

SMARTMESSAGES

Smartmessages User Guide

Spring 2023

This is a user guide for the Smartmessages email marketing system,
covering the practical aspects of getting around, creating templates,
importing lists, and sending mailshots.

For in-depth technical information, read our online help pages at
wiki.smartmessages.net

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Getting started

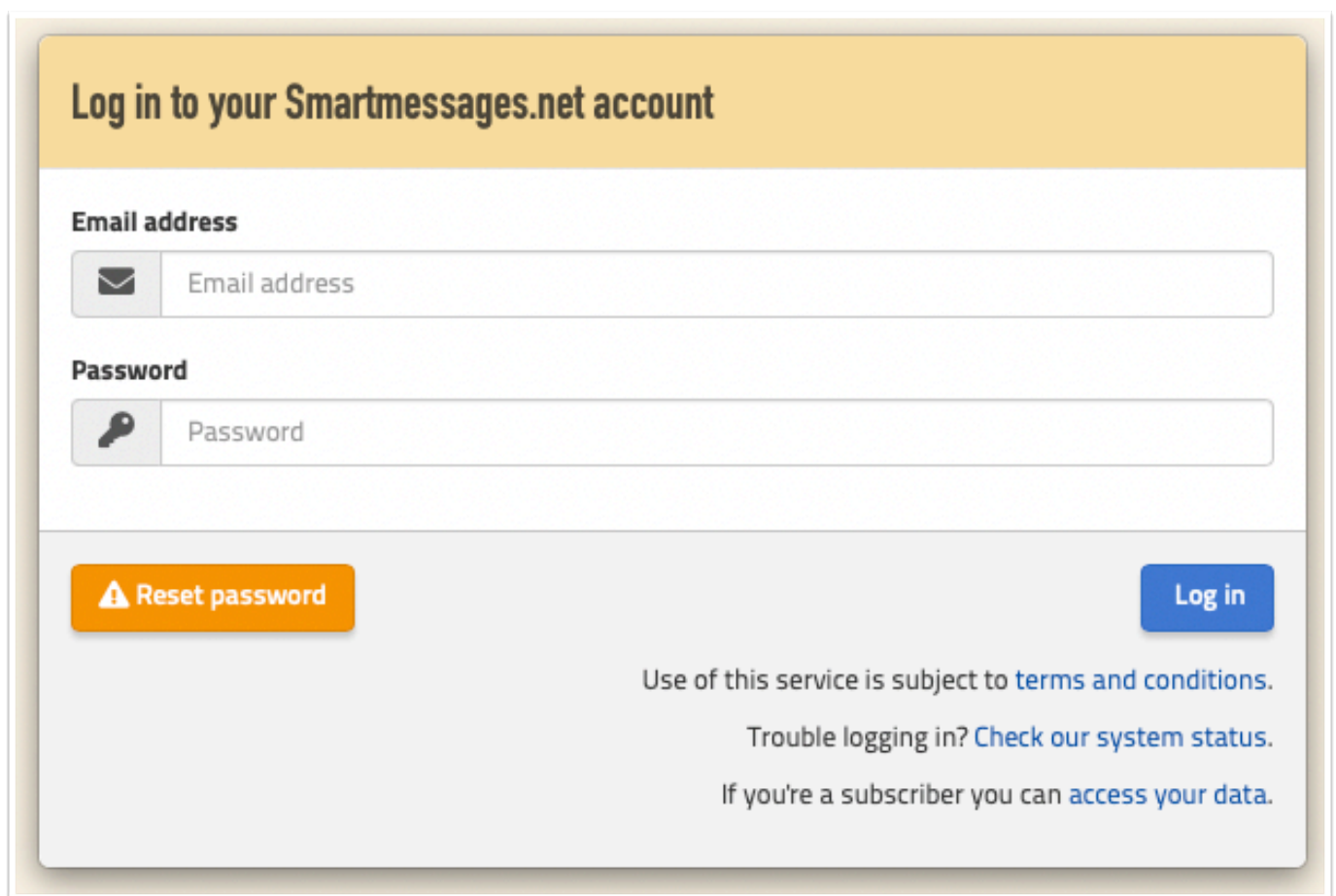
Logging in

To get in to Smartmessages, go to the login page at <https://www.smartmessages.net/login.php>

Enter your email address and your password, and click “Log in”.

If you’ve forgotten your password, click “Reset password”, fill in the reset form, and we’ll email you a password reset link.

Because your password is used to protect not only *your* data, but also the data of *all your subscribers*, we enforce the use of strong passwords. Our password strength requirements are quite strict, so we strongly recommend using a password manager to generate and store your passwords – [1Password](#) is very good. Put it like this – if your password is easy to remember, it’s probably not strong enough!

The image shows a login form for Smartmessages.net. It has a yellow header with the text "Log in to your Smartmessages.net account". Below this, there are two input fields: "Email address" with an envelope icon and "Password" with a key icon. At the bottom left is an orange button with a warning icon and the text "Reset password". At the bottom right is a blue button with the text "Log in". Below the buttons, there is a line of text: "Use of this service is subject to [terms and conditions](#)." followed by "Trouble logging in? [Check our system status](#)." and "If you're a subscriber you can [access your data](#)."

We don't ask you for cookie consent because we do not set any persistent or third-party cookies!

The screenshot displays the Smartmessages user interface. At the top, there's a navigation bar with tabs: Admin, Home, Templates, Contacts, Send, Mailings, Files, and Account. The user is logged in as 'Smartmessages Demo' with a 'Switch account' button. The main content area is divided into several sections:

- Account status: Smartmessages Demo**: A welcome message to 'Andrew', a 'Sending credits remaining: 6,800' indicator, and a table of account activity.
- Setup checklist**: A list of setup tasks with status indicators (On, green check, or red X).
- Recently completed mailshots**: A table showing details of recent mailshots.
- Help and support**: Links to online help, user guide, email support, phone support, and social media.

Account activity table:

Account	Credit balance	Mailshots this month	Messages this month
This account	6,800	9	1,914
Child Account 1	1,400	8	1,023
Child Account 2	1,400	13	2,048
Child Account 3	1,400	11	2,102

Recently completed mailshots table:

Mailshot	Date	Count	Opens	Clicks
Blog RSS Feed 17	Thu, Mar 19, 15:51	4	9	0
Blog RSS Feed 17	Fri, Mar 6, 15:53	4	8	1
Blog RSS Feed 16	Tue, Feb 25, 19:08	4	13	0
Blog RSS Feed 15	Tue, Feb 25, 18:56	4	11	0
Blog RSS Feed 14	Tue, Feb 25, 18:41	4	4	0

Setup checklist:

Task	Status
Open and click tracking	On
Contact details	✓
Set up your branding	✓
Upload your logo	✓
Domain authentication	✓
Analytics integration	✗
Set up an anti-phishing page	✓
Social network setup	✓
Import a mailing list	✗
Send a mailshot	✓

After you've logged in, you'll arrive at the home page.

As you can see Smartmessages uses a tab-driven interface, dividing things up into logical areas across the top tab bar.

This home page gives you a quick overview of your account status, your recent mailings, some pointers to help you improve your account setup, and links to feedback and support.

For detailed help and technical documentation, click the "Help" tab and you will be taken to our help pages at <https://wiki.smartmessages.net/>.

To log out, click the "Log out" button on the right.

Account setup

Before you send anything, it's important that your recipients know who you are, that your messages are sent in accordance with the law, and that your branding is maintained consistently, so click on the "Account" tab to configure your account.

There are several sections on the account settings page:

Personal Settings

We like to know who you are so we can address you by name, and your recipients can know who you are too, so enter your name here.

Settings Branding Statistics Users Agency Buy Smartmessages.net Services Affiliates

Personal Settings Contact details Callbacks Social Tracking & Analytics Domain auth

Personal Settings for andrew@smartmessages.net

First name Last name Time zone ⓘ

Europe/London

✓ Save settings

Change password

New password ⓘ Enter new password again ⓘ

Password Password

Set new password

Time Zone

When you schedule mailshots or view times for sends, opens clicks etc, the times are corrected for your time zone – but you need to ensure your time zone is set correctly here for that to happen. We default to the Europe/London zone. If your exact city isn't listed, pick the closest one in your zone, or a named zone (such as EST).

Password Reset

To set a new password, enter it twice (to ensure you don't make a mistake) and click 'Set new password'. If you forget your password, you can reset it from the login page – just click the "Reset password" button.

Account Details

Complete your company details to provide important contact details. These details can be used automatically in email templates and all the customer facing screens.

UK legislation requires you to provide a postal address and company number (if you have one). Providing a default from name and address will save setting them manually on your mailshots.

The screenshot shows the 'Contact details' section of the Smartmessages account settings. The form includes the following fields and values:

- Account name:** Smartmessages Demo
- API key:** 7fsUw11QrUmj7bp4GVGKkS
- Main phone number:** 01273 385830
- Street address:** 221b Baker Street
- Post town / city:** London
- Post code / zip:** W1U 6AF
- Main URL:** https://www.smartmessages.net
- RSS feed URL:** (empty)
- Main email address:** info@smartmessages.net
- Country:** United Kingdom
- Default from name:** (empty)
- Default from address:** (empty)
- Company number:** 123456
- VAT number:** 123 45687
- Commission rate:** 20.00
- Anti-Phishing URL:** https://info.smartmessages.net/anti-phishing-page/ (with a 'Check' button)

A 'Save settings' button is located at the bottom left of the form.

Account Name

Generally we can't change your account name as it will break URLs for existing content that you may have already sent to your subscribers, but it may be possible in some cases. If you're interested in additional accounts for branding purposes, please contact us.

API Key

You'll need this if you want to use our API that lets you automate, integrate and remote-control Smartmessages from your own systems. See our help wiki and GitHub repository for more info.

Read our help wiki for more info. <https://wiki.smartmessages.net/>

Find our Github repository here – <https://github.com/Smartmessages>

Anti-Phishing URL

Some of your recipients may be rightly concerned whether messages sent through Smartmessages really come from you. Phishing (pretending to be someone else in order to gain personal information or access to their computer) is a persistent problem for any site that potentially holds personal data.

To dispel these fears we provide this non-technical measure to provides some reassurance that we are acting in good faith (i.e. that you really are using our services) and not pretending to be you. To do this you place a web page containing a link back to us somewhere on your own site saying that you are using our services (it doesn't need to appear anywhere in your own site's menus, just to be directly accessible on your domain), and we will point recipients there wherever we ask for personal details.

The domain should match the one you use for sending email, so if you send from 'news@example.com', your anti-phishing page should be somewhere on 'www.example.com'. Because this is a complete closed loop (faking it would require compromises of both your site and ours), it provides a reasonable basis for reassurance.

You should also add our domain to your SPF record (see "Domain authentication") which provides further anti-forgery protection and can dramatically improve delivery rates.

Callbacks

Callbacks are used to connect Smartmessages with other systems, providing efficient, near real-time synchronisation and feedback on a wide variety of events that occur within Smartmessages, such as open, click, subscribe, unsubscribe and mailshot completion.

The screenshot shows the 'Callbacks' settings page in the Smartmessages interface. At the top, there is a navigation bar with tabs: Settings, Branding, Statistics, Users, Agency, Buy Smartmessages.net Services, and Affiliates. Below this, a sub-navigation bar includes Personal Settings, Contact details, Callbacks (selected), Social, Tracking & Analytics, and Domain auth. The main heading is 'Callbacks'. A descriptive paragraph explains that callbacks are technical services for real-time sync, using an example of posting an event to a CRM. Below the text, there are three main sections: 1. 'Callbacks enabled' with a toggle switch and a help icon. 2. 'API/MAC key' with a help icon and a red alphanumeric key '7fsUw11QrUmj7bp4GVGKkS'. 3. 'Callback URL' with a text input field and a help icon. A blue 'Save settings' button is located below the URL field. On the right side, there is a 'Callback Events' section with a help icon and a list of events: Click (highlighted in blue), Open, Subscribe, Unsubscribe, Mailshot started, Mailshot complete, Spam report, Bounce, List upload complete, List upload failed, and Subscriber deleted data.

These options let you enable and disable callbacks (we will disable them if your callback handler stops working), set your callback URL, and choose which events you'd like to receive. Refer to our help pages for more details.

Social Networking

Here you can enable our social networking features. They will appear on public pages such as your subscribe and unsubscribe pages. Combine this with the social networking tags available in our template editor and whenever someone "likes" your email, then it will be published, tracked and the results recorded in reports.

We directly support 4 social media networks, others can be added manually. Full details of Smartmessages' social networking features can be found in our wiki help pages.

Settings
Branding
Statistics
Users
Agency
Buy Smartmessages Services
Affiliates

Personal Settings
Contact details
Callbacks
Social
Analytics
Domain auth

Social networking

Social networks are an important part of keeping in touch with your customers, so we make it as easy as possible to integrate your social presence in to your mailshots and subscriber interactions. Enter your social network identities here and we will make use of them on public pages such as your subscribe and unsubscribe pages, and enable various template tags. There is an enormous variety of social networking features available in our templates, and you can find full details on [our help pages](#).

Twitter ID ⓘ

@
Smartmessages

LinkedIn page ⓘ

https://www.linkedin.com/
company/smartmessages

Facebook page ⓘ

https://www.facebook.com/
smartmessages.net

Instagram profile ⓘ

https://www.instagram.com/

☒ Use open graph tags ⓘ

Save settings

User Tracking

There are two types of tracking, consent based and anonymised. The system default is no tracking, with a click of a button the tracking can be switched.

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Tracking & Analytics
Domain auth

User activity tracking

If you want to maintain the privacy of your subscribers' activities, and/or implement your own tracking mechanism independent of Smartmessages, leave this option unchecked. Bear in mind that tracking may not be legal in your subscribers' jurisdiction, so it is off by default, it's your decision to enable it, and you assume all liability for doing so. **When this is disabled, neither message opens nor clicks on links will be tracked, stored, or reported on.** It will also disable analytics tracking parameter injection, social network tag injection, and takes effect immediately, even affecting mailshots you have already sent.

Subscribers that did not give consent for tracking when signing up, and visitors with "Do Not Track" set in their browser preferences, will not be tracked even if this tracking setting is enabled.

☒ Enable user tracking

Save settings

Analytics Parameters

Analytics systems such as [Matomo](#), [Fathom](#), and Google Analytics help you to connect your email marketing activity with your bottom line – find out how many sales your mailshots generate and much more. If you enable analytics we will automatically add **utm_** URL parameters when users click on your links so you can connect email marketing activities to specific mailshots without you having to manage those elements in your templates. These parameters tell the destination site:

- That the link came from an email message (**utm_medium**)
- That it was sent from Smartmessages.net (**utm_source**)
- The name of the mailshot the link was in (**utm_campaign**)
- The id of the mailshot the link was in (**utm_content**)

These parameters do not provide any connection between an individual subscriber and the link, and does not expose any personal data. Note that *you must enable user tracking for this to work* – without that enabled, there are no redirects to add parameters to.

☐ Enable Analytics ⓘ

Analytics Domains ⓘ

Save settings

This means that you get user activity reports if the user has given consent to be tracked otherwise their tracking is anonymous and thus the report will not have their data but

With no tracking, there are no redirects from links, so the links go straight to their web destination when clicked thus making for simpler links, helping with spam filters and a slightly quicker response time and there is no ambiguity on consent for tracking.

Below is a matrix showing the tracking status and the effects:

Account tracking setting	Subscriber tracking consent	Effect
On	On	Fully tracked and identified
On	Off	Anonymously tracked
Off	On	Completely untracked
Off	Off	Completely untracked

When Do Not Track is included then the matrix expands. DNT is a setting in certain browsers which gives the obvious request to not be tracked:

Account tracking setting	Subscriber tracking consent	Do not Track	Effect
On	On	On	Anonymously tracked
On	On	Off	Fully tracked and identified
On	Off	On	Anonymously tracked (externally verifiable)
On	Off	Off	Anonymously tracked (externally verifiable)
Off	On	On	Completely untracked
Off	On	Off	Completely untracked
Off	Off	On	Completely untracked
Off	Off	Off	Completely untracked

Analytics

Analytics lets you track what people do on your web site, what they look at, what they do and where they came from. You can use this to extract complete end-to-end return on investment reports on all your marketing channels.

Enter the domains you want to add link tracking to e.g. 'example.com', one per line. Links to domains listed here will have Google analytics parameters added to all their clickable URLs dynamically, so you'll be able to see which of your visitors came from us, and which mailshots.

If you don't specify any, no tracking parameters will be added for any domain. It's up to you to implement the tracking code on the pages the links go to. **Note** that this is entirely independent of Smartmessages' built-in link tracking.

Domain Authentication

To combat the flood of spam and phishing emails, ISPs use authentication technologies to prove that messages are really from who they say they are from (using SPF) and have not been tampered with in transit (using DKIM).

SPF & DKIM can improve your deliverability, we prioritise clients who have set these up. Many large ISPs such as Google, Yahoo and Hotmail take this very seriously. Without these measures, your messages may arrive slowly or not at all, especially with Yahoo! addresses.

Domain Authentication

Authenticating your domains by adding [SPF](#) and [DKIM](#) records to your [DNS](#) as [described in our help pages](#) can help get your email delivered more quickly and reliably to the inbox, and help your customers build confidence in your messages.

Add domain [?](#)

[+ Add](#)

Domain authentication report

Domain	SPF	DKIM	Key size ?	Action
smartmessages.net	✓	✓	2048	Delete

Click the 'Recheck all' button to retest all your domains to see if their SPF or DKIM status has changed, for example if you have updated your DNS. DNS changes can take a while to become visible, and just because they are visible to you doesn't necessarily mean we can see them yet.

Make sure that you recheck any failing domains before sending – any domains marked as failing will not use authentication, which may adversely affect your deliverability.

[Recheck all](#)

Enter a domain that you send from, so if you send from newsletter@example.com, enter example.com and not www.example.com. This needs to be done for each domain that you use in a from address – so if you use newsletter@example.com and newsletter@example.net, you would need to set up both example.com and example.net. For more details of how to set up SPF and DKIM, refer to our help pages.

Account Branding

Your subscribers may visit pages that we host, typically subscribe, unsubscribe and landing pages. In order to maintain branding consistency, these pages can be branded with your corporate identity,

Account Branding, Style & Content

You can change the appearance of some public-facing Smartmessages pages and some of our standard email templates using these boxes, branding them with your own styles, logos, fonts and colours rather than ours. [Read more about branding your account.](#)

Your logo

SMARTMESSAGES

Remove

Choose File no file selected

Colours and fonts

Foreground colour ⓘ

606060

Background colour ⓘ

f9f0dd

Heading font stack ⓘ Presets ✓

'Helvetica Neue', Helvetica, System default, Arial/Helvetica, Futura/Trebuchet, Times, Georgia, Lucida monospace

Body font stack ⓘ Presets

'Helvetica Neue', Helvetica, Lucida monospace

Branding content and style

HTML header

Appears at the top of subscriber-facing pages, such as subscribe and unsubscribe.

Source, Copy, Paste, Undo, Redo, Bold, Italic, Underline, Strikethrough, Text color, Background color, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, Table, Table of contents, Styles, Format, Font, Size, A, A, ?

Basic Colors

Basic Colors	Saved Colors	Advanced
white		
red		
orange		
yellow		
green		
blue		
purple		
black		

These optional settings may be used for both p sheets.

Email cannot use dynamically downloaded font the user's device. If you need help picking a font this one.

giving a consistent and professional styling to their interactions with you.

The same header and footer are used on all of these pages, so don't add page-specific text to them, for example don't put 'sorry to see you go' in your header, because it will also appear on your subscribe pages!

For these pages you can specify a header, footer and override style sheet under the branding tab. You can think of these pages as being constructed like a sandwich, with the header and footer being placed above and below the body of each page. We retain control of the page bodies because they have numerous legal and technical requirements.

Settings
Branding
Statistics
Buy Smartmessages Services
Affiliates

Account Branding, Style & Content


You can change the appearance of some public-facing Smartmessages pages and some of our standard email templates using these boxes, branding them with your own styles, logos, fonts and colours rather than ours. [Read more about branding your account.](#)

[View a branding test page](#)

Your account has a parent that you can copy branding from, but it will overwrite anything you've already entered here.

[Copy branding from Chiasma Data](#)

Your logo



Upload a logo image and we will use it to brand your subscribers' notification messages and PDF reports. Uploaded images should be PNG, JPEG or GIF format which will be converted to PNG (preserving transparency) and scaled to fit into 256x128 pixels. You should ensure your logo is readable on a light-coloured background.

Remove
Choose File no file selected

Colours and fonts

Foreground colour

404040

Background colour

#ffffff

Heading font stack

georgia "times new roman" times serif

These optional settings may be used for both pages and email templates, and take precedence over their respective style sheets.

Email cannot use dynamically downloaded fonts like web pages can, but you can make use of fonts that may be installed on the user's device. If you need help picking a font stack for your favourite font, there are many sites that can help you, such as [this one](#).

Your Logo

Upload a logo image and we will use it on your public pages, subscribers' notification messages and PDF reports. Uploaded images should be PNG, JPEG or GIF format which will be converted to PNG (preserving transparency) and scaled to fit into 256x128 pixels. You should ensure your logo is readable on a light-coloured background.

Your Styling

Use the company colours and type faces so that your recipients see your branding consistently displayed. As you can see the default settings work really well but this adds another level of personalisation across your emails and landing pages.

Email branding

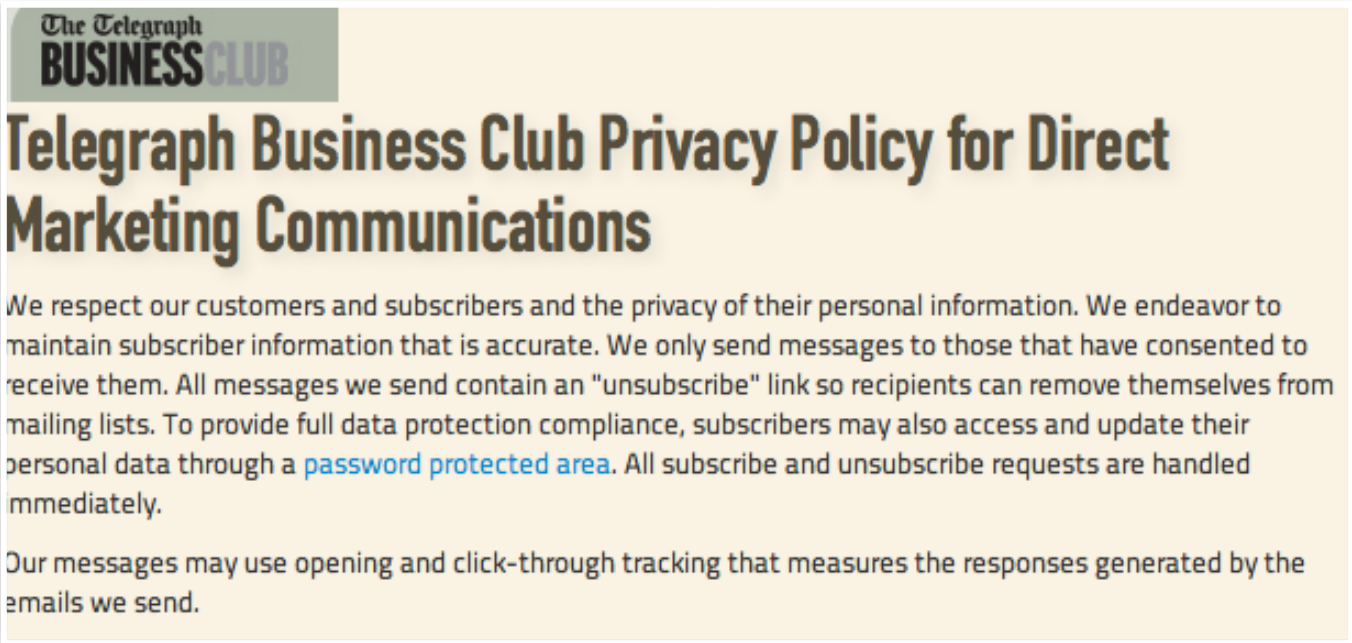
Our standard email templates (e.g. "Headed note") can be restyled in much the same way as web pages – provide a header, footer and style sheets and we'll use them in our standard email templates.

These are not used on custom templates, but you can pull them in using template tags in the template editor, which may help make your templates simpler and more consistent.

Remember to fill out your company details in your account settings as they are used in these templates. Our standard templates and also ones created in the template area can use your settings to ensure consistency on all mailings and also give you a library of ready-branded templates.

Privacy Policy

You can stick with our standard privacy policy which will display as a default if there is a privacy link or you can add your own to our system or point at your own policy on your web site. As email systems are different from web sites, it is worth a look at our policy to check that you have a comprehensive policy for both.

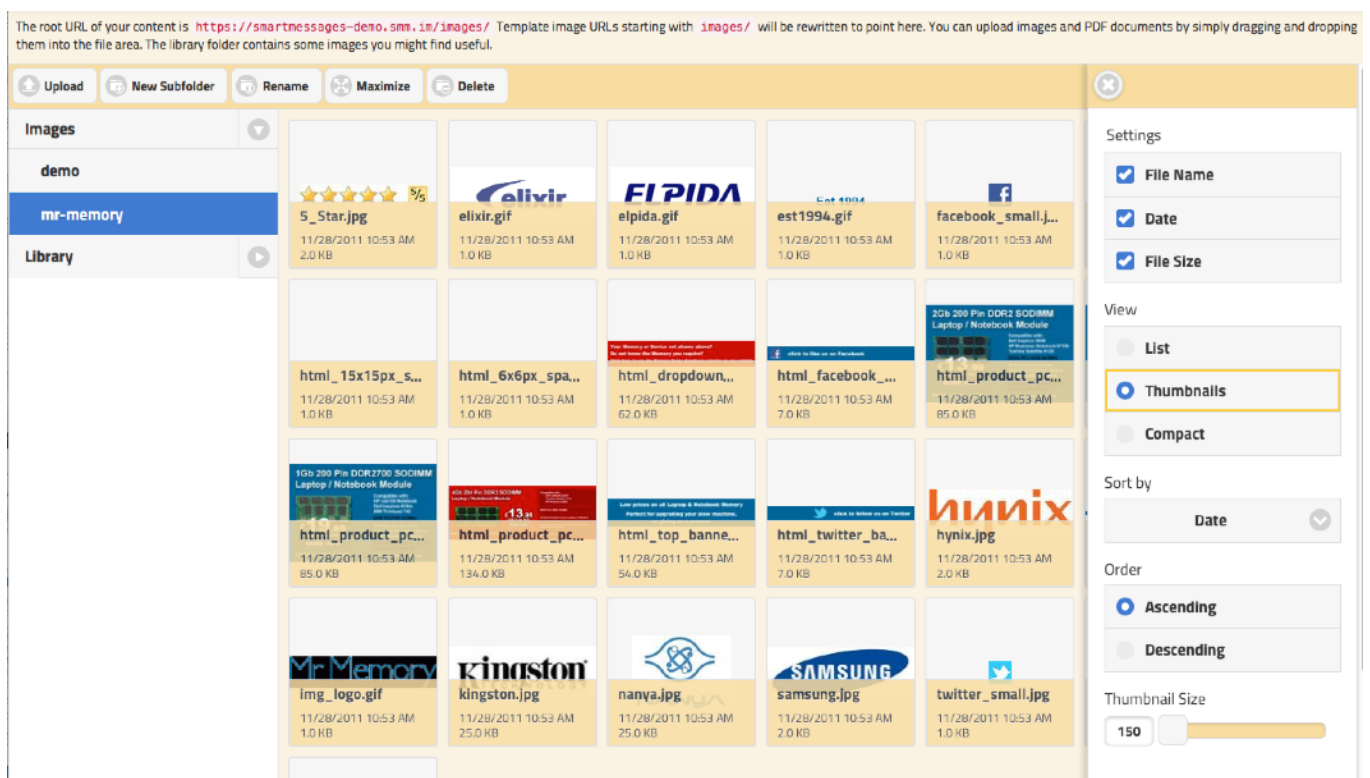


The screenshot displays a privacy policy document for 'The Telegraph Business Club'. At the top left is the logo, which consists of 'The Telegraph' in a small serif font above 'BUSINESSCLUB' in a larger, bold, sans-serif font. The main title of the document is 'Telegraph Business Club Privacy Policy for Direct Marketing Communications', rendered in a large, bold, dark serif font. Below the title, the first paragraph states: 'We respect our customers and subscribers and the privacy of their personal information. We endeavor to maintain subscriber information that is accurate. We only send messages to those that have consented to receive them. All messages we send contain an "unsubscribe" link so recipients can remove themselves from mailing lists. To provide full data protection compliance, subscribers may also access and update their personal data through a password protected area. All subscribe and unsubscribe requests are handled immediately.' The second paragraph reads: 'Our messages may use opening and click-through tracking that measures the responses generated by the emails we send.'

Images and files

Smartmessages includes image hosting for all the images you use in your templates. You can upload JPEG, GIF and PNG image formats, and also PDF documents. You can upload them to us manually, or automatically if you upload a zip file with html and images or by clicking the import images under the html editor window in the template module. You'll find your imported images under the files tab.

To import images, click the "upload" button, select one or more images on your computer, and it will start uploading automatically. You can also drag and drop images from your computer directly into the file area on this page.



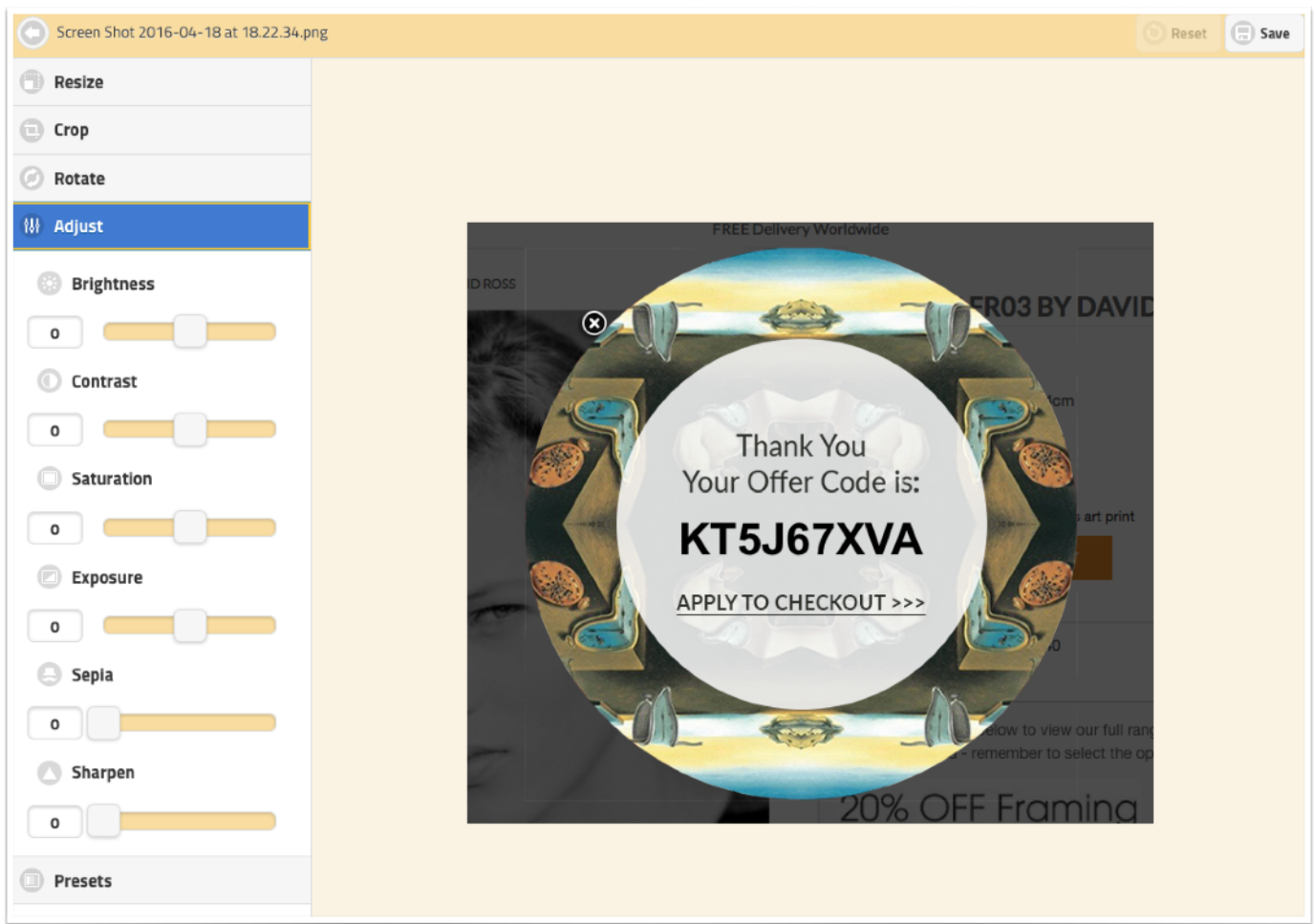
While you can upload files containing spaces in their names, we recommend you don't as it makes their resulting URLs much more complex.

At the bottom of the page you'll find the root URL of your content area which you'll need to refer to images you have uploaded from your templates and branding. In the example pictured you'll see a green arrow image called `arrowr.png`; combining that filename with the root URL gives a complete URL of <https://www.smartmessages.net/content/smartmessages/images/arrowr.png>.

You can create folders to keep your files tidy and manageable, and use drag and drop to move files between them. You'll need to add the folder name to the end of the root URL to target the images within them.

When editing a mailshot, you'll see the same file manager when you click the "insert image" button.

Clicking one of the function buttons or right-clicking an image will show a menu of additional functions. You can upload, view, download, edit, copy, move, rename or delete your files.

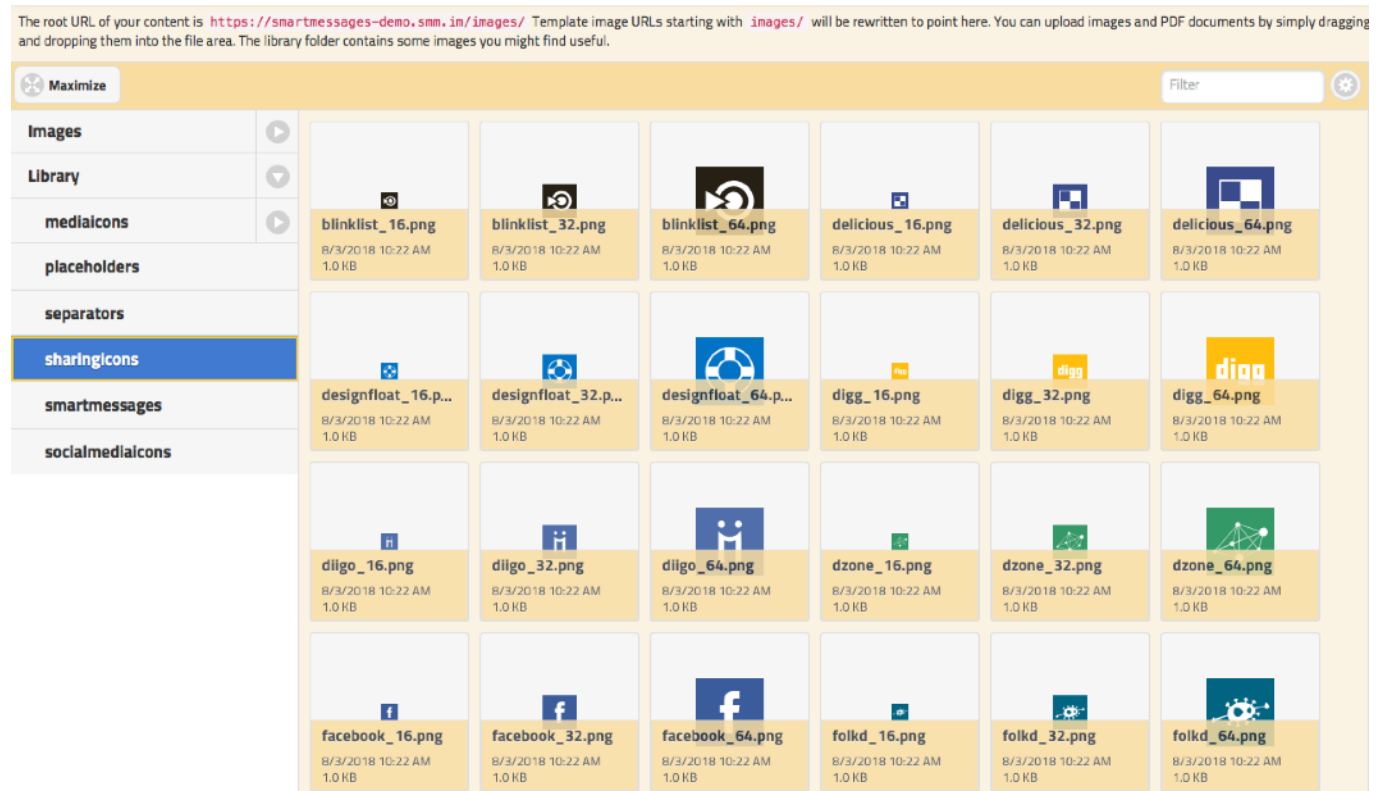


Under the edit feature, you can resize, crop, rotate, adjust the image such as brightness, contract, etc. There are also presets that can be applied to the image.

Warning –If you upload a new version of an existing graphic, bear in mind that your subscribers may not see it immediately because it can be cached by their web browser or email client. The solution for this is to use a different name and adjust your template to match. This is why we recommend creating sub-folders to minimise the chance of using the same name for an image.

The Image Library

We have created a library of high quality basic artwork for use in emails, covering social media icons, separator lines, media type icons, and so on.



Serving images securely

Like everything else on Smartmessages, the images you upload here are accessible using secure TLS encryption (HTTPS), and you'll need to use secure URLs for any images that you use in your header and footer since most of the branded pages are also served over TLS. If you link to any images on your own site (for example a logo), you should also use encryption in order to avoid security warnings or missing images in browsers. We don't provide any support for unencrypted connections – they will always be redirected to their secure equivalents.

PDF Uploads

PDF documents can be uploaded so that they can be linked to from an email. This is the best way of providing a PDF as only the people who want it need to download it, rather than wasting capacity sending it to everyone, and it's also more likely to trigger spam filters.

Contacts and Mailing Lists

You'll find all your lists and contacts under the contacts tab. Under "Contact management" you'll also see statistics about the number of people your account knows about, along with unsubscribes, bounces, spam reporters, all of which you can download.

Your test list

One of your lists can be designated as a test list. Your test list is a bit special:

- It's limited to 16 subscribers.
- It's selected automatically when creating a new mailshot to reduce the chances of sending to the wrong list.
- Your test list cannot be deleted.
- Mailings to test lists get higher sending priority and they have no cancellation grace period, so you'll receive tests faster.
- When you click the "Send a test" button when editing a mailshot, it automatically sends a mailshot to your test list without you having to stop editing.

Click on the manage button to work with a list. You can download all your data on a per list basis, upload lists, and perform list management tasks, such removing inactive users.

Mailing lists

Contact management

four contacts subscribe to your mailing lists according to what they want to receive from you. Contacts can appear in one or more lists, but we only store their information once for consistency.

Highlighted lists are visible on [your landing page](#)

You can build your lists in several ways:

- Provide links to [your online registration form](#) from your website.
- Offer quick signup links for individual lists on your website (under "Signup links" below)
- Upload your existing list into one of your mailing lists (Click "Manage" below)

Mailing list	Description	Subscribers	Signup links ⁱ	Action
Main List	This is our regular newsletter which is about our service, email marketing and the industry.	319	Link	Manage Delete
Account Signups		157	Link	Manage Delete
Andrew Test list		2	Link	Manage Delete
BT test list		1	Link	Manage Delete
ChimpTest Up		2	Link	Manage Delete
M test 2		6	Link	Manage Delete
Marcus test Test list		6	Link	Manage
Smartmessages News		401	Link	Manage Delete
Smartmessages News active	Copy of Smartmessages News, active subscribers only.	104	Link	Manage Delete
Sprockets		2	Link	Manage Delete
Synchromedia		91	Link	Manage Delete
upload test		5	Link	Manage Delete

[+ Add mailing list](#)

Contact Management Overview

Smartmessages accounts are controlled by email credits, either monthly credits or yearly credits. You'll find a breakdown of how the contacts in your account are used under the "Contact management" tab. This count includes:

- Subscribers to mailing lists
- Addresses that have bounced
- Addresses that have unsubscribed
- Addresses that have reported spam
- Addresses that you have suppressed manually (e.g. if they asked to be removed from lists via phone)
- Account administrators

It's possible that some of your contacts don't fall into any of these categories (for example if you upload a list and then immediately delete it), and you can delete them from your account by clicking the 'remove unused contacts' button.

Mailing lists
Contact management

Account status: OK
 You are using 12,635 contacts out of your account allowance of 20,000. [i](#)

Account allowance	20,000	
Active contacts	9,898	i
Unused contacts	8	✕ Remove unused contacts i
Account unsubscribes	345	Download i
Bouncers	2,037	Download i
Spam reporters	143	Download i
Total contacts	12,635	Download
Unsubscribe mode	Global	i
Get contact info	<input type="text" value="Email address"/> Get info i	
Suppress address	<input type="text" value="Email address"/> ✕ Suppress i	

It's important that the bouncers/unsubscribers/spam-reporters are kept since they are used to suppress addresses when you upload a list, since it's a legal requirement to maintain the preferences of your subscribers, and persisting in using bouncing addresses may cause deliverability problems for the rest of your lists.

One feature of Smartmessages is that we share bounce information across all our customers – so if an address hard-bounces for one customer, that information will be used to suppress across all customers. This means you can improve the quality of your list just by uploading it to us, without sending anything!

Unsubscribe mode

The Unsubscribe mode determines how we handle unsubscribe requests:

- When it's **per-list**, unsubscribe requests and suppressions are handled separately for each list, so if someone is subscribed to two lists and they unsubscribe from one of them, they are only removed from that list, and only prevented from being uploaded to that single list in future; any other subscriptions are left untouched.
- When it's **global**, unsubscribe requests are applied account-wide. If someone is subscribed to two lists and they unsubscribe from one of them, they are unsubscribed from all lists and prevented from being uploaded to any list in future.

The unsubscribe mode is global by default, and permission management is kept simple by this approach. We control this setting and can turn it off on request, however we will only do so if you can demonstrate that you are handling your unsubscribes externally in a satisfactory way since it has large implications for your own data-handling infrastructure and processes.

Online Registration Form

We provide a straightforward landing page that allows your subscribers to see (a requirement for UK data protection act and EU legislation compliance) and edit their personal data, and also control all their subscriptions together. The same form can be used for data capture for new subscribers. If you've set up your account branding, your header, footer and styles will be used on this page.

Lists that can be seen by the public, which you can see here on the registration form in the box titled "What would you like us to send you?", are shown in bold on your contacts page where their visibility can be toggled on and off. The mailing list name and description set on the mailing list page are used here (see below).

Many of our customers want to use their own web forms to submit information to our subscription processor, and that's also easy to do – full technical details and examples are on our help pages on the Smartmessages web site.

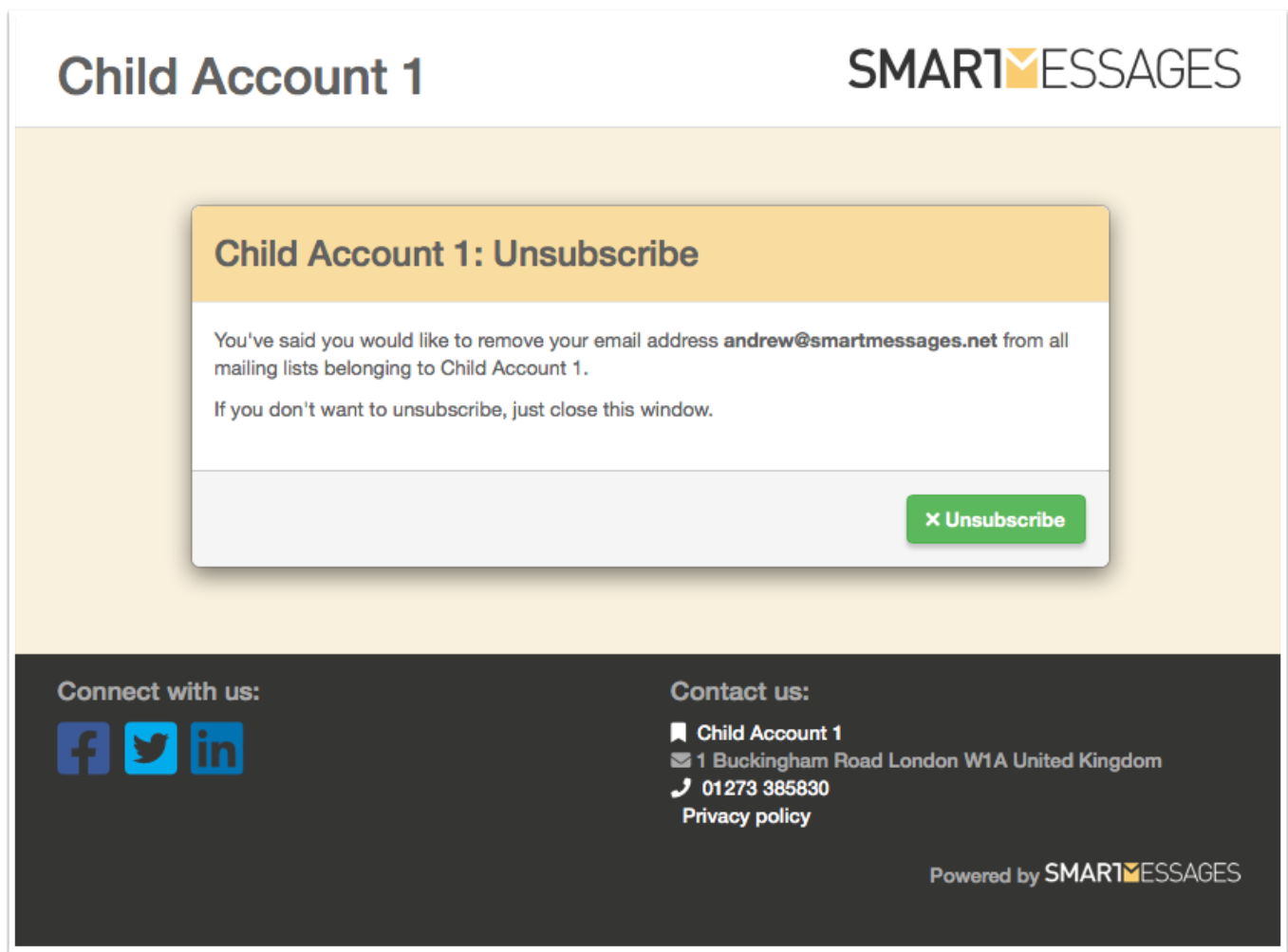
The screenshot shows the 'SMARTMESSAGES Preference Centre' registration form. At the top, it asks 'What would you like us to send you?' with a checkbox for 'This is our regular newsletter which is about our service, email marketing and the industry. Newsletter'. Below this is a 'Save subscription options' button. A 'Double-opt-in policy' section explains the verification process. The 'Your details' section contains two columns of form fields: Email address, Title (Mr, Mrs, etc), First name, Last name, Preferred greeting, Company / Organisation, Job title, Phone number, Mobile number, Address 1, Address 2, Address 3, Post town or city, County, Post code, Country (dropdown), and Home page URL. There is a 'Save changes' button at the bottom of the form fields. A 'Data protection notice' section follows, detailing the use of data and the company's commitment to privacy. At the bottom, there are social media links (Facebook, Twitter, Google+, LinkedIn) and contact information for Smartmessages, including an email address, physical address, phone number, and company number. The footer indicates the page is powered by SMARTMESSAGES.

Unsubscribe Options

There are several ways that unsubscribe requests can be handled, in order of complexity:

- A link to our standard unsubscribe page (generated and inserted automatically in templates)
- The online registration form mentioned above.
- Via your own custom form that uses our standard unsubscribe processor
- Via your own custom form that uses our API.

See our help pages for technical details. <https://wiki.smartmessages.net/>



Mailing List Information

From the contacts page you can see the details of any individual mailing list by clicking the 'manage' button next to it.

Mailing list "Main List"

List info
Subscribers
Actions
Upload history

List ID ⓘ

Public name ⓘ

[UK+ROW] splitlist5

Internal name ⓘ

[UK+ROW] splitlist5

Description

Updated Tues 15.07.14

☐ **Visible** ⓘ

☐ **This is my test list** ⓘ

✓ Save changes

Recent mailshots to this list

Mailshot	Date	Count	Opens	Clicks
Weekly Mailout [DO NOT DELETE] Mailshot 15 Jul 2014	Tue, Jul 15 2014, 20:30	41,684	13,776	5,230
Weekly Mailout [DO NOT DELETE] Mailshot 11 Jul 2014	Fri, Jul 11 2014, 18:45	41,526	8,971	1,146
Weekly Mailout [DO NOT DELETE] Mailshot 9 Jul 2014	Wed, Jul 9 2014, 19:00	41,528	125,906	2,988

List statistics

	Total	This week	This month
Subscribers	41604	0	41,604
Unsubscribes		1	274
Churn rate ⓘ		0.00%	0.66%
Growth rate ⓘ		-0.00%	99.34%
Bounces		0	48
Verified subscribers ⓘ	0 (0.0%)		
Unverified subscribers ⓘ	0 (0.0%)		
List size limit	No limit		
Last upload	July 15, 2014 at 13:51		
Upload count	120		
Completed mailshots	120		
List last used	July 15, 2014 at 20:40		

Size history

List Names

Your lists can have two names, one for the public to see and the other for internal identification. You can also add a description to help identify the purpose of the list, which is also visible to the public.

Visibility

Choose whether the list is visible to the recipients or not on the online registration form. The name of the list will be visible to your subscribers as well as the description.

The list ID and Sign up page give you the details needed to create a subscription form different from the standard form.

Test List

Use this check box to select this list as your test list. See above for what makes test lists special. Test lists are limited to 16 subscribers.

Recent Mailshots

This gives a quick overview of your past mailings to this specific list.

List Statistics

This covers the key information for the changes of the list such as unsubscribes, subscribes and bounces.

List Size History

The graph shows you how your list has changed in size over time. List of Subscribers

Viewing your list of subscribers

You can page through the list of subscribers on your list. Using the search feature, individuals can be found in an instant. Their details can be viewed and edited and they can be unsubscribed from the list.

Subscription Data

Find out key data about each contact, date of subscription, dates of mailings, view on what machine, with the IP address and confirmation of subscription.

Edit Contact Details

Click on edit and you can see and change any contact details you wish.

Personal details such as name, title address, custom fields and also subscription data is shown, this is very useful when an individual wants to know how they got on to list, what they have been sent, when they unsubscribed, and which lists they are currently on.

Mailing list "Demo Mailing List"

[List info](#)
[Subscribers](#)
[Actions](#)
[Upload history](#)

[Search](#)
First Previous 1 of 1 Next Last

Subscriber	Name	Date added	Verified	Tracking	Action
		Dec 12, 2019 18:39	✓	✗	Subscription Edit Unsubscribe
	Andrew Mann	Dec 12, 2019 18:44	✓	✓	Subscription Edit Unsubscribe
	Andrew Mann	Dec 12, 2019 18:44	✓	✗	Subscription Edit Unsubscribe
		Feb 24, 2020 11:16	✓	✗	Subscription Edit Unsubscribe

andrew@smartmessages.net's subscription to "Marcus test"

[Return to mailing list](#)
[Edit subscriber data](#)

This information is mostly technical, but may help you diagnose problems that your recipients report, and can also be used to establish the origin, history and verification status of a subscription for data protection compliance. IP and agent strings are captured on individual signups, but not list uploads.

Subscription information

Subscription type	Unlimited
Subscribed on	November 29, 2012 at 14:22
Subscription verified	Yes
Sign-up IP address	
User agent string	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_0_4) AppleWebKit/536.30.1 (KHTML, like Gecko) Version/6.0.5 Safari/536.30.1

Mailing history

This subscriber has been sent these mails/ots from this mailing list:

Mails/ot	Sent
New system test Copy	July 18, 2014
Send time test Copy 4	June 19, 2014
New system first test	June 15, 2014
Summer 2014 test 2	June 12, 2014
Summer 2014 test	June 11, 2014
Post-upgrade test Copy	March 21, 2014
Post-upgrade test	March 19, 2014
Tests Mails/ot 24 Dec 2013 Copy 2	December 24, 2013

You can unsubscribe a contact from multiple lists here, but note that subscribing via this route will result in double-opt-in messages being sent to the subscriber.

Download lists

Individual list downloads

Download your list with a choice of verified or all the addresses and if you want a list of all your bouncing addresses.

To download all lists for the account, go to Contact Management page under contacts (All the sending addresses, the unsubscribes, the bounces and spam).

The screenshot shows the 'Mailing list "Main List"' interface. At the top, there are tabs for 'List info', 'Subscribers', 'Actions', and 'Upload history'. Below these are buttons for 'Downloads', '+ Add subscriber', '+ Add several subscribers', 'Upload list', '+ Signup form', 'Apply suppressions', 'List operations', and 'Empty'. The 'Downloads' button is highlighted. Below the buttons, there are two main sections: 'Download this list' and 'Download bounces'. The 'Download this list' section has a description: 'A CSV-format download of all data of contacts that are currently subscribed to this list.' It includes a checkbox for 'Verified only' and a 'Download list' button. The 'Download bounces' section has a description: 'A CSV download of email addresses of contacts that have caused bounces associated with this list.' and a 'Download bounces' button.

Add Subscribers

Add individual contacts to your list and also lists of contacts with a copy & paste. Note that how these work varies slightly, and may require users to respond to opt-in confirmation messages.

The screenshot shows the 'Mailing list "Main List"' interface with the 'Add a subscriber' button highlighted. Below the buttons, there is a section titled 'Add a subscriber' with the description: 'This action adds a single subscriber to this mailing list, as if the subscriber had submitted a subscription request themselves.' A pink warning box states: 'Your account has a double-opt-in subscription policy so the subscriber will receive a verification message to which they must respond before they will be added to your list. They will not be visible in the list until they have done so.' Below the warning box, there is a form with a label 'Email address' and a text input field containing 'Email address'. At the bottom of the form is a green '+ Subscribe' button.

Uploading lists

Preparing your list for import

Small lists with just emails and names can be pasted straight in to the simple importer. Bigger lists with more contact information need to use the full import process, full details below.

Your data is better to be in the right import format, so please read the notes on our upload format linked from the "Upload " action tab on any mailing list's page.

Having said that the importer will automatically look at the titles of each column and check the right order, or re-order to simplify the process.

Mailing list "Main List"

[List info](#)
[Subscribers](#)
[Actions](#)
[Upload history](#)

[Downloads](#)
[+ Add subscriber](#)
[+ Add several subscribers](#)
[Upload list](#)
[+ Signup form](#)
[× Apply suppressions](#)
[List operations](#)
[× Empty](#)

Upload a mailing list

Use this form to upload a list of subscribers complete with personal data fields such as name, address, phone numbers etc.

You can get a detailed [technical spec](#) of the CSV upload format we use, or [download an empty file](#) to use as a starting point – it's easy to create from a database, spreadsheet or text editor.

If you just want to upload a few subscribers, you may find the [add several subscribers](#) action quicker and easier.

Uploads do not happen immediately – they are queued for import, so keep an eye on the import progress in the [upload history](#) tab. If you schedule a mailshot using this list before the upload has completed, the mailshot will wait for it to finish before sending.

Though your account has a double-opt-in subscription policy, this subscription method will NOT trigger verification emails. While this is convenient, you will then lack that security should you be required to audit your mailing lists.

We would like to remind you that our [terms of service](#) stipulate that you may only add subscribers from verifiable double-opt-in sources, so you need to be able to tell us where, how and by what means every subscriber ended up on your list. **If you can't guarantee that, don't upload the list.**

Source ⓘ

☐ Overwrite existing data ⓘ
☐ Replace existing list ⓘ
☐ First line contains field names ⓘ

CSV file to upload

[Choose File](#) no file selected

[Upload](#)

We use the standard 'CSV' (Comma Separated Values) plain-text data interchange format for list imports. This is easily exported from programs like Microsoft Excel, Apple Numbers, and MySQL, as well as other email services such as MailChimp (see our other notes for MailChimp compatibility).

There are two ways to get your list in the correct format for an upload.

1. Download the file format example which is found the mailing list actions window. You can provide any subset of the fields listed on the first line, so long as you include 'emailaddress' and remember to check the 'field names on first line' checkbox on import.
2. Go to the account tab, then the settings tab, and you can set a default field import order.

Either set your own field import order (under the Account tab, at the bottom of the setting page) or go to the contact list you wish to upload to, click on the "Manage" button

Now go to the "Upload a list" tab, choose your list file, if you have downloaded the empty file with the default field format then check the "First line contains field names" checkbox, (this refers to the column names (first name, last name, email address, etc) which can be seen at the top of each column in a spreadsheet (like Excel), this data is not a recipient and therefore needs to be disregarded on upload and finally click the "Upload" button.

Simple list importer

This is a simplified importer that allows you to simply paste in a list of email addresses and names.

1. Click the 'Contacts' tab.
2. Click the 'Manage' button next to the list you want to import into.
3. Click the 'Actions' tab.
4. Click the 'Add several subscribers' tab.
5. Paste or type in email addresses you want to add, one on each line
6. Click 'Save changes'

You can also specify recipient first and last names as well as addresses in this form, just separate them with commas, like this:

```
bob@example.com,Robert,Sponge  
carol@example.net,Carol,Christmas
```

Full list importer

If your data is ready to import (You might like to know that we support MailChimp's list export format without any modifications), follow this sequence:

1. Click the 'Contacts' tab.
2. Click the 'Manage' button next to the list you want to import into.
3. Click the 'Actions' tab.
4. Click the 'Upload list' tab.
5. Enter a descriptive line for the source of this import, for example "Export from CRM"
6. Select the 'first line contains field names' checkbox
7. Choose the file you want to upload
8. Click 'Upload'

Because large lists can take quite a while to import, they do not happen immediately, but are processed in a queue. You can monitor the progress of your upload under the "Upload history" tab, and you'll also find any errors relating to the upload there too (for example if we couldn't read the file you provided).

Signup Forms

The Signup Form tab provides a ready-to-use HTML form that you can copy and paste into your own web pages. This is the simplest way to use your own forms, and there are lots of more useful options

Mailing list "Main List"

[List info](#)
[Subscribers](#)
[Actions](#)
[Upload history](#)

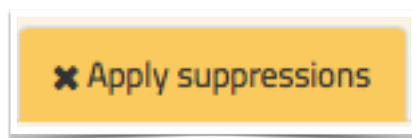
[Downloads](#)
[+ Add subscriber](#)
[+ Add several subscribers](#)
[Upload list](#)
[+ Signup form](#)
[✕ Apply suppressions](#)
[⚙ List operations](#)
[✕ Empty](#)

HTML5 signup form

If you want to build your own custom signup form, here's a minimal working one to get you started, ready for you to copy & paste into your web pages. There are [lots more useful options for signup forms](#).

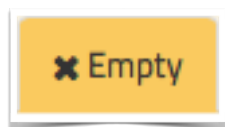
```
<form action="https://www.smartmessages.net/subscribe.php" method="post">
  First name: <input type="text" name="firstname"><br>
  Last name: <input type="text" name="lastname"><br>
  Email address: <input type="email" name="emailaddress"><br>
  <input type="hidden" name="command" value="subscribe">
  <input type="hidden" name="mlid" value="43841">
  <input type="submit" name="Subscribe">
</form>
```

available described on our help pages.



The actions tab on any mailing list has several other options.

The “Apply suppressions” list tab enables you to do a batch unsubscribe from a list, rather than go to each individuals details and click the unsubscribe button. This is useful if you have an existing suppression list you need to apply to your list or account. Note that suppressions are persistent – suppressing an address will mean that they will also be suppressed from any future uploads.



The “Empty” tab allows you to remove all subscribers from a list but keep the list of unsubscribes relating to it, unlike deleting a list which will delete the live list & also the unsubscribes relating to it. Emptying a list does not add suppressions for the deleted subscribers.

List Operations

There are several ways of creating lists using the results of prior mailshots, or applying simple arithmetic to create the list you want. Remember that there is no limit to the number of lists a contact can be on – we still only count each contact against your account limit once.

The screenshot shows the 'Mailing list "Main List"' interface. At the top, there are tabs for 'List info', 'Subscribers', 'Actions', and 'Upload history'. Below these are buttons for 'Downloads', '+ Add subscriber', '+ Add several subscribers', 'Upload list', '+ Signup form', 'x Apply suppressions', 'List operations' (highlighted), and 'x Empty'.

Under the 'List operations' tab, there are five main sections:

- Copy Active:** Create a new list containing subscribers from this list that have generated an open or click event in the last 6 months. Includes a green 'Copy active' button.
- Copy Inactive:** Create a new list containing subscribers from this list that have been sent at least one message in the last 6 months but have **not** generated an open or click event. This will not include new subscribers that have never been sent anything, nor old subscribers that have not been sent anything in the last 6 months. Includes a green 'Copy inactive' button.
- Duplicate list:** This action makes a new list containing the same set of subscribers. When this operation is complete, you will be switched to the new list. Includes a green 'Duplicate list' button.
- Subtract a list:** This action removes all subscribers from this list that appear on the selected list. You can use this to remove overlap between lists. You can't undo this operation! Includes a dropdown menu for 'List to subtract' with 'Account Signups (158)' selected, and a red 'Subtract list' button.
- Add a list:** This action adds all subscribers from the selected list to this list. You can't undo this operation! Includes a dropdown menu for 'List to add' with 'Account Signups (158)' selected, and a green '+ Add list' button.

Duplicate list

As it suggests – this simply duplicates a list, creating a new list containing the same subscribers. After this operation you will be switched to the new list.

Copy active

This creates a new list containing only subscribers that have opened or clicked a message in the last 6 months. Note that this will result in an empty list if you have no tracking enabled.

Copy inactive

This creates a new list containing only subscribers that have not opened or clicked a message in the last 6 months. This will not include new subscribers that have not been sent anything, nor old subscribers that have not been sent anything in the last 6 months. To paraphrase, this will create a list of subscribers that are unresponsive, but only if they have been given a chance to respond.

Subtract a list

This removes subscribers from the current list that also appear on the selected list, removing overlap between lists, which can be useful in trying to avoid sending duplicate messages to the same subscribers.

Add a list

Simply merges two lists, resulting in a list that contains everyone that was on either or both lists, without duplicates.

Templates

Templates are used to determine how a mailshot looks to your subscribers. Their personal info is merged with the template to generate each individual message.

The templates tab is intended for use by those that are familiar with HTML, and always shows you the HTML code so you can see exactly what's going on – if you're a web developer, you'll be at home here. If you're not up to speed on HTML, don't worry about it – you can use a simple word-processor-style editor when sending a mailshot using a standard template, so you don't need to use this page at all.

In either editing location, you can make use of our testing tools to ensure that your template and content looks and works like it should, and we strongly recommend that you do so!

Templates

- Full test
- Link report test
- New Template 19
- New Template 6a
- Newsletter
- Newsletter Summer 2011a
- Phone Call Template
- Preview test
- Question mark subject
- Redline
- Russian test
- SM News Summer 2014
- SM News Summer 2014 orig
- SM newsletter winter 2013

Template properties

Status: **Loaded** Syntax check: **OK**

Settings HTML template Plain-text template

Name SM News Summer 2014

Description

Subject Smartmessages News Summer 2014? Important info

☐ Archived

Preview

Actions: Add Duplicate Delete

Buttons: Show all templates Download zip archive Save Preview

Adding templates

Click the “Add” button to create a new template, then paste in your HTML, click save, and your template is ready to use!

Remember that email is not the web – so HTML4 transitional markup, tables for layout, font tags and no CSS are the order of the day to have it work across most email clients. You can work with regular CSS styles, and then check the inline box so that document styles are converted to inline styles when sending.

Be aware that we apply filtering to templates for security reasons – for example we strip out all scripts, iframes and event attributes. This should not affect normal templates, but be aware that it’s happening.

The open tracking uses an image which is automatically added to an email if it isn’t already there as well as an unsubscribe link. The code can be found in the drop down list of dynamic fields.

The drop down menu which contains the dynamic fields (like shortcodes, if you’re familiar with WordPress) is the key to personalising emails.

Apart from unsubscribe and open tracking codes, the web version link, and all the shortcodes for your account, your list, and subscriber personal data are found here.

Templates

- Full test
- Link report test
- New Template 19
- New Template 6a
- Newsletter
- Newsletter Summer 2011a
- Phone Call Template
- Preview test
- Question mark subject
- Redline
- Russian test
- SM News Summer 2014
- SM News Summer 2014 orig
- SM newsletter winter 2013

Template properties

Status: **Loaded** Syntax check: **OK**

Settings HTML template Plain-text template

Informal greeting (e.g. 'John') Insert field Import HTML from URL...

```
<!-- Inliner Build Version 4388b7741bb759d6cb997545f3add21ad48f010b --><!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Strict//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-strict.dtd">
<html xmlns="http://www.w3.org/1999/xhtml" xmlns="http://www.w3.org/1999/xhtml">
  <head>
    <meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
    <meta name="viewport" content="width=device-width" />
  </head>
  <body style="width: 100% !important; min-width: 100%; -webkit-text-size-adjust: 100%; -ms-text-size-adjust: 100%; color: #222222; font-family: 'Helvetica', 'Arial', sans-serif; font-weight: normal; text-align: left; line-height: 19px; font-size: 14px; background: #faf3e4; margin: 0; padding: 0;" bgcolor="#faf3e4">
    <style>
      a:hover {
        color: #2795b6 !important;
      }
      a:active {
        color: #2795b6 !important;
      }
      a:visited {
        color: #2ba6cb !important;
      }
    </style>
  </body>
</html>
```

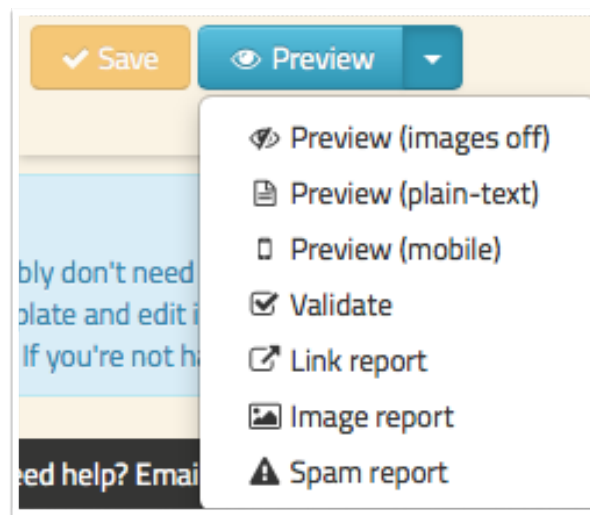
☐ Import images ? ☐ Convert template format ?

Save Preview

Email Tools

There is a collection of tools to help you check that your template is correct, these tools are so simple to use and really make a huge difference to polishing the email by spotting all the little details that need to a tweak.

- Preview how your message will look, with or without images
- Preview how your plain-text message will look.
- Preview how your email will look on a mobile.
- Validate – Checks to see if your HTML passes W3C validation – if your message contains incorrect markup, it's likely to fall apart in less tolerant clients.
- Link Report – this checks all the links in your email for format, validity and that they are working.
- Image Report – a list of all the images in your email and if they are working or incorrectly sized.
- Spam Report – Score your template with the industry-standard SpamAssassin filter to check if it could be considered spam.



Dynamic Content

You can add dynamic fields or macros that will expand when they're sent, and you can see these in the drop down menu. The snippets of code for linking to a web version, tracking openings and unsubscribe link are added automatically if they are not already present when the template is saved.

To add a dynamic field or macro, choose the one you want in the drop down menu, and click the "Insert dynamic field" button and it will appear at the current cursor position in the editor.

To use a custom piece of data such as a discount code which is different for each recipient, follow these points:

- Upload the discount codes using a CSV through the contacts module, ideally the file will contain two fields, the email address and the custom field, this will mean no other data gets touched when uploading. Having uploaded, check a subscriber has some data in the required field.
- There are two places to work on a template, in the template module, add a dynamic field from the drop down on the html page or when working in the mailings module then from the SM tags drop down.
- To check it is working, send a test email - if it looks good then send out to your list.

Most of the dynamic fields are self-explanatory, but two in particular are worth mentioning:

`[[$subscriber.informal_greeting|default:"Reader"]]` and `[[$subscriber.formal_greeting|default:"Reader"]]`. You should use these instead of tags like `[[$subscriber.firstname]]` as they provide additional intelligence when data is missing.

`[[$subscriber.informal_greeting|default:"Reader"]]` tries to use someone's first name, then tries title and surname, then a default value – so a tag of `[[$subscriber.informal_greeting|default:"Subscriber"]]` might output "John", "Mr Smith" or "Subscriber" depending on what data is available for that particular recipient.

`[[$subscriber.formal_greeting|default:"Reader"]]` is similar, but tries the "Mr Smith" variant first. Both forms are overridden by the presence of a "Dear" field which is there for cases when subscribers preferred form of address does not involve their name, such as a nickname ("Stinky Pete") or formal name ("Mr President").

Dynamic Subject

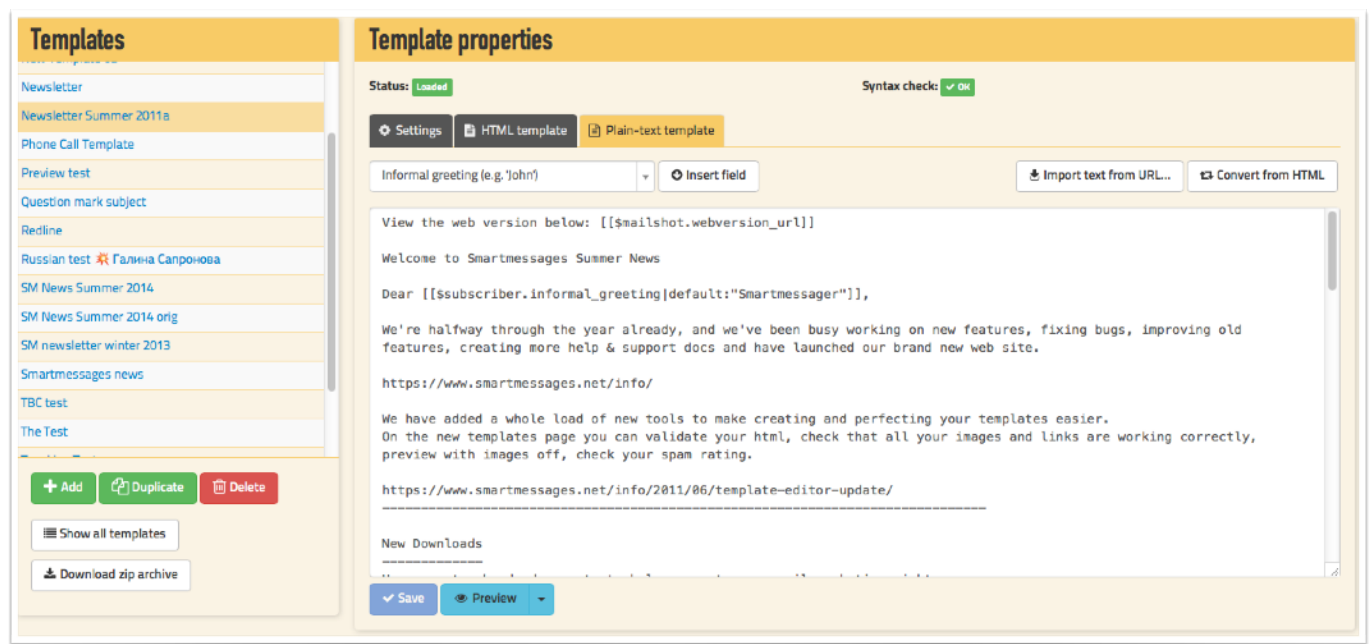
The subject line is also a complete dynamic template – you can use all the same tags as are available in the plain text editor, with the obvious exception of the `[[message.subject]]` tag!

You can also use a whole host of fun unicode characters called emojis, though these will only appear correctly in certain email clients.

Creating a plain text version

Simpler, older email systems, and those used by the deaf or visually impaired can benefit from the availability of a plain-text version of your email, free of the complexity of HTML markup.

A quick start is to use the Convert from HTML template button if you already have an html version saved, then edit it until ready.



You may find it easier to copy the converted version and edit it in your own text editor, then paste it back in when you're finished – but remember to save!

You can do the same with your plain-text version, or you can use the button to create one automatically from your HTML version – we use a full text-based HTML renderer for this operation that's able to preserve (with some limitations) multi-column and table-based layout, not just a dumb tag-stripper!

Have a look at how your plain text version looks by choosing the plain-text preview in the drop down menu.

RSS

RSS stands for “Really Simple Syndication” and is a means of providing stories and articles in a fixed format that’s easy to process. For example, the posts in a blog are usually accessible as an RSS feed.

RSS is a great way of automating email creation – you can just determine your formatting, write an introductory paragraph, then have the bulk of your content pulled from your blog dynamically instead of having to reformat it manually every time.

To include a RSS feed look for the tag in the drop down menu , or just type `[[rss]]` tag to your HTML template where you want the feed to be rendered. This is what is added:

```
[[rss url="http://feeds.bbci.co.uk/news/rss.xml" items="3"]]
[[if $rssitem.first]]<h2 id="rsstitle">The latest from <a href="[[ $rss.url]]">[[ $rss.title]]</a></h2>
[[/if]]
<h3 id="rssitem[[ $rssitem.index]]">[[ $rssitem.title]]</h3>
<div>
    [[ $rssitem.content nofilter]]
    <p><a href="[[ $rssitem.url]]">Read more...</a></p>
    <p><em>Published [[ $rssitem.published|date_format:"%c"]]</em></p>
</div>
[[/rss]]
```

Then edit the RSS snippet source, to determine how each item from your RSS feed is going to look in the email. The snippet is repeated and populated for each story pulled from the RSS feed.

You can create emails which use the different categories from the RSS feed and thus organise the email per subject. See our online examples to see exactly what can be done.

Note that you don’t determine which feed and how many stories are going to be presented until you send a mailshot – this is because the same template can be used to send RSS feeds from any source.

Creating reusable templates

Rather than building a new template from scratch every time you want to send a new mailshot, you can create a shell template and edit content within it without having to touch the template. When you create a mailshot, the template is copied into it, so you can make changes to it in the mailshot without affecting the original template.

Creating a variation on a template

Choose the template and click the duplicate button. Now you can work on the new copy to create a different template or to keep a base version if you are changing things but might want an original to go back to.

Why don't my templates don't look right?

We find that in the vast majority of cases, it's because they contain malformed HTML, for example missing closing tags, incorrect nesting, or just invalid markup like putting one p tag inside another.

We strongly recommend that you use a validation service (like the W3C one we provide) to check that your HTML syntax is right. Beyond that, consider that variation between mail client applications (Outlook, Apple Mail etc) is far greater than between web browsers – it may look OK in your browser, but completely wrong in Outlook or gmail.

There's no substitute for testing in these cases.

Archiving Templates

After you've been using your account for a while, you may find your list of templates gets too long to manage easily – you could take this as a hint to explore our reusable templates, but you can keep things tidy by archiving old templates.

Choose the template in the left hand list, now check the archive button and hit save. The template will now not appear in the template list unless you click "show all". Hiding templates speeds up the template editor & keeps things tidy. Archived templates are also hidden when you're on the send page so they keep that tidy too.

Download Templates

To get a complete copy of all your templates, including the images, then click the Download zip archive – this creates a zip file with a folder structure so that all your emails are easy to deal with when sending mailshots

1. Click the mailings tab and either create a new mailshot or “Copy & edit” an old mailing.
2. Select a template from the drop down menu or by clicking on template gallery and choosing the template you want.
3. Add the new content, it is easier to have already loaded the images, type or copy in the text. You can now check your email with the tools on the drop down menu attached to the preview menu. You can also send a test.
4. Under the Management tab, name the mailshot to help you to identify the mailing later on, and choose the campaign folder you would like to save it in. This lets you organise related mailings into folders (new campaign folders can be created on the mailings page). When creating a new mailshot, the campaign folder will default to your test campaign.
5. Click the Next Step button or click on the “To” tab.
6. Choose who to send it to – either a mailing list or a single email address. When choosing a list, the option for a continuous mailshot appears. This is like an auto responder which will send a message to a recipient when they are subscribed to the list, but will not send anything to existing subscribers.
7. Click the Next Step button or click on the From tab. Add a from name & address. It’s best to use a dedicated email address (e.g. not your general “info@” address) to avoid getting holiday/ autoresponder/maintenance emails and allow subscribers to reply directly to you. The “BCC to me” feature sends you a copy of every email in the mailshot – beware of this as you will receive a message for everyone on your list!
8. Click the Next Step button or click on the Subject tab. Add the email subject here unless it is already included with the template. Remember that subject lines may also be dynamic, and you can use all our template tags in them. There is an option for an A/B split test, more on this below.
9. Click the Next Step button or click on the “When” tab. Schedule it for right now, or a time in the future. When you select “Now”, it actually includes a short grace period of a minute or so to allow you to cancel it in case you scheduled it accidentally.

10. Click the Next Step button or click on the Final Check tab. This is a very important screen because it tells you if you have the details of the mailshot including if the email is correctly written.
11. If you're sure it's all ready to go, click the big blue "Send now" (or "Schedule for sending") button at the bottom of the page.

Always take a moment and clearly read the details of your mailing before sending – you can't "unsend" an email!

Sending Overview

1. Click on the mailings tab. Create a new mailshot in the campaign folder you want to store it in.
2. Select a template. Add your new content. Click 'next step'
3. Name your mailshot. Click 'next step'
4. Enter a subject line. Click 'next step'
5. Select who you want to be the recipients.
6. Click the 'Final Check' tab.
7. Check the details, carefully, this is a critical moment. Click 'Send now'.

After scheduling you will be returned to the mailings page. You may need to refresh the page to see the mailshot's status, i.e. if it's been sent.

Extra Features

A/B Split Tests

Under the subject tab, this feature can be enabled – You will need a list of at least 10k but to make it work it's best then 50k or larger is recommended.

Set the extra subject line and choose the delay before the system chooses the better performing email based on opens.

HTML CSS Inliner

Work on your templates with your css and body sections, click the inliner box and the styles will be inlined as the email is sent.

Continuous Mailshots

Under the To tab, choose a list to send to, then you can also choose a continuous mailing. This will stay active and when contacts added to the list, they will be sent an email. This is very similar to an

Welcome emails (1/1)			
✉ Welcome email on Sign up	Active	AI subscriber list	Sep 17 16:13 324

auto responder.

Testing Emails

It's vital that you test your mailshots. Fortunately our testing tools make this straightforward:

1. Create a test list under contacts, selected the list as your test one, you want the email to be sent to you to check how it looks in email clients. You need to include recipients with emails such as yahoo, google, hotmail, etc.
2. When editing a mailshot, click the "Send a test" button and a test will be sent to your test list and stored in your test campaign folder.
3. Check the emails, both plain-text and html and all the links. (Make use of the link checker in the preview button menu).
4. Make any changes you need to your template.
5. Click "Copy & edit" on the mailings page to create a new copy which is ready to work on.
6. Edit the copy, make any content changes you need and retest until perfect.


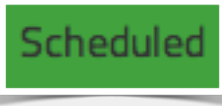

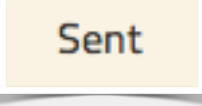

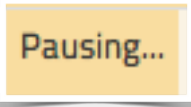

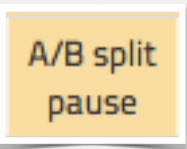
When you're happy with your tests you should only need to change who the real mailshot is sent to; altering other information at this stage is likely to lead to mistakes – if you do want to change things, retest before sending.

When you've got your email perfect:

1. Click the copy & edit button on the mailings page.
2. Choose a name for the mailing, think about this in relation to ongoing mailshots, so it easy to recognise later on.
3. Choose the campaign it will be stored in.
4. Choose the list and send now or schedule the send time.
5. The mailings page needs refreshing to monitor the mailshot status.

Sending Status Indicators

The mailings page shows the state of each of your mailshots. Here is a list of the different states for mailshots:

	After creating a mailshot, the status will be unsent.
	Having created a mailshot and set it to send now or later, the status is set to scheduled.
	When the mailshot is being sent, the “Sending” status is displayed and the number of sent and yet-to-be sent messages are shown.
	When your mailing has been sent, the status is set to sent.
	When the mailing has been set up as a continuous mailshot, the status is shown as “active”. Messages are sent when contacts are added to the list.
	After you ask a mailshot to pause, it can take a little while for all our sending engines to stop, and so it will show as “Pausing...” until it has reached the “Paused” state.
	After a mailshot is paused, you can either stop the send or allow it to continue and complete normally.
	The “A/B split pause” state is when the test portion of a mailshot with an A/B split has been sent and it is waiting for the results back before continuing.

Reminder!

Only send when you have done your tests, checked your links, subject, text, graphics, etc.

When creating your final mailshot, make sure you don't touch any of your content, just the mailshot name, campaign, list and send time. That way you can be sure you're sending what you've tested.

Once an mailshot reaches its appointed send time, it goes out extremely quickly. If you make a mistake, you may be able to pause it, but you will have to be very quick – a mailshot to 1,000

recipients will go out in just a few seconds! The fundamental rule here is only send when you are absolutely sure it is correct. By not testing, mistakes are made, and they are your own responsibility.

Mailshot management

To see a list of your mailshots, click on the mailings tab.

By default, this page shows mailshots sent in the last month. This helps you focus on your current mailings, reduces clutter, and speeds up the display of the page. If you want to see mailshots from further back then choose the number of months or click "all mailings" to see everything.

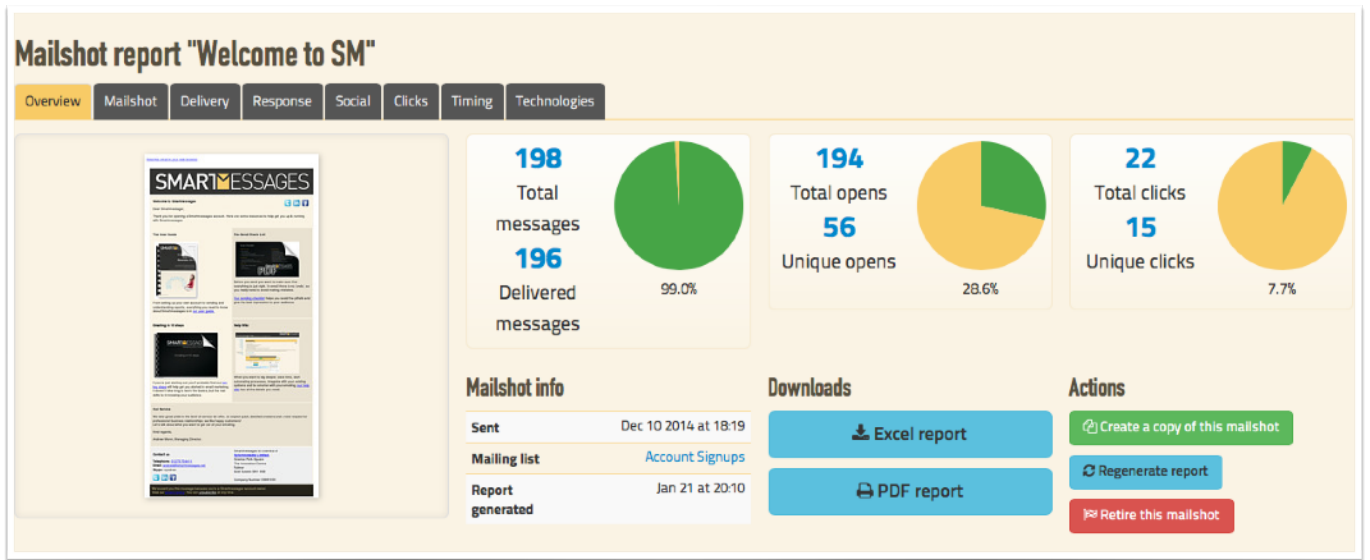
- Campaign folders can be created so that multiple mailshots, including tests, can be neatly managed.
- You can change the names of campaign folders and mailshots by just clicking their names.
- You can delete mailshots and campaigns, but be aware that we can't recover them if you do.
- To delete a campaign, select show all and the delete button will appear - this is so it's clear exactly which mailshots you are deleting. We can disable deletion to protect your data from being deleted by mistake.
- If you do want to delete anything, we suggest you download reports for them first so you have a fixed record.

The screenshot displays the Smartmessages Mailshot management interface. At the top, there are filters for 'Showing mailshots from the last' with options: month, 2 months, 4 months, 6 months, 1 year, and all. Below this, there are campaign folders: Leads, Newsletter, SM Sign Ups, Updates, and Tests. The main table lists mailshots with columns: Name, Status, Sent to, Template, Sent/Completed, Sent/Total, and Actions. The table is organized into sections: Leads (1/10), Newsletter (0/6), SM Sign Ups (1/1), Updates (2/2), and Tests (4/63). Each row shows a mailshot name, its status (e.g., Unsent, Active), the recipient list name, the template used, the date and time sent, and the total number of recipients. Action buttons like 'New mailshot', 'Copy', 'Edit', 'Copy & edit', 'Delete', 'Pause', and 'Report' are available for each mailshot. At the bottom, there is a 'New campaign folder name' field and an 'Add campaign folder' button.

Overlaid on the bottom right is an 'EffectiveMarketing Mailshot Report'. This report provides detailed analytics for a specific mailshot. It includes sections for 'Mailshot info' (Campaign, Status, Subject, From, To, Bcc, Cc, Sent date, Sent time, Completed, Status, Sent by), 'Delivery' (Delivered, Total messages, Messages not yet sent, Bounces, Message opens), 'Response' (Message openings, By unique addresses, Clickthroughs, By unique addresses, Clicks with image off, Estimated images off, Clicks with image on, Estimated images on), and 'Mailshot performance' (Conversion rate, Click rate, Open rate, Reply rate, Bounce rate). A bar chart shows the performance of the mailshot across different stages: Mailshot 1, Mailshot 2, Mailshot 3, Mailshot 4, and Mailshot 5. The chart compares 'Open %' (blue bars) and 'Click %' (red bars) for each stage. The report also includes a 'Smartmessages.net: Powerful Email Marketing' footer and a 'Page 1 of 2' indicator.

- Click on the name of the list in the "sent to" column to visit the list's page under the contacts tab.
- The Sent/Completed column shows you when the mailshot was sent and when it completed.
- Click on a "Copy & edit" button to make a complete replica of a mailshot. This is a key part of the testing process, this avoids mistakes creeping in when multiple changes are done

and not tested.



Reports

Our reports offer a detailed insight into your mailshot's performance after sending but will only include user data when the tracking is switched on under the analytics module. If a recipient hasn't given consent to be tracked then the tracking is anonymous, the same as if they have DNT - Do Not Track switch on in their browser.

View a report by visiting the mailings page, then click the “Report” button next to the mailshot you want to look at. You will see an overview of the mailshot with top-line stats, and you can go to a more detailed view or download an Excel or PDF version of the report.

The large green “Send another mailshot like this one” button lets you clone this mailing, creating a new mailshot with the same settings and content that you can edit before sending. This is the same function as the “Copy & edit” button on the mailings page.

Excel Report

The downloadable Excel report is a complete version of the report, containing all the top-level information about the mailshot.

It is ideal for creating your own reports and using your spreadsheet skills to display the results.

[illegible]

PDF Report

The downloadable PDF is a complete version of the report, ideal for printing, sending to others or presenting in meetings.

If you have uploaded a company logo on the account settings page, the pdf will be branded with your logo.

Mailshot Overview

Here you have the executive summary of the mailshot with the key results. Unique opens & clicks will more than often be 1, which is all the recipients opening & clicking but who have not given consent to be tracked and thus they are all called anonymous. You will also find other parts of the reports with anonymous as the recipient.

Delivery

Here you can see how many messages were delivered.

You can download the bounce list for this mailing, and there is a breakdown of the types of bounces and top bounce domains.

Bounces are removed from the list automatically using an intelligent set of rules, so that emails aren't removed unless it is clear they are no good.



Bounce Report

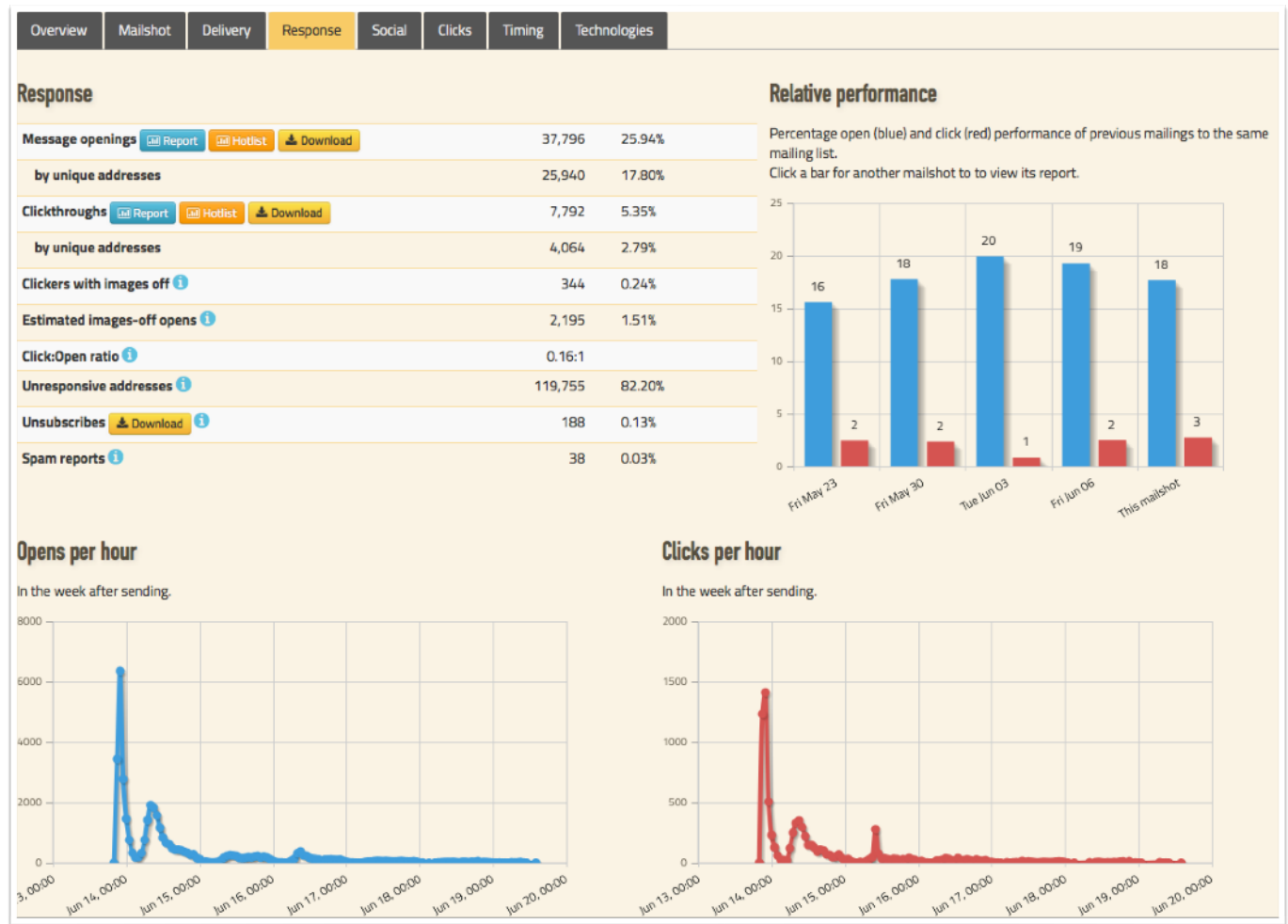
The bounce breakdown contains lots of insightful information about the state of your list, how fresh it is and which email services are rejecting your mailings.

Over time this will automatically be cleaned up by our system as it serves no one to send messages which do make it to a subscriber's inbox.

We expect to see lists with less than 1% bounce rates. The pattern of bouncing gives a clear indication of the history of the list. Such as when it was used or how it was created.

Response

The response panel shows the number of times the email was opened, including recipients that opened it more than once.



The unique addresses shows the number of distinct individuals that opened it who have given consent to be tracked otherwise they are counted as anonymous.

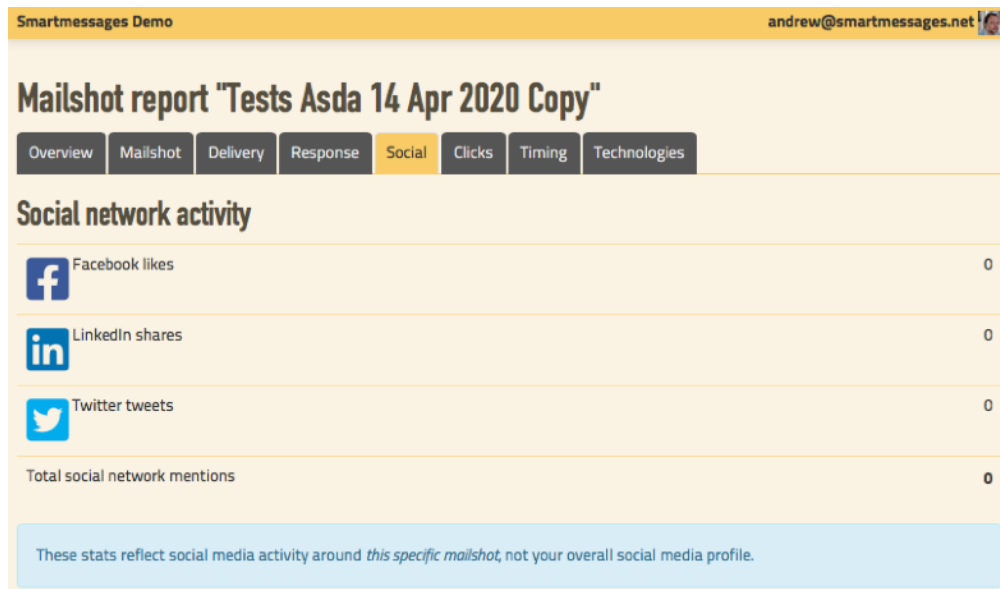
The open:click ratio shows the proportion of recipients that clicked on links in the message having opened it, which is a useful measure of how interested recipients were in your message and what it linked to.

There is a relative performance graph which compares this mailshot to the last four mailings to the same list.

The opens and clicks per hour show you the pattern over time, these are normally pretty similar unless there is a holiday or a late send.

Social Network Report


If your mailshot has been shared on social networks via the sharing buttons we provide, the results will appear here. Note that these relate only to this specific mailshot, not shares done from other sources.

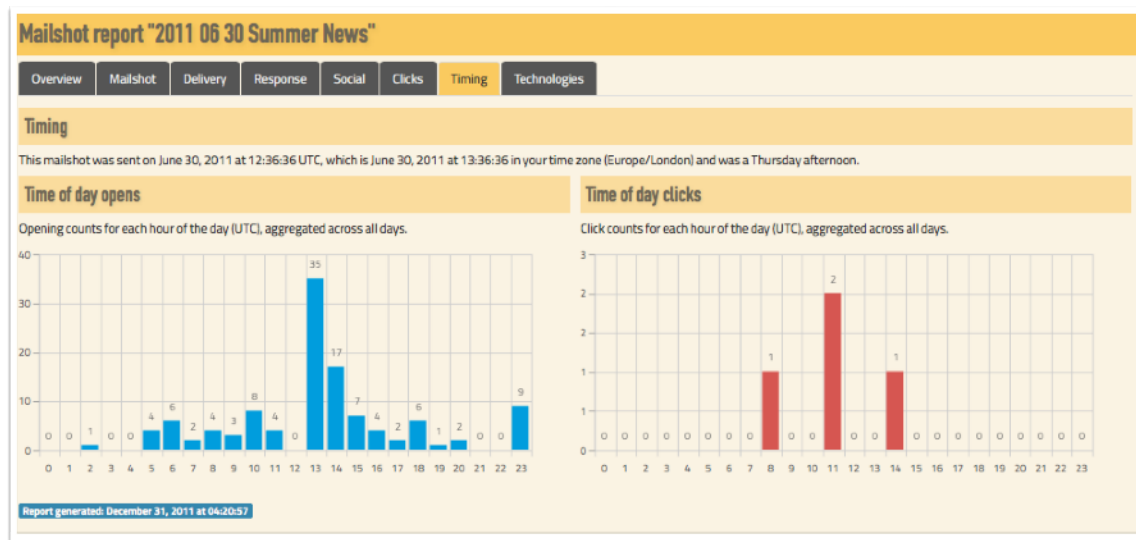


Clickthrough Report

The clickthroughs breakdown shows you the links in this mailshot and how many times they were clicked on. Links with no clicks are not shown. Click a click count to see a list of times and email addresses of those who clicked.

Occasionally links may be corrupted by external systems beyond our control.

Mailshot report "2011 06 30 Summer News"	
Overview	Mailshot
Delivery	Response
Social	Clicks
Timing	Technologies
Clicks	
6 subscribers made a total of total of 10 clicks on this mailshot.	
Click a count to see who clicked through.	
URL 	Clicks
Web version	2
https://www.smartmessages.net/...tmessages%20User%20Guide.pdf	2
https://www.smartmessages.net/info/	1
http://wiki.smartmessages.net/#SPF	1
http://wiki.smartmessages.net/...KIM%20and%20DomainKeys%5D%5D	1
http://www.smartmessages.net/uploads/2011/06/Ckecklist.pdf	1
http://www.smartmessages.net/uploads/2011/06/10Steps.pdf	1
http://www.smartmessages.net	1
Report generated: December 31, 2011 at 04:20:57	



Report Graphs

The timings show the time of day that messages were opened or clicked.

Generally the openings occur fairly soon after the send, but this will also vary according to your audience, time of day, day of the week and time of year.

Technologies

Here you can see which browsers on what computers and the type of computer used to open the email.

All lists have a different profile, one of the key things here is to check that your mailings are designed well to look good on the devices opening the mailshot.



Multiple Account Management

Overview

With a simple two-tier, parent–child account structure, large organisations and digital agencies get a wide range of features to manage Smartmessages services across multiple clients or departments.

Account status: Synchromedia Limited

Hello, Welcome to Smartmessages

Sending credits remaining: 8,000

You have used 2,000 sending credits out of your total of 10,000.

Account activity

Account	Credit balance	Mailshots this month	Messages this month
This account	8,000	0	0
Credit SM	1,000	0	0
Smart Branding	1,000	0	0
Smartmessages	5,995	1	5
Syniah	0	0	0

[Create a new sub-account](#)

[→ See more](#)

Setting up Accounts

New child accounts can be created with a click.

The child accounts appear on the home page of the parent account, helping with navigation and oversight.

User Management

Administrators can add new users and allocate them different levels of access appropriate for their role. They can help reset forgotten passwords and revoke access when needed. There are five different privilege choices:

- Account Admin with user management – can do everything and create users
- Account Admin – can do everything
- Mailing List Admin/DPO – Contact Management but cannot send
- Read only mailing overview – Can only see the reports of mailings
- API-only user – used when connected to other systems.

User access management

Here you can control who has access to this account, and what features they can use. You can also unblock blocked accounts and reset passwords. New users will need to visit the password reset page to set their own password before they can log in.

User	Privileges	Action
andrew@smartmessages.net You	Account admin with user management	Reset password
marcus@smartmessages.net	Account admin with user management	Reset password Revoke access
syndrew@gmail.com	Account admin	Reset password Revoke access

Email address Account admin with user management
Account admin
✓ Mailing list admin / DPO
Read-only mailing overview
API-only user [Add](#)

Account Branding

A parent account's branding can be copied to a child account in one click, thus keeping the styling consistent across an organisation, saving lots of copying and pasting.

Branding controls cover the colour scheme, font stacks, custom headers & footers, and CSS for public-facing pages, such as subscribe and unsubscribe.

The screenshot shows the 'Account Branding, Style & Content' settings page in the Smartmessages dashboard. The top navigation bar includes links for Settings, Branding (active), Statistics, Users, Buy Smartmessages Services, and Affiliates. The main heading is 'Account Branding, Style & Content'. Below it, a text block explains that users can change the appearance of public-facing pages and email templates using these boxes, branding them with their own styles, logos, fonts, and colours. A link 'Read more about branding your account.' is provided. To the right, there are two buttons: 'View a branding test page' and 'Copy branding from Smartmessages'. Below this, a section titled 'Your logo' features a 'Choose File' button and a note that no file is selected. A light blue informational box explains that uploaded logos will be used to brand subscribers' notification messages and PDF reports, and that they should be in PNG or GIF format, scaled to 256x128 pixels, and readable on a light background. The 'Colours and fonts' section follows, with 'Foreground colour' set to #606060 and 'Background colour' set to #f9f0dd. Both have color pickers. Below these are 'Heading font stack' and 'Body font stack', both set to 'Presets' and showing the default stack: 'Helvetica Neue', Helvetica, Arial, sans-serif. A light blue informational box on the right explains that these optional settings may be used for both pages and email templates, take precedence over style sheets, and that email cannot use dynamically downloaded fonts like web pages can, but users can use fonts installed on their device. It also provides a link to a site for help picking a font stack.

Template Features

Templates can be imported from other email marketing systems with a couple of clicks, written from scratch (we don't get in the way of custom template developers), or they can be created from the standard templates.

Our standard templates pull information from the account, such as branding, colours, logos, company contact details, and social media links without needing additional work, so they act as a great starting point for good-looking templates with no effort.

A template in the parent account can be shared with all the child accounts which will inherit their branding and credentials from their own account, to populate the email template. This simplifies production and the control of templates. Also templates can be copied individually to a child account.

Template properties

Status: **Loaded** Syntax check: **✓ OK**

Settings HTML template Plain-text template

Name ⓘ
RSS 1

Description ⓘ
Single Story from Blog using RSS

Subject ⓘ
News from []

☐ Archived ⓘ
☒ **Shared** ⓘ

Import template
Choose File

Shared templates
Shared templates are made available to all child accounts. Child accounts can use shared templates by selecting them from the template gallery when sending. If you want to share a template with just a single child account, use the 'Copy to child' button above.

✓ Save Preview

Email Credits

Email sending credits can be bought in chunks and distributed to child accounts by administrators.

These credits last for a year and will expire if they are not used. Credits are used up by sending, or by being transferred to child accounts.

When purchasing, the cost per credit reduces as you buy more.

Account Overview

The agency module creates a single page where the parent account can see an overview of all the child accounts.

The information provided shows the credits allocated and the sending history with grand totals for all the accounts.

Credit transfers

Credit amount:

Account to transfer from:

Account(s) to transfer to:

Child Account 1
Child Account 10
Child Account 11

Selecting more than one account will transfer the given amount to each of them, provided you have sufficient credit.

Transfer credits

Agency statistics for the last 6 months

Smartmessages Demo (This account)

5 contacts. Credit balance: 0.

Month	Mailshots	Messages
April 2020	1	3
March 2020	2	8
February 2020	27	108
December 2019	2	6

Totals for this account plus 12 child accounts

52 contacts.

Month	Mailshots	Messages
April 2020	4	6
March 2020	3	10
February 2020	30	111
December 2019	2	6

Child Account 1

4 contacts. Credit balance: 0. [View account.](#)

Month	Mailshots	Messages
April 2020	1	1
March 2020	1	2
February 2020	2	2

Child Account 10

4 contacts. Credit balance: 0. [View account.](#)

Month	Mailshots	Messages
April 2020	2	2

SAR – Subject Access Requests

Automated Subject Access Requests

Anyone can go to the subscriber page, and if we hold any data linked to their email address, they can log in and see all the data held on them on the Smartmessages system, across all of our customers.

<https://www.smartmessages.net/subscriber.php>

All the data held can be downloaded, edited, or erased, as GDPR requires.

Smartmessages

SMARTMESSAGES

syndrew@gmail.com data stored for Smartmessages

Your data controller is **Smartmessages**; they are responsible for your privacy. Your personal data is handled in accordance with their [privacy policy](#). You'll find their contact details at the bottom of the page.

↑ Return to account list

↔ Log out

Download data

✕ Delete data

Your mailing list subscriptions

Double-opt-in policy

When you subscribe to Smartmessages mailing lists, you will receive a verification message for each one. Open the link inside each message to confirm your subscription. This is to prevent other people from signing you up without your permission.

☐ **Announcements**

Latest news plus hints & tips about getting the best from smartmessages

☐ **Newsletter**

News about e-media and it's growing impact on our lives

☐ **Special Offers**

Special deals for seasonal marketing (eg e-Xmas cards)

Other Options

Account Access

You can have as many people as you like with access to your account, the administrator can add their email address and what level of access they require, so that they can send, look at reports, download lists and so on.

By default, the ability to delete things is disabled. If you want this switched on then we can do it immediately, but with the caveat that delete really means delete, and data can't be recovered!

Account Subscription Policy

Our default subscription policy is double opt-in, compliant with most EU and US legislation. This means that when someone signs up for one of your lists, we send them an email containing a link which they must click before they are added to a list. We also have a "confirmed opt-in" which sends a similar email, but does not require a click. Generally we'll only allow confirmed opt-in if you can provide evidence that a double opt-in is performed elsewhere before data gets to us.

Account Unsubscribe Policy

This can be per-list or account-wide, with account-wide being the default. With per-list, when someone unsubscribes from a list, they are only removed from that list – this allows recipients to, for example, subscribe to a newsletter while unsubscribing from special offers messages. The downside of this approach is that it requires careful attention to list handling outside Smartmessages if you're not going to accidentally send to people that have unsubscribed. For this reason, we default to account-wide unsubscribes – when someone unsubscribes from one list, they are removed from all lists.

Under either mechanism, recipients are suppressed appropriately when uploading lists, so subscribers don't end up back on lists they have already unsubscribed from. You can download these suppression lists on the contacts page, and it's a good idea to periodically use them to remove addresses from lists you hold outside Smartmessages.

API

Our API provides a way for you to write scripts to talk to Smartmessages, opening up endless possibilities for integration with external systems, such as CRM and monitoring. More unusually we also provide callbacks, enabling real-time, event-based sync between systems.

