A **STAR ENTERPRISE** Publication

Software User Guide

STAR Mailings - Desktop Edition

Contact information

Preface

Thank you very much for purchasing our software !

We are pleased that you decided for one of our products and are sure that it will meet (and maybe even exceed) your expectations.

Developing self-explanatory software is our main priority. So usually it just takes a short amount of time to become familiar with the way this application is working.

[This user guide contains the following information]

-> Notes about installation.
-> Explanation of workflows and features.
-> Customer service and support.

We hope you enjoy reading !

The STAR ENTERPRISE software engineering team.

Installation and first steps

The software is ready-to-use instantly - no complex installation required !

1. Unzip the software package on your computer.
2. Move the application folder to the desired location.
3. Execute the software within the application folder.

If you wish to read a more detailed quickstart guide for getting further information, please visit our website at www.starenterprise.com/Assistance/SoftwareCenter/ .

Data security and backups

Please ensure to perform regular backups of this software and your data !

More information about backups and how to restore data is available on our website at: www.starenterprise.com/Assistance/SoftwareCenter/ .

Introduction to mailings - general overview

[Mailing campaign essentials]

* Keep it brief and clear; 1/4 or 1/2 of continuous text, structured by headlines, lists and other types of highlighting.

* Every mailing campaign should advertise for one single product or service only; don't overwhelm your readers by providing a bunch of different offers.

* Address the recipients in a personal manner - by name and by using individualized text blocks. This arouses curiosity and inspires further reading.

* At the top and bottom of the sales copy, you should ask for action: "Visit our website now !", "Register today !" or "Call us for details !".

* Utilise the so-called "wicking effect" by advertising for limited offers and specials.

* Don't just sell, provide additional value... coupons, rebates or exclusive offers that are only available for list subscribers will help you to keep the attention of your readers and increase the popularity of your marketing campaigns !

[Technical notes for creating mailings]

Notation of links used in HTML mails:

Please make sure that all links are consisting of absolute URLs (e.g. "http://www.domain.tld/pics/picture.png" instead of "../pics/picture.png"). Otherwise, mail clients will be unable to properly show the contents of your mail.

Attachments... maximum size of files:

Some people may only have a slow Internet connection. Downloading mails which contain large attachments could mean a time-consuming challenge for them.

For this reason, we recommend a careful decision about adding attachments. All attachments in total should not exceed 2 MB in size. It is suggested to provide larger files (like catalogues or brochures) as separate downloads.

Attachments... preferable file types:

Please consider that not all file formats can be opened by every recipient. For compatibility reasons, you should use established cross-platform file formats only.

Printable documents	PDF, RTF
Bitmap images	PNG, JPEG, GIF
Vector graphics	SVG
Videos	MPG (MPEG I, II, IV)
Audio	MP3, MP4 (MPEG-Layer 3)

Introduction to mailings - technical notes

[Mail server configuration]

The software requires access to its own dedicated e-mail account (services POP and SMTP) to send out mailings and to handle remote management tasks.

Note: This e-mail account should be solely used by the software; accessing it by other means may lead to unexpected results.

Sending mailings and your ISP

Many Internet service providers (ISPs) have rules and limitations regarding the distribution of mass mails. For smaller mailing lists (< 500 messages per day), this should not matter.

If you intend to send frequent mailings to larger lists, you may contact your account manager for more information. Usually, your service provider will be able to provide you with a suited mail server plan.

Alternatively you may also contact our customer service for assistance. We are offering virtual and dedicated server solutions suited for mass mailing and much more.

[System requirements]

The software has no special requirements on hardware or operating system. A broadband Internet connection is recommended.

In some cases, you may need to adjust configuration of your virus scanner or firewall software to ensure smooth mail delivery (whitelist settings, exception rules).

[Remote management and scheduler]

Both features can be enabled or disabled using the general preferences window and also may be configured to work automatically in the background.

Please keep in mind that these features are requiring the software to run and the computer being connected to the Internet.

Tip: Keep the software always running in the background. It doesn't need much system resources and not interferes with your daily activities.

Software configuration

[Accessing the general preferences window]

Click on the button "General preferences" available on the main application window or select "General preferences..." from the application menu (see entry "Administration").

[Tab "Server Settings"]

The software requires access to its own dedicated e-mail account (services POP and SMTP) to send out mailings and to handle remote management tasks.

Note: This e-mail account should be solely used by the software; accessing it by other means may lead to unexpected results.

Incoming mail server / Outgoing mail server

E-mail address of the software's mail account: This is the e-mail address as assigned to the mail account. It's also used as sender address in all outgoing mails.

Address/Connection method/Port/User name/Authentication/Password: Type in the account data of the mail account into the appropriate fields.

Please use the connection method "Secure (SSL)" and/or the authentication type "APOP" only if these are supported by your service provider. Otherwise the server may refuse any connection attempts.

Checking mail server connections

In order to check the communication between your server's mail service and the software, click on the corresponding button to initiate a test connection.

Note: Checking the communication with the server for outgoing mails requires a valid e-mail address in the field "E-mail address of the software's mail account".

Sending mailings and your ISP

If you are using the mail service provided by your Internet service provider, please read "Creation of mailings - general overview and prerequisites" later in this documentation.

If you are using your own mail server, please contact your system administrator to discuss the suitability of the current server setup being suited for sending mass mails.

Software configuration

[Tab "Appearance"]

Appearance of outgoing mails

These parameters allow you to adjust the header information of outgoing mails.

User profiles - custom field labels

The labels specified here are intended to make it easier for you identifying each field at the graphical user interface.

Administrator

Type in the e-mail address of the administrator, the person who is responsible for the mailing lists (it is used by the command tag `<.AdminEMailAddress>`).

It's also the target address when sending a preview of a mailing (e.g. to test individualized mail contents) you currently work on.

Software configuration

[Tab "Remote Management"]

More information is available at "Remote management" later in this documentation.

Note: Any features described here are applying solely to tasks executed by the remote management feature.

General behaviour

Enables or disables the remote management.

For testing purposes or in case of errors, the software's mail account can be cleaned up (removes messages from the inbox) and pending command mail replies can be deleted from the internal database.

User profiles management

The "Blocked domain list" may hold fully qualified domain names (e.g. "baddomain.tld") as well as strings (e.g. "bad"). Attempts to create a user profile with an e-mail address that matches against the list is being silently ignored.

Note: Adding new entries into the blacklist does not take effect to already existing profiles.

The setting "Validity of command mails" specifies the time period to wait for commands being confirmed until they become removed (e.g. opt-in or opt-out requests).

The setting "Keep users without subscriptions" allows you to change the handling of user profiles that have no subscriptions (active ones or such waiting for confirmation). If this option is disabled, those profiles will be removed after one-day waiting.

"Delete unreliable user profiles" automatically removes user profiles having reached a deliverability rate of less than 10 %.

If the option "Send safe error messages only" is enabled, error notifications are sent exclusively in response to failed command mails of already existing user profiles. Otherwise, all e-mail addresses (except blocked ones) are going to receive such mails.

It's possible to forward copies of all outgoing replies to command mails also to an external e-mail address of your choice.

Scheduled mailings

Enables or disables the scheduler to send time controlled mailings.

The scheduled mailing feature requires remote management to be enabled and set for background execution. Also consider that the software needs to run in order to send scheduled mailings.

Software configuration

[Tab "Global Preferences"]

Searching automatically for software updates

If enabled, you will be notified about updates and bug fixes being available for download.

Backup, data management and restore

Used to create backups of the internal databases and to clean up the mail archive regularly in the background.

Restore databases from available backups

Select the backup to restore by clicking on the appropriate button.

Note: Restoring databases requires an immediate restart of the software.

Software configuration

Individualised mailings

[Individualised mail contents]

For all kinds of mailings, including scheduled ones, you are able to use individualised contents to address each recipient personally.

Just add one or more command tags to the subject line or message body. The software will automatically replace these tags with matching contents.

If there is no matching content available for a command tag, the command tag is simply getting removed and any duplicate space characters are automatically cleaned up.

Tip: Command tags can be added also by using the contextual menu provided. Just click on the right mouse button while the mouse pointer is placed within the text input field (alternatively: use keys CTRL or ALT on systems with one mouse button).

Command tags at a glance (as used in mailings):

Note: All command tags are case-sensitive.

`<.EMailAddress>`	Field "E-mail address" of the user profile.
`<.Salutation>`	Field "Salutation" of the user profile.
`<.FirstName>`	Field "First name" of the user profile.
`<.LastName>`	Field "Last name" of the user profile.
`<.CustomFieldx>`	Field "Custom field x" of the user profile. x = 1-6
`<.Language>`	Language set for this user profile.
`<.ListLabel>`	Label of the mailing list.
`<.ListDescription>`	Description of the mailing list.
`<.LocalShortDate>`	Local date as set on the computer.
`<.LocalLongDate>`	Local date (usually including weekday and full month).
`<.LocalShortTime>`	Local time as set on the computer.
`<.LocalLongTime>`	Local time (usually including seconds).
`<.SQLDate>`	Date format: YYYY-MM-DD
`<.SQLDateTime>`	Date format: YYYY-MM-DD HH:MM:SS
`<.AdminEMailAddress>`	E-mail address of the administrator.
`<.SystemMailAccountAddress>`	E-mail address of the software's mail account.

`<.RemovalLink>` 1], `<.RemovalSubject>` 2]
     Instructions on how to get removed from a subscribed mailing list.

Individualised mailings

<u>Additional command tags allowed in certain system mails only:</u>

Opt-in confirmations, opt-out confirmations...

`<.OptInConfirmationLink>` 1], `<.OptOutConfirmationLink>` 1]
`<.OptInConfirmationSubject>` 2], `<.OptOutConfirmationSubject>` 2]
     Instructions on how to confirm a subscription to or removal from a mailing list.

Error notifications...

`<.FoundErrors>`
     Information about occurred errors during processing a request.

<u>Remarks on the use of command tags</u>

1] When embedded in HTML mailings, these command tags must be enclosed by an anchor element with the command tag inserted as value for the href attribute, e.g.:
`<a href="<.RemovalLink>">Click here to unsubscribe.</a>`

2] These tags are generating the codes as used in subject lines of command mails. In this way, you can create alternative instructions for mail clients disallowing to have clickable links in e-mail messages (e.g. some web-based mail clients).

[If/then(/else) conditions]

By using if/then(/else) conditions, you can build mails containing variable text modules being added based upon the content of a specific command tag.

It is also possible to use command tags within those text modules.

The software comes with a built-in tool that can help you to create custom if/then(/else) command blocks: It is accessible at the contextual menu of the text input fields (click on the right mouse button or CTRL/ALT key on systems with one mouse button).

<u>Structure of if/then conditions:</u>

```
<IF <.CommandTag> OPERATOR "Value" THEN>
...
</IF>
```

If the condition returns "true", the text module `...` is added to the mail.

<u>Structure of if/then/else conditions:</u>

```
<IF <.CommandTag> OPERATOR "Value" THEN>
...
<ELSE>
...
</IF>
```

If the condition returns "true", the first text module is added to the mail, otherwise the one following the tag `<ELSE>`.

Individualised mailings

Supported operators:

`CONTAINS`	contains (a partial string)
`NOT CONTAINS`	does not contain (a partial string)
`EQUAL`	matches, is equal to
`NOT EQUAL`	does not match, is not equal to
`GREATER THAN`	greater than
`LESS THAN`	less than

Example 1: Query the gender as stored in the custom field

```
<IF <.CustomField1> EQUAL "female" THEN>
Fancy summer fashion; get your season's favourites now !
Shirts, sweaters, jackets, shoes... all of latest trends.
</IF>
```

Example 2: Query the year of birth as stored in the custom field

```
<IF <.CustomField2> GREATER THAN "1994" THEN>
This month's special: The new taste of spirits !
<ELSE>
This month's special: Buy one soft drink, get the second for free !
</IF>
```

Note: The keywords (`IF`, `THEN`, `ELSE`), operators and field values are case-sensitive. Field values must be set in double quotation marks.

[Validation of individualised mailings]

By using the preview feature (sending a mail to the admin's e-mail address), you can easily validate the contents of individualised mailings.

Command tags:

* Valid tags are amended by the string "Okay".

* Tags not recognized are kept untouched.

If/then(/else) conditions:

* Valid command blocks are processed by using the assumed result "true" (if/then: shows text module, if/then/else: shows first text module).

* Command blocks not recognized are kept untouched.

Main application window

[Tab "Start"]

On this screen, you get an overview about the actual system status and general statistics as well as information about the currently processed tasks.

In addition, the tab gives direct access to commonly used features.

Tip: The statistics are automatically updated; if you wish to re-calculate the statistics immediately, please move the mouse pointer from outside to the inside of the app window.

[Tab "Mailings"]

On this screen, you will prepare a mailing for being distributed. It is the tab, you are probably working with most of the time.

Tip: The button "Save as template" is also useful to save a mailing-in-work for later access.

The feature "Send preview to administrator" is processing the mailing and sending it to the e-mail address specified in general preferences.

[Tab "User Profiles"]

On this screen, you can manage user profiles and subscriptions.

Sort records by clicking on a row's header. Resize columns by moving the mouse pointer over a column divider and dragging it to the left or right.

Select a record for editing by clicking on the row.

If you wish to *mark multiple entries*, hold down the STRG or command key (depending upon your operating system) while selecting records.

If you wish to *mark a list of entries*, click on the first one and hold down the shift key when selecting the last entry.

Besides the current profile status, the row "Status" also shows a score value that indicates the reliability of message delivery to the e-mail address. It ranges from 100 (excellent) to 0 (insufficient).

The listbox "Subscribed lists" contains all mailing lists available on the software, whereas the lists that have been subscribed by the currently selected profiles are marked.

Note: Lists with the status "opt-in" or "opt-out" set, are not marked. By selecting such a list, it will lose its current status and change to "Okay" (= mailing list subscribed).

Values of the field "Profile status":

Active   Default value; the profile is being used.
Disabled   Disabled profile; access possible via remote management.
Blocked   Disabled profile; cannot be accessed via remote management.

The profile status "Blocked" is suited to suspend some unwelcome e-mail addresses. Alternatively, you can also block entire domains to create profiles; please take a look at the general preferences window for details.

Main application window

The fields "Custom field..." can hold any type of information, it is great for creating individualised mailings.

Searching the user profile database:

The software is providing an easy to use way to search the database of user profiles. The menu "..." (next to "Search" button) allows you to access more complex search operations.

If you want to reset the search, just click on the button "Show all records".

[Tab "Mailing Lists"]

On this screen, you will find all available mailing lists.

Sort records by clicking on a row's header. Resize columns by moving the mouse pointer over a column divider and dragging it to the left or right.

Select a record for editing by clicking on the row.

If you wish to exclude a list from being accessed by the remote management feature, mark the checkbox "Use as internal list".

Tip: Internal lists are suited especially for all types of closed user groups, like sales representatives or club members.

[Tab "Mail Archive"]

On this screen, you can browse through previously sent mailings.

Sort records by clicking on a row's header. Resize columns by moving the mouse pointer over a column divider and dragging it to the left or right.

Select a record for editing by clicking on the row.

If you wish to *mark multiple entries*, hold down the STRG or command key (depending upon your operating system) while selecting records.

If you wish to *mark a list of entries*, click on the first one and hold down the shift key when selecting the last entry.

The row "No. (Status)" reflects the current delivery status of each mailing:

OK   The mailing has been completely sent.
ACTIVE   The mailing is currently sent.
PAUSE   Delivery has been interrupted (use menu "More tasks..." to resume).

Note: The prefix "SCHED_" marks entries that have been added by the scheduler.

It is possible that a mailing marked as "OK" could not be delivered to all recipients. In this case, you may use the "More tasks..." menu to try sending failed deliveries again.

Unsent scheduled mails that are available in the archive may be also sent manually (see "More tasks..." menu). Otherwise, they are processed next maintenance cycle.

Main application window

Tip: The task "Print mailing..." is printing the source code of HTML mails. If you wish to print the rendered view, use the button "Preview".

[Tab "Languages"]

On this screen, you can access languages and their assigned system mail templates.

Select a record for editing by clicking on the row. There must be at least one language available on the software to work properly.

If the remote management is unable to assign a language to a submitted task (command mail), the software will use the one marked with "default language".

System mail templates

These mail messages are automatically sent by the remote management feature to inform users about the occurrence of certain actions regarding their profiles and subscriptions.

Note: Even if you have the remote management feature turned off, you must fill in the system mails' message bodies for each language (just keep default values).

Tip: Command tags can be added also by using the contextual menu provided. Just click on the right mouse button while the mouse pointer is placed within the text input field (alternatively: use keys CTRL or ALT on systems with one mouse button).

Task: *Incoming command mail asking for list subscription...*

The mail "Opt-in confirmation" is being sent, so the legitimate owner of the e-mail address can confirm the mailing list subscription.

Task: *Subscription for a mailing list has been confirmed...*

The mail "Welcome" is being sent (optional, see mailing list settings).

Task: *Incoming command mail asking for removing a list subscription...*

The mail "Opt-out confirmation" is being sent, so the legitimate owner of the e-mail address can confirm the mailing list subscription (optional, see mailing list settings).

Task: *The removal of the mailing list subscription has been confirmed...*

The Mail "Goodbye" is being sent (optional, see mailing list settings).

Task: *An incoming command mail could not be processed (e.g. user profile or mailing list does no longer exist, etc.)...*

The mail "Error notification" is being sent.

Main application window

[Tab "Templates"]

On this screen, you can create templates that can be used later to save time while preparing a new mailing.

Sort records by clicking on a row's header. Resize columns by moving the mouse pointer over a column divider and dragging it to the left or right.

Select a record for editing by clicking on the row.

Tip: Command tags can be added also by using the contextual menu provided. Just click on the right mouse button while the mouse pointer is placed within the text input field (alternatively: use keys CTRL or ALT on systems with one mouse button).

Tip: The task "Print mailing..." is printing the source code of HTML mails. If you wish to print the rendered view, use the button "Preview".

[Tab "Scheduler"]

On this screen, you may set up mailings being distributed automatically by the software.

Sort records by clicking on a row's header. Resize columns by moving the mouse pointer over a column divider and dragging it to the left or right.

Note: The row "Scheduled date of delivery" is sorted in chronological order, grouped into mailings scheduled by fixed dates and such relative to the recipients' subscription dates.

Select a record for editing by clicking on the row.

Absolute delivery date: Recurring mailings sent on fixed dates during one year period.

Relative delivery date: One-time mailings sent relative to the recipients' list subscription dates (respectively, the date of confirming a subscription).

Tip: Command tags can be added also by using the contextual menu provided. Just click on the right mouse button while the mouse pointer is placed within the text input field (alternatively: use keys CTRL or ALT on systems with one mouse button).

Main application window

[Tab "Data Exchange"]

On this screen, an easy to use interface for importing/exporting user profiles is provided.

<Tab>: Tabulator
<CRLF>: Line break

Supported import formats

Smart detection of e-mail addresses: Intelligent algorithm to search any kind of text-based documents for e-mail addresses.

Set of records - tab/CRLF scheme:

```
E-mail address<Tab>Salutation<Tab>First name<Tab>Last name<Tab>
Custom field 1<Tab>...Custom field6<CRLF>
```

Supported export formats

Tab/CRLF: Fields separated by tabulators, records separated by line breaks. Structure of records as shown above.

CRLF/2CRLF: Fields separated by line breaks, records separated by double line breaks...

```
E-mail address<CRLF>
Salutation<CRLF>
First name<CRLF>
Last name<CRLF>
Custom field 1<CRLF>
...Custom field 6<CRLF>
<CRLF>
```

XML: Records generated according the following scheme...

```
<Record><CR>LF
<EMailAddress>...</EMailAddress><CRLF>
<Salutation>...</Salutation><CRLF>
<FirstName>...</FirstName><CRLF>
<LastName>...</LastName><CRLF>
<CustomField1>...</CustomField1><CRLF>
...
<CustomField6>...</CustomField6><CRLF>
</Record><CRLF>
```

Remote management feature

[General overview]

The remote management feature automatically processes certain tasks in the background while the software is running:

* Manages incoming mailing list subscriptions and removals.
* Handles returned and undeliverable mails (see status column at user profiles database).
* Sends scheduled mailings and pending command mail replies.

<u>User-driven mailing list subscriptions</u>

Similar to a server-based mailing list management solution, the remote management feature allows people to manage their subscriptions and profiles online.

This is done by using special e-mail messages (so-called command mails), which are sent to the software's mail account and then being processed by the remote management.

The software manages the mail account independently, therefore no interaction from the user is required.

Note: Command mails must be sent from the same mail account (e-mail address) that is being intended to perform an action on.

On your website, visitors are able to...

* subscribe to a mailing list using the opt-in verification method.
* cancel subscriptions (processed instantly or by using the opt-out verification method).

In every sent mailing, subscribers are able to...

* cancel subscriptions for the respective mailing list (processed instantly or by using the opt-out verification method).

Remote management feature

<u>Web-based subscriptions</u>

In order to allow people subscribing to your mailing lists, you need to put a mailto-typed link on your website, according to the following scheme:

```
mailto:listmanager@domain.tld?Subject=Action:*RequestSubscription**
List:*MailingList**Language:*Language*
```

Replace "listmanager@domain.tld" with the e-mail address of the software's mail account. "MailingList" and "Language" also must be replaced by matching values (please note that both are handled case-sensitive).

Request additional profile data during subscriptions

You can ask new subscribers to submit additional information that may be used for sending individualized mailings (salutation, first & last name, six custom values of your choice).

Just extend the subject line with a pipe symbol (|) and pipe-delimited data provided in a given order. See this scheme for details:

```
mailto:listmanager@domain.tld?Subject=Action:*RequestSubscription**
List:*MailingList**Language:*Language*|Salutation|First name|
Last name|Custom1|Custom2|Custom3|Custom4|Custom5|Custom6|
```

It's possible to skip unwanted fields, as long as the pipe characters are kept. The following example will only handle first name and last name:

```
mailto:listmanager@domain.tld?Subject=Action:*RequestSubscription**
List:*MailingList**Language:*Language*||First name|Last name|||||||
```

In practice, you may use a web-based form to gather the desired information in combination with a scripting language like JavaScript to build the mailto-link.

Please take care to implement a function that checks for pipe symbols typed into the form and replaces them with alternative characters.

Tip: Try the code generator to create ready-to-use links and web-forms that can be instantly added to your website. It's a great tool for users without programming knowledge or developers looking for a good basis to start working with.

Note: Submitted profile data is used only in the case a new profile must be created. If a user profile already exists (just adding another subscription), submitted profile data is ignored.

<u>Code generator</u>

The built-in code generator is a handy tool to create HTML/JavaScript source codes and command tag samples for various remote management tasks.

See application menu entry "Lists" to access the code generator and follow the instructions.

Remote management feature

[Use of the remote management feature]

You can turn on or off the remote management feature on general preferences window.

In order to start a a remote management cycle, click on the appropriate button available on the tab "Start".

Please keep in mind that the remote management is only working as long as the software runs on your computer and is able to get access to an active Internet connection.

Tip: The software will also work well on any server within a "virtual machine" (desktop computer virtualization environment). By doing so, you can easily realise continuous operation 24 hours a day.

Note: Scheduled mailings are also requiring remote management to be enabled.

[Background execution]

Besides starting a remote management cycle manually, you may also activate background execution to automatically run these tasks while you are working on your computer.

We recommend background execution, because this is the most convenient way of using the remote management capabilities of the software. And while the software is in idle mode, it takes no reasonable system resources.

Tips: Add the software to the autostart feature of your computer, so it will load automatically each time you turn on your computer. You may also minimize the main app window while you are busy with other apps.

Notes on scheduled mailings

Once a day, the software searches for scheduled mailings due to be sent. This is done at the first execution of remote management (initiated automatically or manually by the user).

If the user aborts a remote management cycle before it's finished, remaining mailings will be sent during the next cycle.

All scheduled mailings' activities are recorded in the mail archive.

Status window

During each cycle, the software opens a small status window that keeps you informed about the current tasks running.

Notes on background execution

The status window is placed hidden on the right bottom of the screen and automatically disappears within thirty seconds after the remote management cycle has been completed.

Tip: In order to view the entire status window, just move your mouse pointer over the window to snap it into its original position (auto-closing is then deactivated).

Customer service, help & support

Customer service: www.starenterprise.com/Assistance/SoftwareCenter/

Our support website provides resources covering these topics...

-> Quick-start guides providing help with installation and instructions for getting started easily.
-> Frequently asked questions (including answers ;-), technical support.
-> Information about available updates and bugfixes.

Technical support by e-mail: support@starenterprise.com

[Note for registered users]

In order to allow preferred handling of your inquiry, please always include your license ID with every request. See the Assistance menu of the software for details (or have a look at the license document received upon purchase).

License information

License ID	
License owner	
Location of use / Host	

Space for your own notes