OUTBOXED

DIGITAL MARKETING DONE RIGHT

USER MANUAL

INDEX

INTRODUCTION

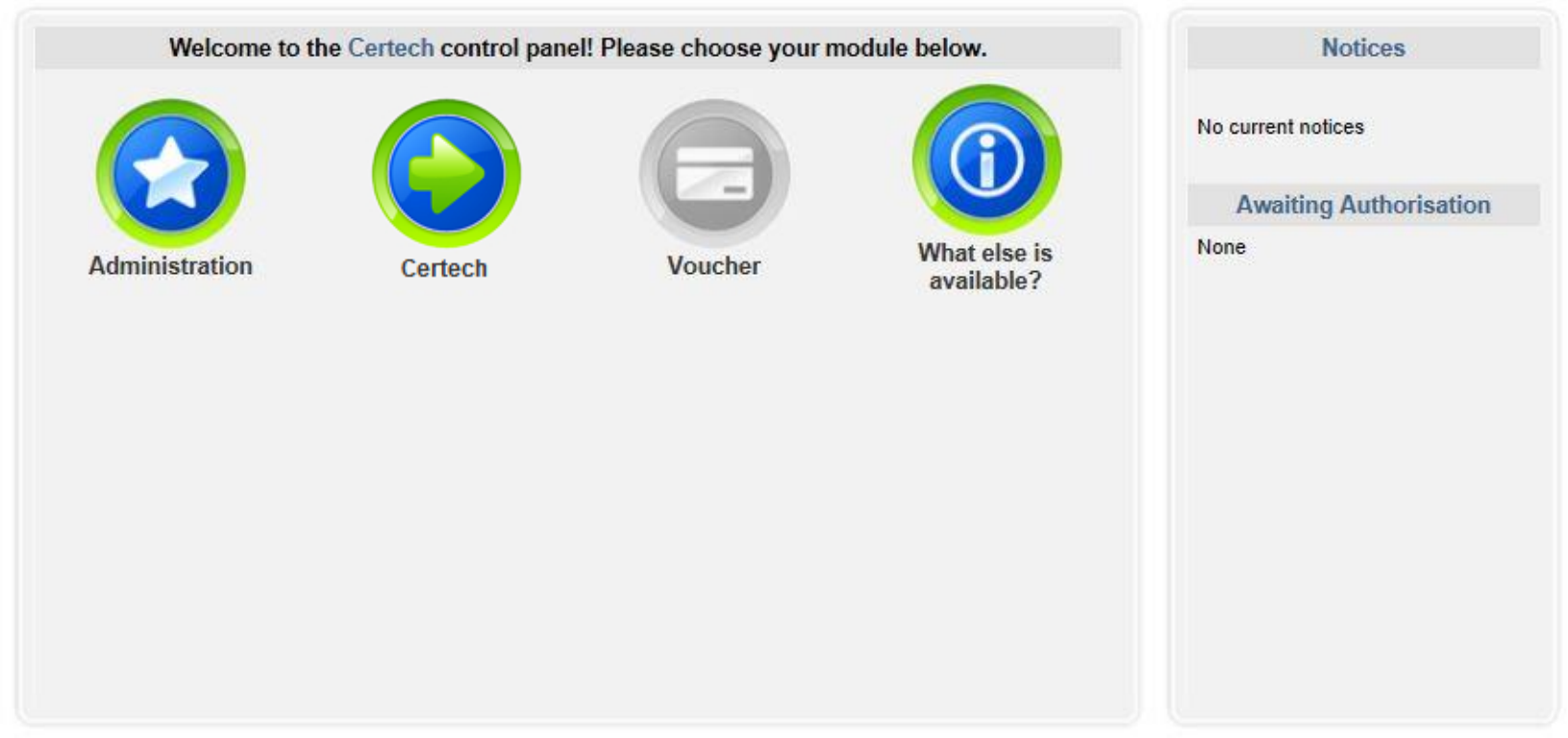
This manual is a step by step basic guide of how to use the OUTBOXED system.

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

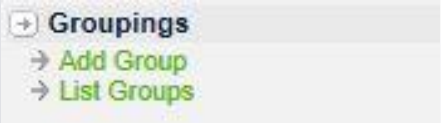


ADDING NEW GROUPS

- On the home page click on administration

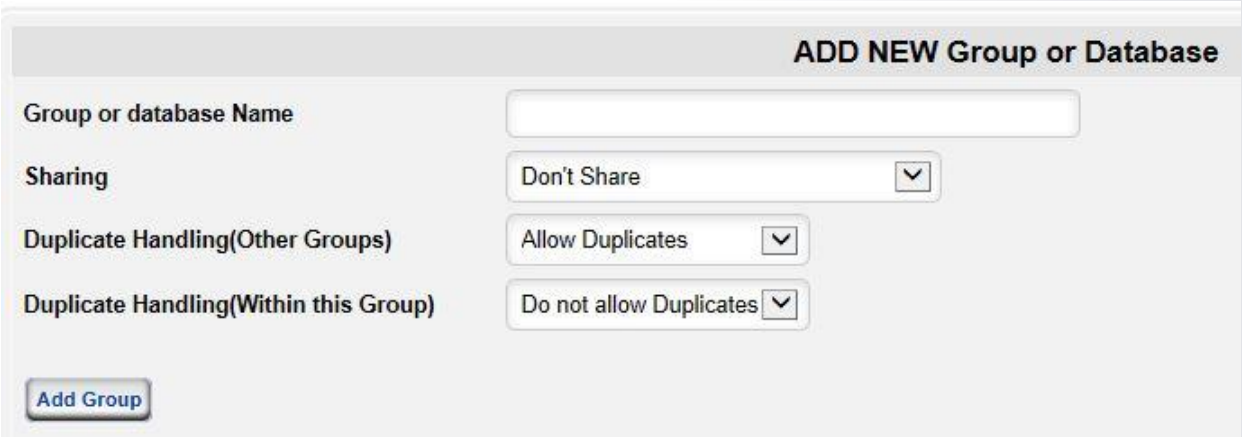
- Client Groupings

- 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"



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
Presend	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.

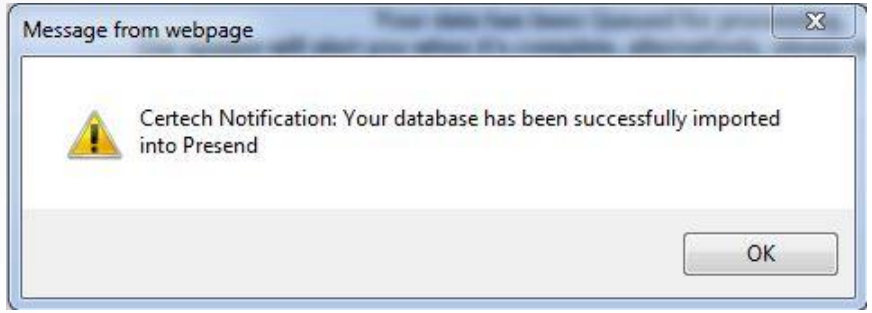
NOTE: Please DO NOT import your database into the “Unsubscribes” group.

BROWSING AND IMPORTING

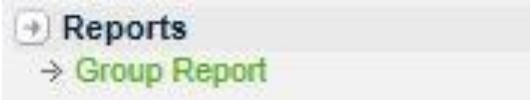
1. Browse the file that you have saved (Save Excel Spreadsheet as CSV comma delimited).
2. Click “Upload File”

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.

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

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.

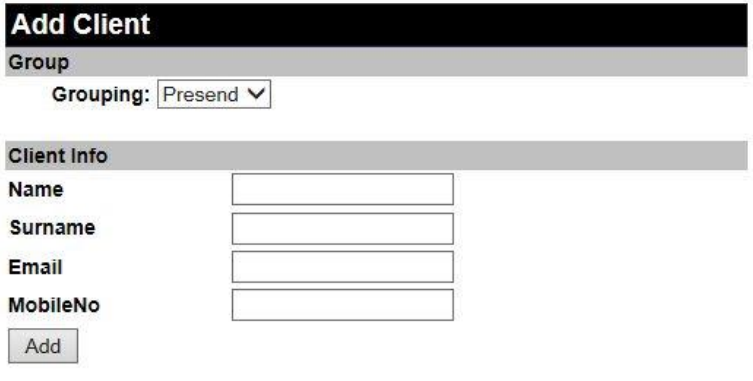
ADDING INDIVIDUAL DATA

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.



SEARCHING INDIVIDUAL EMAIL ADDRESS

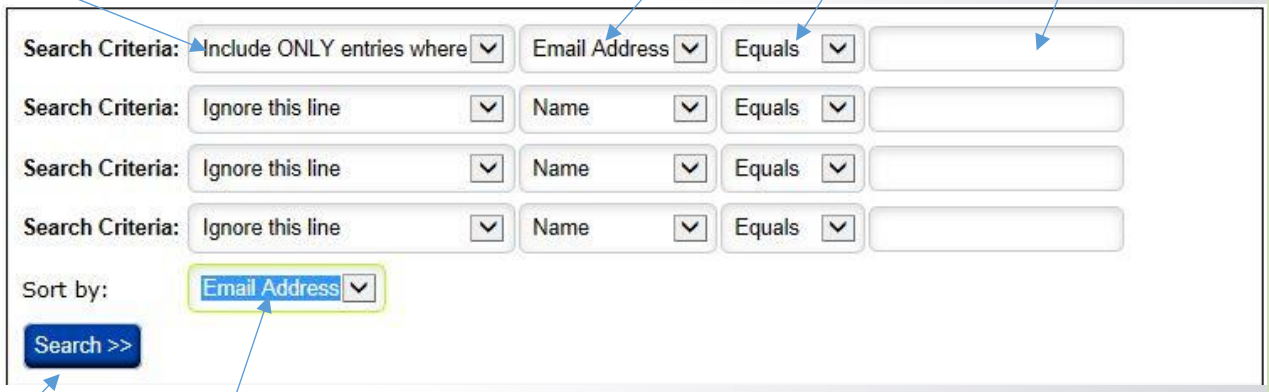
1. On your home screen, click on the OUTBOXED link.

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.



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.

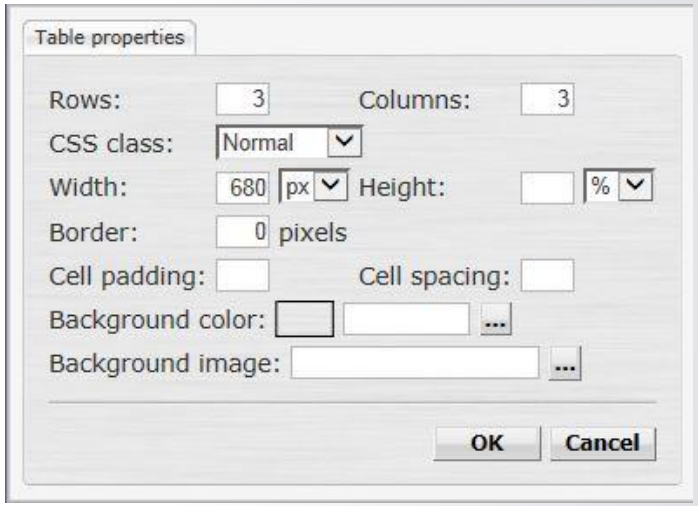
e. The border must be 0 pixels unless you want a border around your mailer.

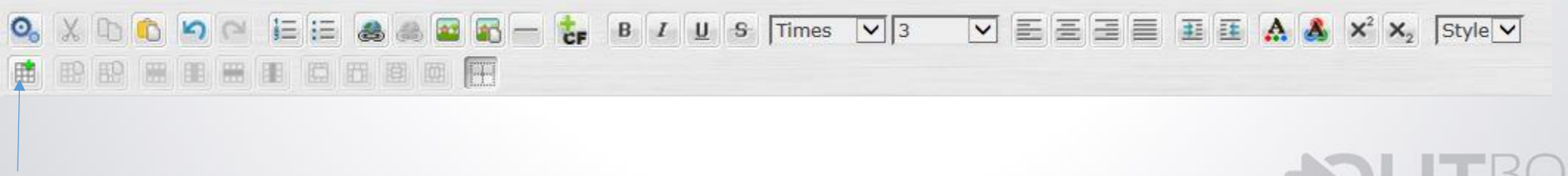
f. Then choose from 1 – 5.

g. Cell Padding and Cell Spacing (Leave blank).

h. Background colour and image remains on default. (Blank)

i. Click ok.





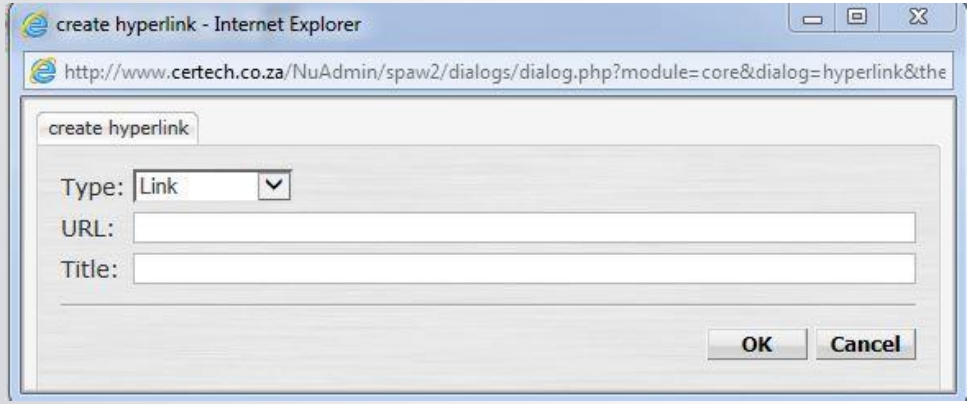
2. Should you want to add in a hyperlink or email address link, on the toolbar click on the link as indicated below with the arrow.

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 ma 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:	
Example • Template contains 0 images (0.0KB) • HTML Document Size: 0.1KB	Email Message	Active	Edit Details Edit Message Limited Attachments Preview Delete Template

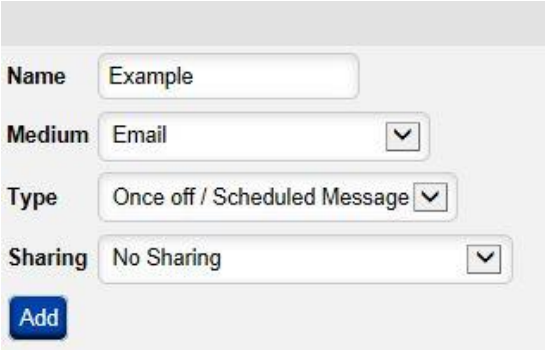
CREATING AN EMAIL MESSAGE/TEMPLATE

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”.

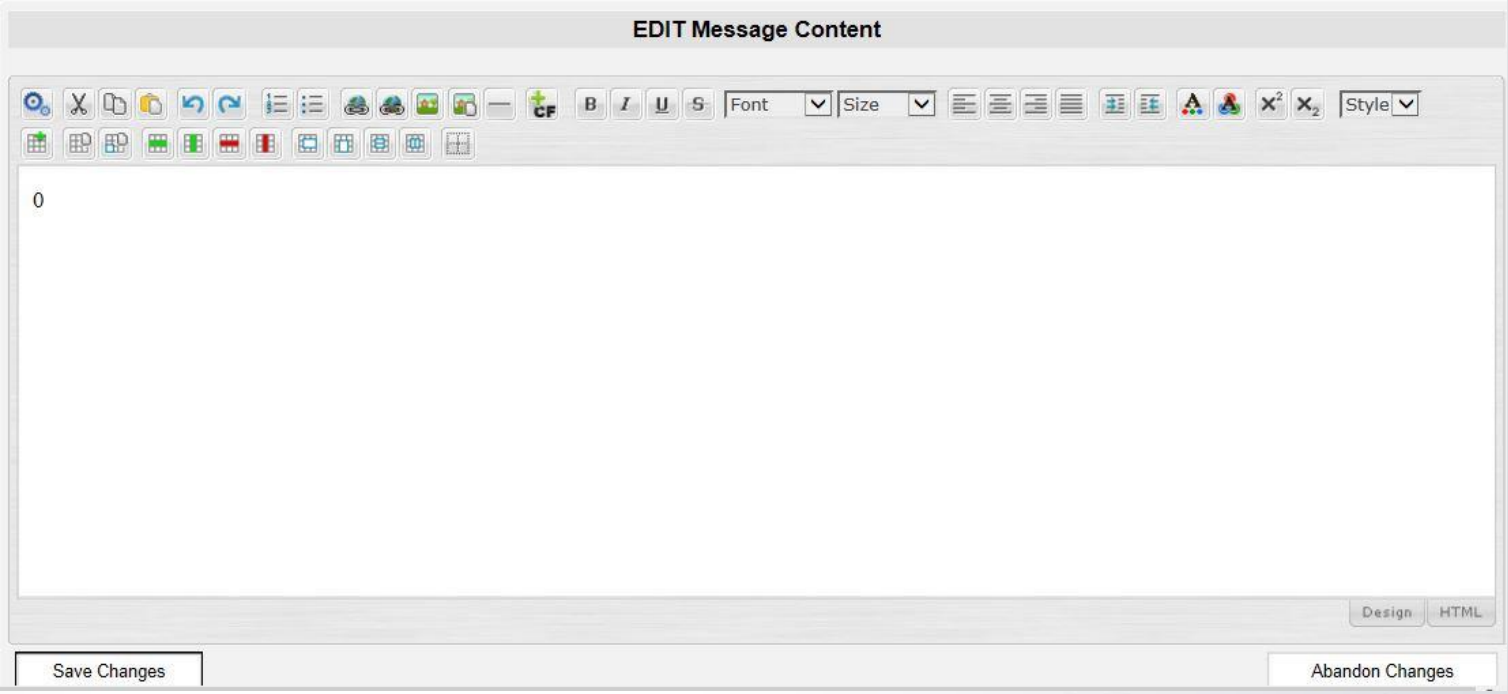
4. Name your message and change the “Medium” setting to Email as per example below. Leave other settings as is. Click “Add”.



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.

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.

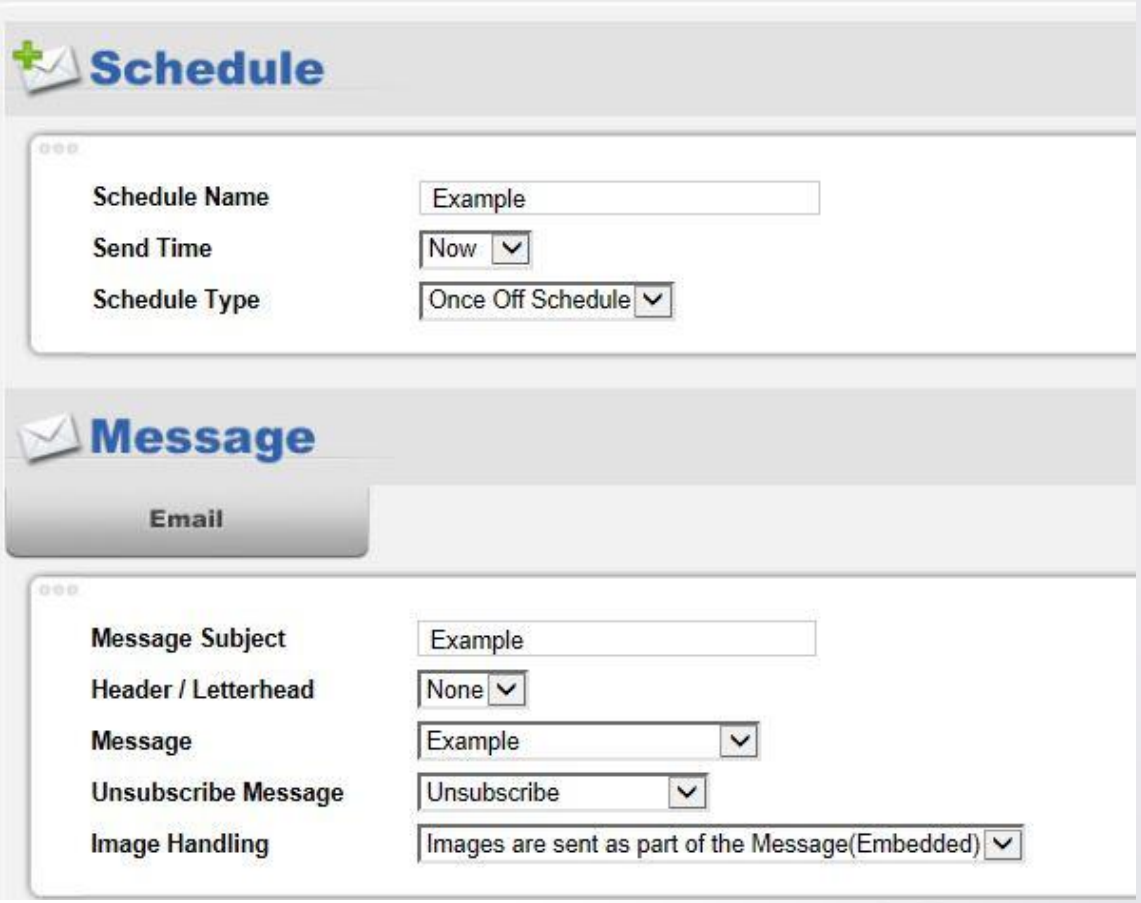
3. On your left hand side of the screen click on “Add scheduled event”.

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.



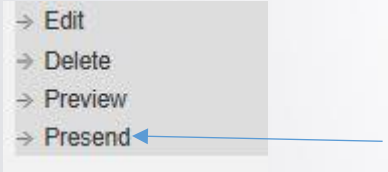
6. Don’t select any groups or the report. Click add at the bottom of the page.

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.

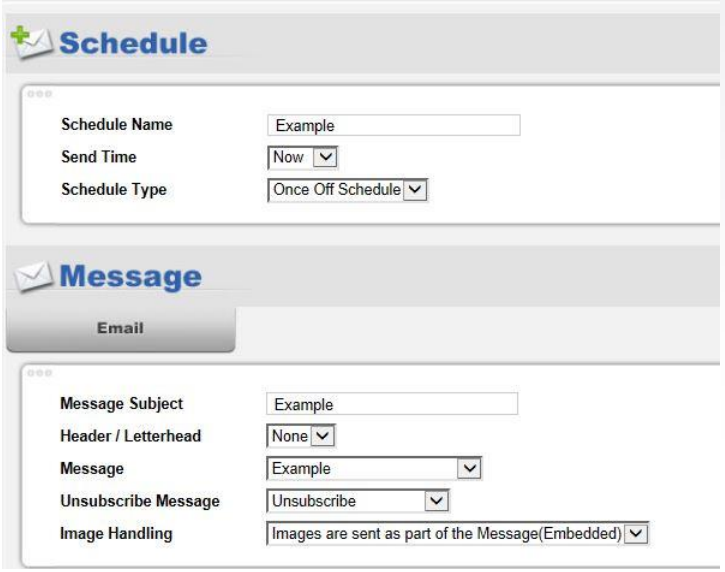
10. To send yourself a pre-send click on “Presend” on your right hand side of the screen.



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.

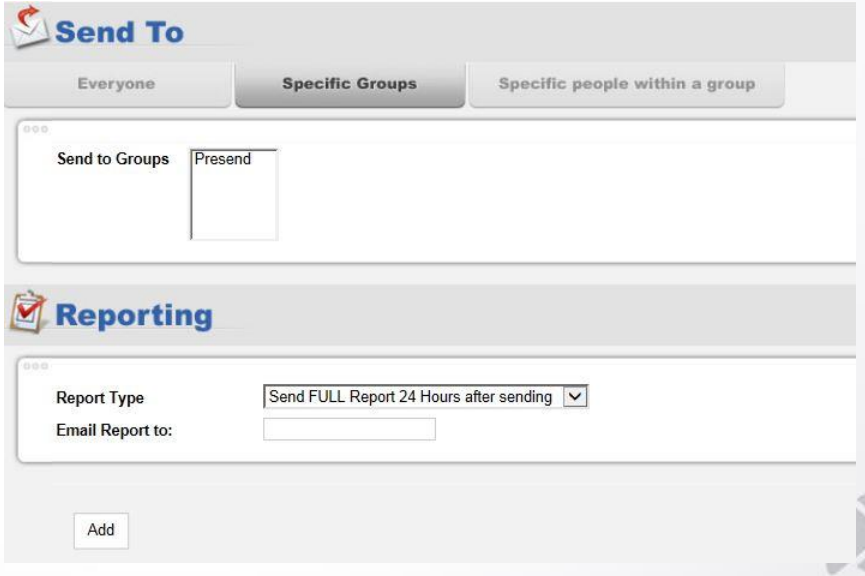
SCHEDULE EMAIL MESSAGE

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



MESSAGE

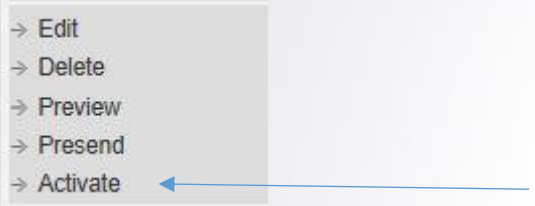
1. Message Subject: Subject line that appears in email inbox when mailer sends out.
2. Header / Letterhead: RMB Services's design team will upload this and this is where you will have to select the Header / Letterhead.
3. Message: Select the message that you have created under messages.
4. Unsubscribe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



SEND TO

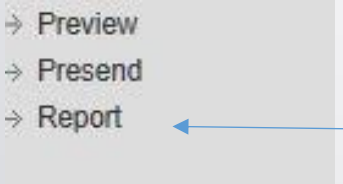
1. Tab stays on Specific groups. Select the groups you want to send to.
2. Reporting: As indicated on example.
3. Email Report to: Automated email address will popup.
4. Click add.

Your mailer will now be in the scheduler. Once you are a 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.

OUTBOXED
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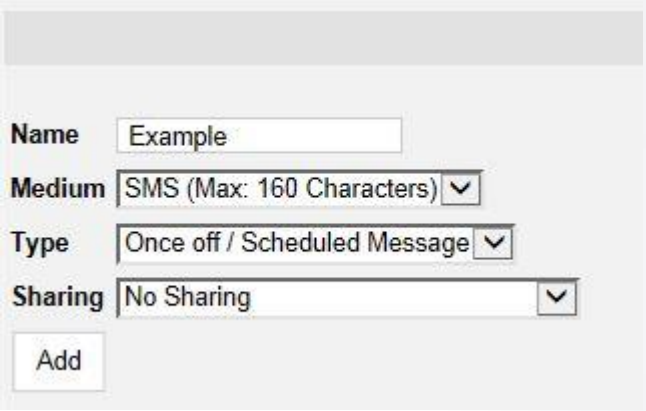
CREATING AN SMS MESSAGE

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”



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.

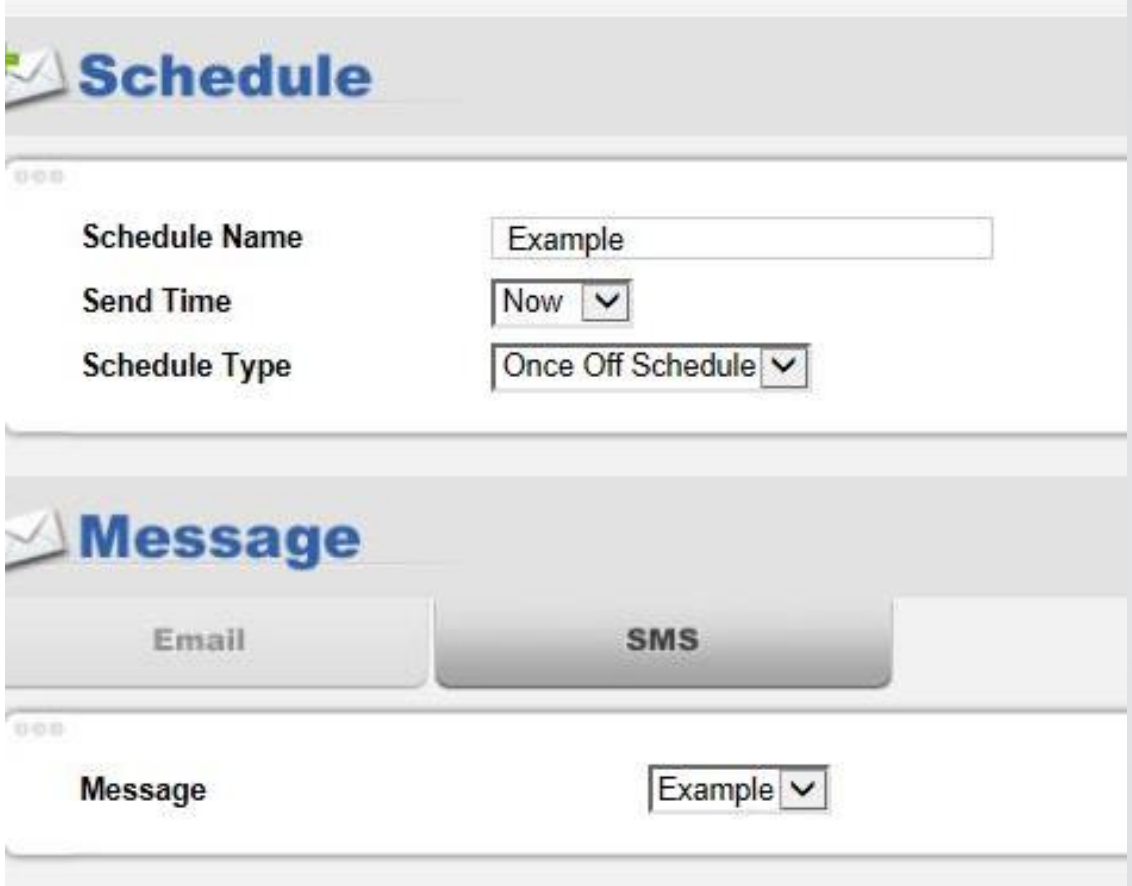
3. On your left hand side of the screen click on “Add scheduled event”.

PRE-SEND SMS MESSAGE

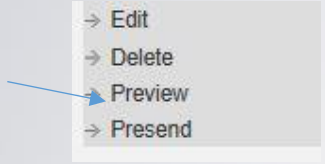
1. Schedule name: Name your schedule
2. Send Time: Now
3. Schedule Type: Once Off Schedule

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.

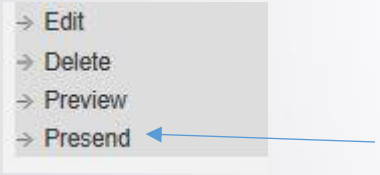


5. To preview your sms message click on the “Preview” link on your right hand side of the screen.



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.



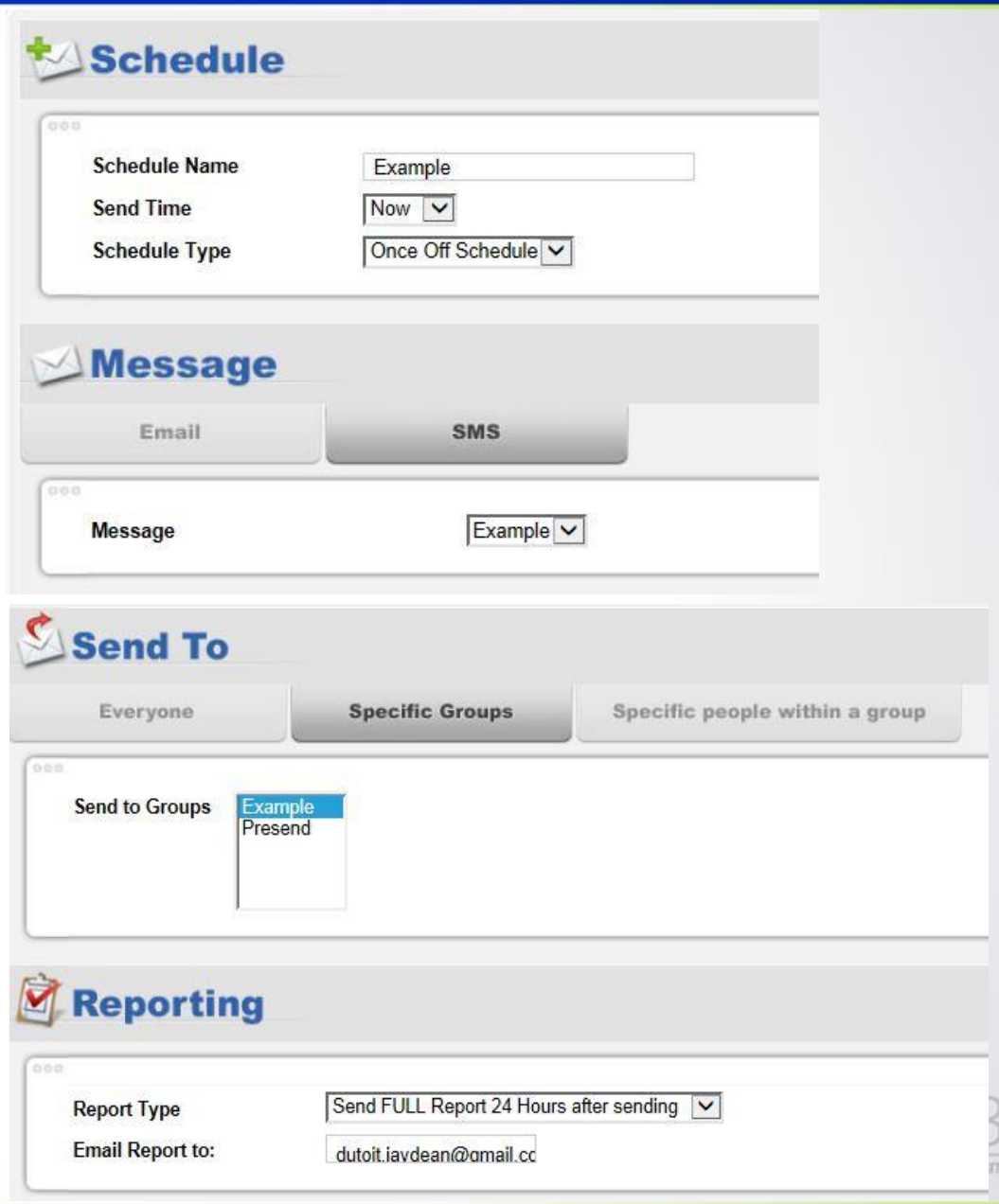
11. Type in your mobile number and click on send. You will receive a notification to tell you that you will receive the pre-send shortly.

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.



OUTBOXED

DIGITAL MARKETING DONE RIGHT

USER MANUAL

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