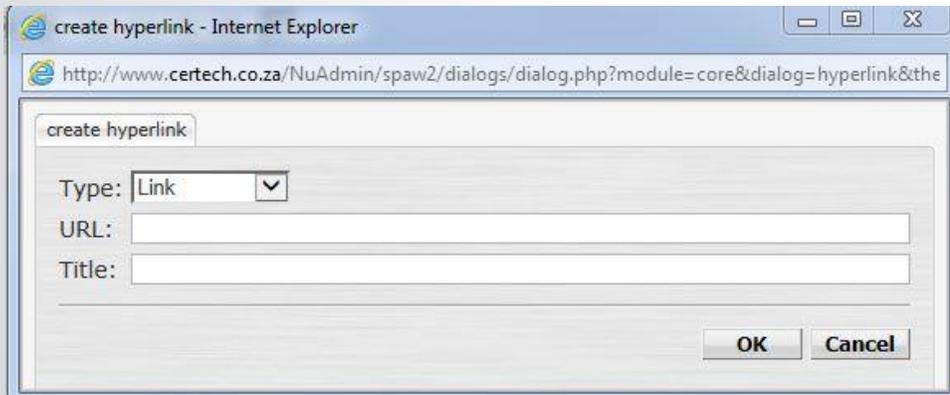
3. The screen below will popup. Leave the “Type” as is. In the “URL” space you can type in your website address or email address. (Remember to click on your mailer to where this link should be added to).

The format of typing in these links are as follows:

Website Address: http:// (then the address)

Email Address: mailto: (then the email address)

The title can be the name of the link you prefer to give it. It is not applicable should you wish not to use it. Click ok.



4. Important: Please save your progress regularly as there is no auto save function.
5. When you use images the resolution should be 72 dpi.
6. You can't copy information from a Word, Outlook or Excel document. Text may be copied from Notepad.
7. When creating an HTML you must use Dreamweaver.
8. Once finished designing your mailer on the OUTBOXED system click "Save Changes" at the left hand corner at the bottom of your screen.
9. Should you want to edit your message, click on the right hand side of your message "Edit message". Make changes on your message and remember to save these changes again.

Message:	Type:	Status:	
<b>Example</b> <ul style="list-style-type: none"><li>• Template contains 0 images (0.0KB)</li><li>• HTML Document Size: 0.1KB</li></ul>	Email Message	Active	<ul style="list-style-type: none"><li>→ Edit Details</li><li>→ Edit Message</li><li>→ Limited Attachments</li><li>→ Preview</li><li>→ Delete Template</li></ul>



# CREATING AN EMAIL MESSAGE/TEMPLATE

1. On your home screen, click on the OUTBOXED link.
4. Name your message and change the “Medium” setting to Email as per example below. Leave other settings as is. Click “Add”.



2. Click on the messages link.



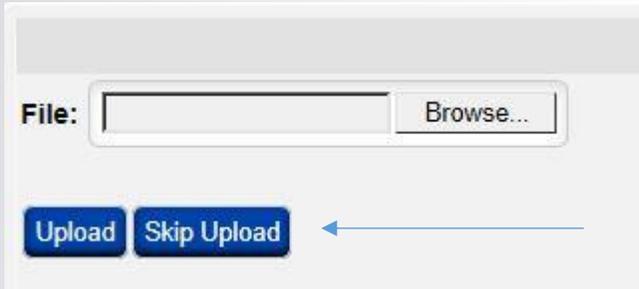
3. On your left hand side of the screen click, “Add Message”.

A screenshot of a form for creating a message. It has four rows of dropdown menus: "Name" with "Example" entered, "Medium" with "Email" selected, "Type" with "Once off / Scheduled Message" selected, and "Sharing" with "No Sharing" selected. A blue "Add" button is at the bottom left.

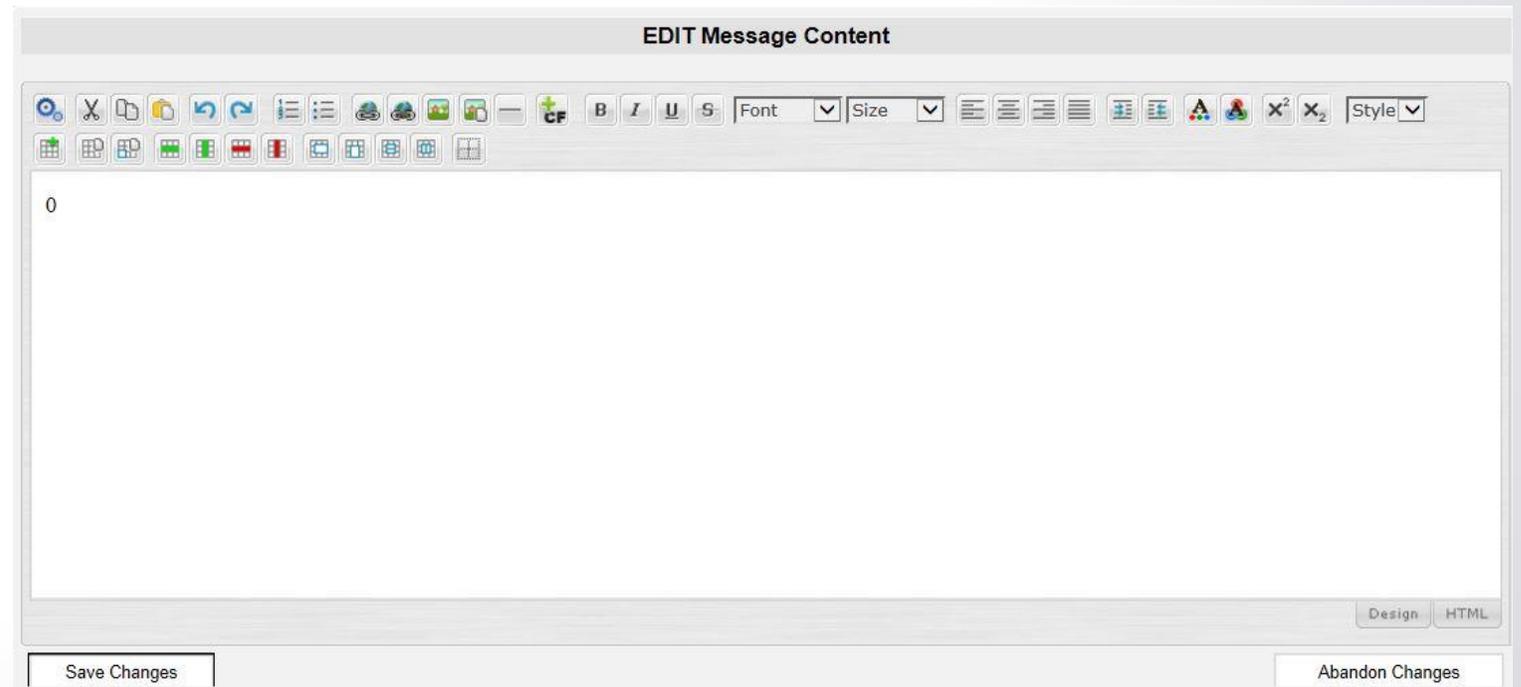
5. If you want to upload an HTML click on “Browse”, select the HTML file and upload. Select the HTML files accordingly to upload your message.

A screenshot of a file upload form. It has a "File:" label, an empty text input field, and a "Browse..." button. Below the input field are two blue buttons: "Upload" and "Skip Upload".

6. If you don't have an HTML and you are creating your message on the OUTBOXED system, click "Skip Upload".



7. The page below will appear on your screen and this is where you will be creating your message content. Note: Remove the "0".



8. You will be using these bars to design your message (colour, tables etc.).

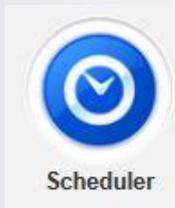


# SCHEDULE AND PRE-SEND EMAIL MESSAGE

1. On your home screen, click on the OUTBOXED link.



2. Click on the Scheduler link.



3. On your left hand side of the screen click on "Add scheduled event".



# PRE-SEND EMAIL MESSAGE

1. Schedule name: Name your schedule
2. Send Time: Now
3. Schedule Type: Once Off Schedule

## MESSAGE

1. Message Subject: Subject line that appears in email inbox when mailer sends out.
2. Header / Letterhead: RMB Services' design team will upload this and this is where you will have to select the Header / Letterhead.
3. Message: Select the message that you have created under messages.
4. Unsubscribe Message: This must always be selected.
5. Image Handling: Stays as indicated on the example.

The image shows two screenshots of a software interface. The top screenshot is titled 'Schedule' and contains the following fields: 'Schedule Name' with a text input containing 'Example', 'Send Time' with a dropdown menu set to 'Now', and 'Schedule Type' with a dropdown menu set to 'Once Off Schedule'. The bottom screenshot is titled 'Message' and contains the following fields: 'Message Subject' with a text input containing 'Example', 'Header / Letterhead' with a dropdown menu set to 'None', 'Message' with a dropdown menu set to 'Example', 'Unsubscribe Message' with a dropdown menu set to 'Unsubscribe', and 'Image Handling' with a dropdown menu set to 'Images are sent as part of the Message(Embedded)'. A button labeled 'Email' is visible between the two screenshots.

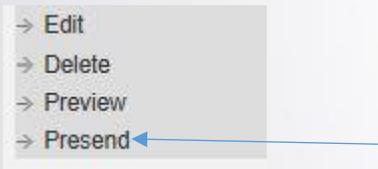
6. Don't select any groups or the report. Click add at the bottom of the page.
7. Your mailer will now be lying in the scheduler.
8. To preview your mailer click on the "Preview" link on your right hand side of the screen.



9. To go back to your scheduler click on "List scheduled events" on your left hand side of the screen.



10. To send yourself a pre-send click on "Present" on your right hand side of the screen.



11. Type in your email address and click on send. You will receive a notification to tell you that you will receive the pre-send shortly.

A screenshot of a form titled 'Send To'. It has a label 'Email Address' next to an empty input field. Below the input field is a 'Send' button.

# SCHEDULE EMAIL MESSAGE

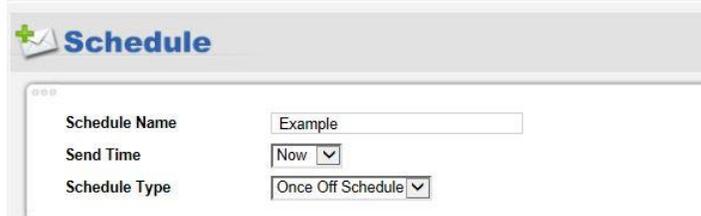
1. Schedule name: Name your schedule
2. Send Time: Time you prefer.
3. Schedule Type: Once Off Schedule

## MESSAGE

1. Message Subject: Subject line that appears in email inbox when mailer sends out.
2. Header / Letterhead: RMB Services's design team will upload this and this is where you will have to select the Header / Letterhead.
3. Message: Select the message that you have created under messages.
4. Unsubscribe Message: This must always be selected.
5. Image Handling: Stays as indicated on the example.

## SEND TO

1. Tab stays on Specific groups. Select the groups you want to send to.
2. Reporting: As indicated on example.
3. Email Report to: Automated email address will popup.
4. Click add.



**Schedule**

Schedule Name: Example

Send Time: Now

Schedule Type: Once Off Schedule



**Message**

Email

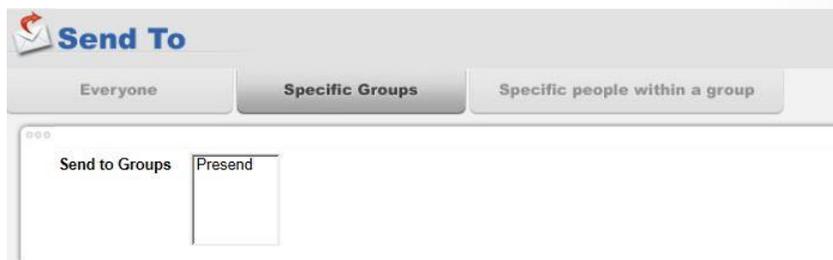
Message Subject: Example

Header / Letterhead: None

Message: Example

Unsubscribe Message: Unsubscribe

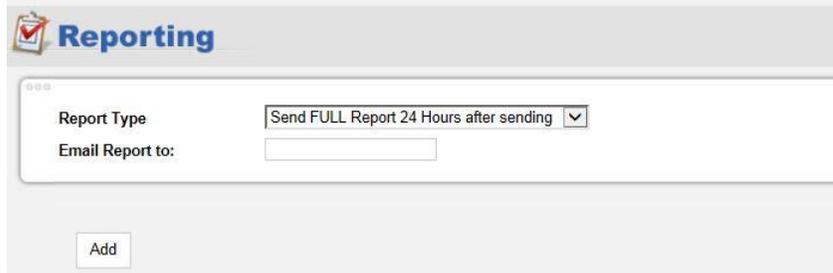
Image Handling: Images are sent as part of the Message(Embedded)



**Send To**

Everyone | **Specific Groups** | Specific people within a group

Send to Groups: Presend



**Reporting**

Report Type: Send FULL Report 24 Hours after sending

Email Report to:

Add

Your mailer will now be in the scheduler. Once you are 100% sure that everything is in order you may proceed and send out your mailer by clicking on the activate link. This will be on your right hand side of your mailer's location.



Your mailer will now be in the scheduler processing to send out.

24 hours after your mailer has been sent out you can view your report. This is located on the scheduler on the day that you have scheduled your mailer to send out. Clicking on the “Report” link in the scheduler next to your mailer that will then display “Processed”.



# IMPORTANT FACTS TO KNOW WHEN CREATING YOUR SMS MESSAGE

When sending your SMS, or requesting that we send it for you, please keep the following in mind:

An sms is limited to **160 characters**

Each space in a sms counts as one character

By LAW an opt out option is required, example "Reply STOP to opt out"

Correct mobile number formatting when importing Excel files into your OUTBOXED database: **0821234567**

**No spaces, special characters, 27 or +27\*\***

INCORRECT: 082 123-4567

INCORRECT: 27821234567

INCORRECT: +27 (0) 82 123 4567

\*\*The system will remove leading zero automatically. No further action to re-insert zero is required.

NOTE: Save Excel Spread Sheet as CSV comma delimited.



# CREATING AN SMS MESSAGE

1. On your home screen, click on the OUTBOXED link.



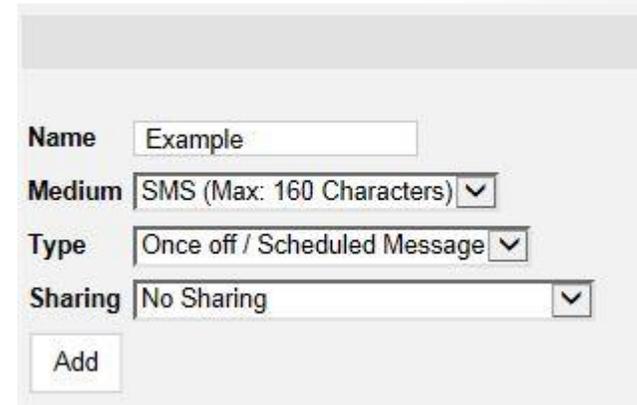
2. Click on the messages link.



3. On your left hand side of the screen click, "Add Message".



4. Name your message. Change settings as per example below. Click "Add"

The image shows a form for creating an SMS message. It has a light gray background. The form contains four rows of input fields, each with a label on the left and a text box or dropdown menu on the right. The first row is 'Name' with a text box containing 'Example'. The second row is 'Medium' with a dropdown menu showing 'SMS (Max: 160 Characters)'. The third row is 'Type' with a dropdown menu showing 'Once off / Scheduled Message'. The fourth row is 'Sharing' with a dropdown menu showing 'No Sharing'. Below the form is a white button with the text 'Add'.

5. A text box will appear and this is where you will be creating your sms message. Once done click on "Update". Your sms message will now be lying under your messages.

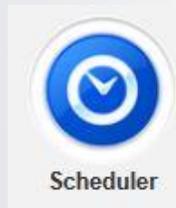


# SCHEDULE AND PRE-SEND SMS MESSAGE

1. On your home screen, click on the OUTBOXED link.



2. Click on the Scheduler link.



3. On your left hand side of the screen click on "Add scheduled event".



## PRE-SEND SMS MESSAGE

1. Schedule name: Name your schedule
2. Send Time: Now
3. Schedule Type: Once Off Schedule

### MESSAGE

1. Select the SMS tab as indicated in example.
2. Message: Select the sms message that you have created under messages.
3. Don't select any groups or the report. Click add at the bottom of the page.
4. Your sms message will now be lying in the scheduler.

The screenshot displays two parts of the Outboxed interface. The top section, titled 'Schedule', contains three input fields: 'Schedule Name' with the value 'Example', 'Send Time' with a dropdown menu set to 'Now', and 'Schedule Type' with a dropdown menu set to 'Once Off Schedule'. The bottom section, titled 'Message', features two tabs: 'Email' and 'SMS', with the 'SMS' tab selected. Below the tabs is a 'Message' dropdown menu with 'Example' selected.

5. To preview your sms message click on the “Preview” link on your right hand side of the screen.



6. To go back to your scheduler click on “List scheduled events” on your left hand side of the screen.



7. To send yourself a pre-send click on “Presend” on your right hand side of the screen.



11. Type in your mobile number and click on send. You will receive a notification to tell you that you will receive the pre-send shortly.

A screenshot of a 'Send To' form. It has a header 'Send To' in a grey bar, a label 'Cell Number' next to an empty input field, and a 'Send' button below.

# SCHEDULE SMS MESSAGE

1. Schedule name: Name your schedule
2. Send Time: Now
3. Schedule Type: Once Off Schedule

## MESSAGE

1. Select the SMS tab as indicated in example.
2. Message: Select the sms message that you have created under messages.
3. Select your group which you have created with the mobile numbers.
4. Reporting: Select the report as indicated on example. An automated email address will appear which should be left as is.
5. Click "Add".
6. Your sms message will now be lying in the scheduler.
7. Once you are 100% sure of your pre-send you can click on "Activate" on the right hand side of your screen opposite your sms message.

The screenshot displays the Outboxed SMS scheduling interface, which is organized into four main sections:

- Schedule:** This section contains three input fields: "Schedule Name" with the value "Example", "Send Time" with a dropdown menu set to "Now", and "Schedule Type" with a dropdown menu set to "Once Off Schedule".
- Message:** This section features two tabs, "Email" and "SMS", with the "SMS" tab selected. Below the tabs is a "Message" dropdown menu with "Example" selected.
- Send To:** This section has three tabs: "Everyone", "Specific Groups", and "Specific people within a group", with "Specific Groups" selected. Below the tabs is a "Send to Groups" dropdown menu with "Example" selected, and a "Presend" button.
- Reporting:** This section contains two input fields: "Report Type" with a dropdown menu set to "Send FULL Report 24 Hours after sending", and "Email Report to:" with the email address "dutoit.iavdean@gmail.cc".



# USER MANUAL

"The man who stops advertising to save money is like the guy who stops the clock to save time" - Thomas Jefferson