Advanced Features User Guide

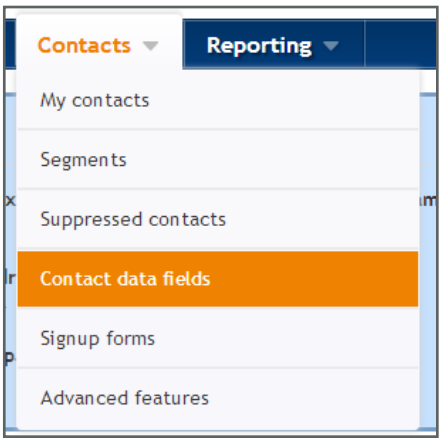
Table of Contents

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

Adding Custom Fields to Address Books

Custom data fields can be added to address books to capture and/or contain additional information about your contacts. The more useful data you can collect on your contacts, the more you can segment, target and personalize your campaigns and generate better response rates.

There is no limit on the number of custom data fields you can create and when you create a custom data field it is added to all the address books in your account.This way, all your address books maintain the same structure.



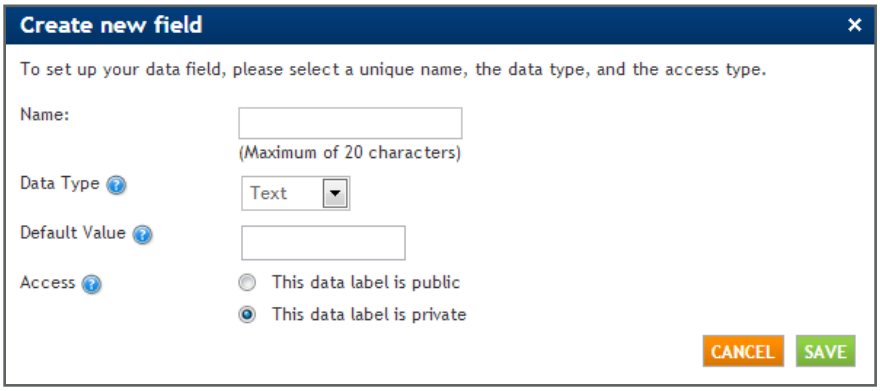
To add a custom field to an address book, select the option **Contacts** from the navigation panel.

From the sub-menu displayed, select the option **Contact Data Fields**.

A list of the contact data fields already created is displayed. The data fields GENDER, FIRSTNAME, FULLNAME and LASTNAME are created automatically by OpenMoves when your account is created.

Jun 08 2012 10:15 PM	Jun 08 2012 10:15 PM	FIRSTNAME
Jun 08 2012 10:15 PM	Jun 08 2012 10:15 PM	FULLNAME
Jun 08 2012 10:15 PM	Jun 08 2012 10:15 PM	GENDER
Jun 08 2012 10:15 PM	Jun 08 2012 10:15 PM	LASTNAME

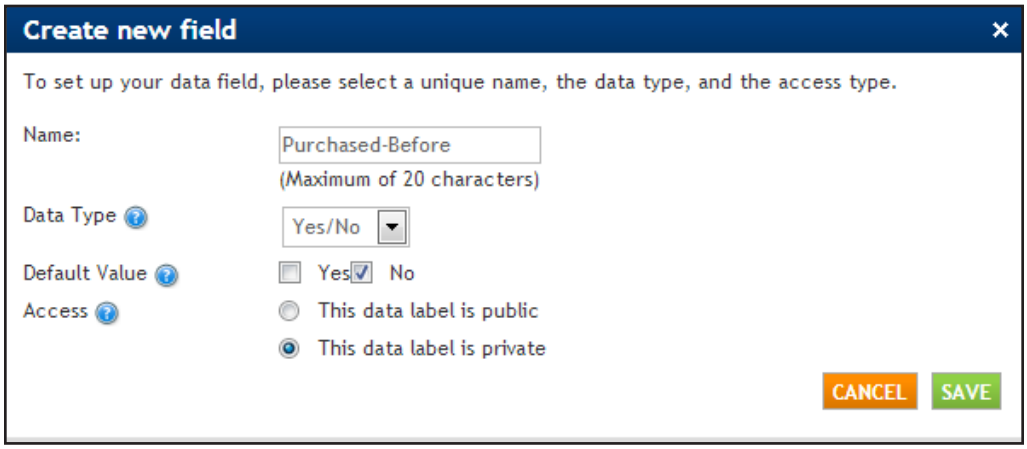
To create a new field, click on the **ADD NEW** button and the **Create new field** window is displayed.



Follow these steps to set-up your new data field.

1. **Name.** Enter a unique name for this new data field. You cannot use spaces between words when creating a name for a new field. For example, our data field name is “Purchased Before” but we have entered this as *Purchased-Before*.
2. **Data Type.** This is a drop-down box, you have the choice of *Text*, *Numeric*, *Date/Time* and *Yes/No*. Make the appropriate selection.
3. **Default Value.** You can enter a default value for the data field in the event that it is not populated as a result of the uploading of your data. For example, if this was a “Yes/No” data type, you might default the value to “No”.

4. **Access.** These radio buttons determine who has access to updating this field.
   - **This data label is public** – this will allow your contacts to view/amend data within this field.
   - **This data label is private** – this will allow only users of your OpenMoves account to view/amend data within this field.



When you have completed the screen, click SAVE. The newly created field now appears on the **Contacts: Data fields** screen. You can review the details of any field by clicking on the properties icon.

Creating Dynamic Content

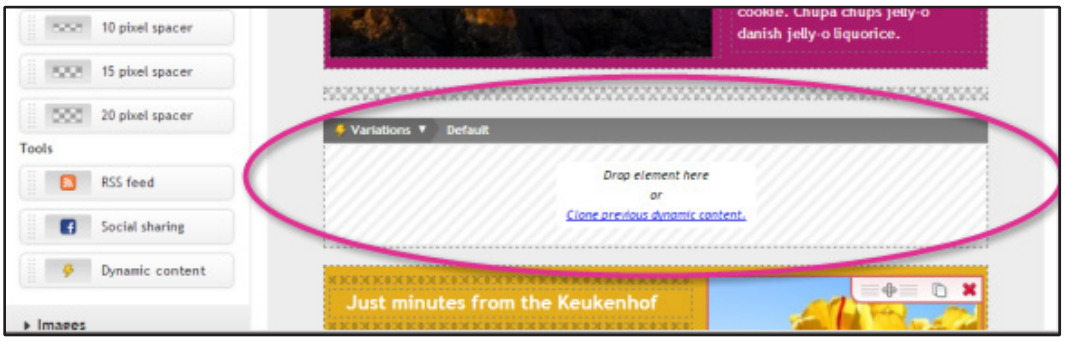
Dynamic Content enables you to tailor your campaign so different groups of your audience receive different content, offers, images, copy or calls to action. This means you can send one campaign with multiple targeted messages for different groups of customers. Which message each group receives is dependent on the rules you set when you create the Dynamic Content.

To create Dynamic Content within the drag-and-drop editor

Drag a dynamic content element into your campaign content from the sidebar.

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

This will create a new element with no rules and no content.



You are now ready to start building your dynamic content.

Elements of a dynamic content element

Each dynamic content element consists of three main aspects:

Default content

This is the default content that your contacts will see if none of the rules are met. Your default content can be blank if you don't want your contacts to see the content by default.

Variations

This is the content that you want contacts to see who meet specific criteria set within your rules. This content can be blank or contain any other drag-and-drop editor elements, including other dynamic content.

Rules

These are the criteria you set to determine whether contacts see the default content or a variation. For example: "Gender equals Male", or "Age is greater than 65" (rules can be much more complex than this).

Creating your content

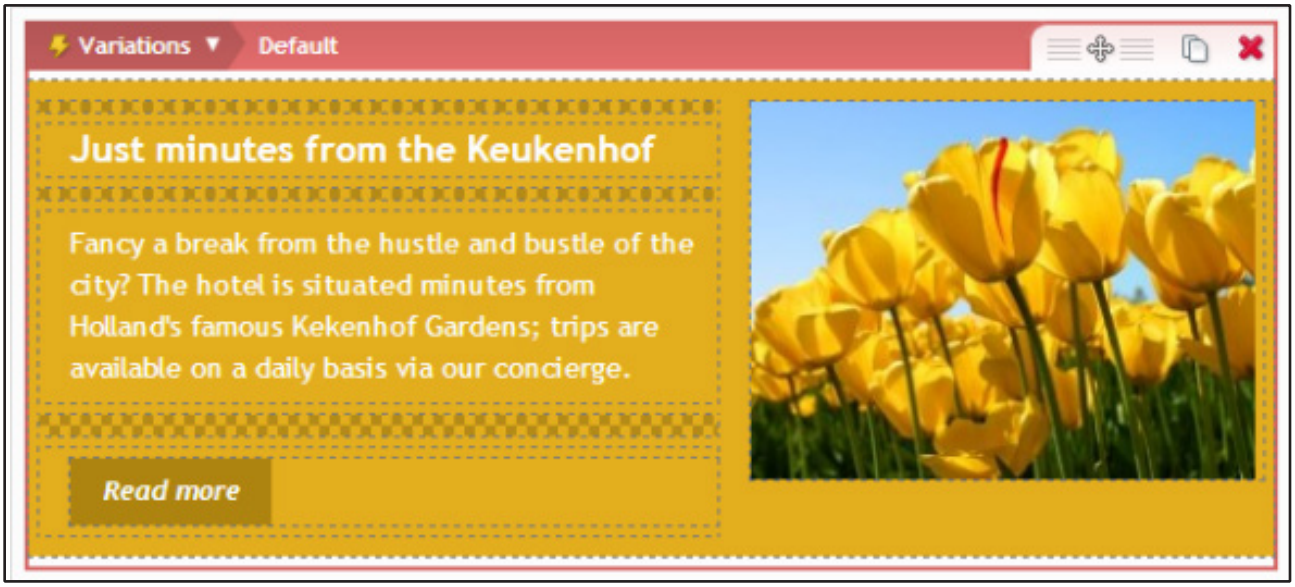
Just like any other drag-and-drop editor dropzone, you can drag content elements into your default content and variations from the build palette, or from sections of your current campaign.

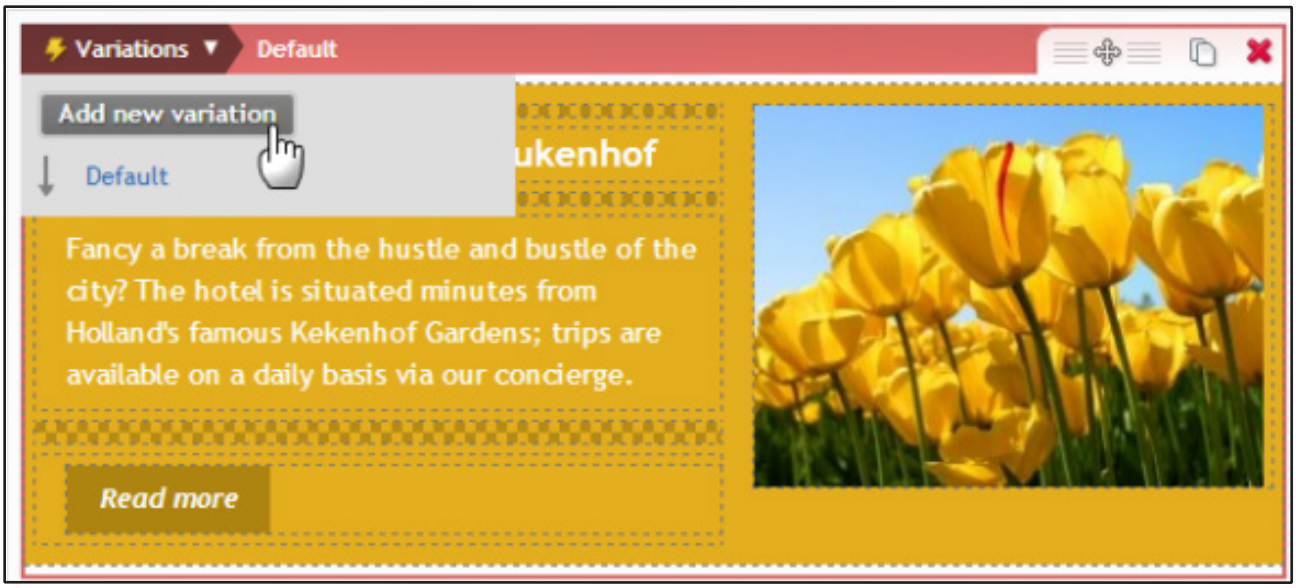
In the below example, we've dragged in a piece of content from the existing template to use as the default content.

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

You can also clone a piece of dynamic content used in a previous campaign.

Once you've created your default content, you're ready to add your variation content. Click on *Variations* in the top left corner of the element, and then the *Add a new variation* button.

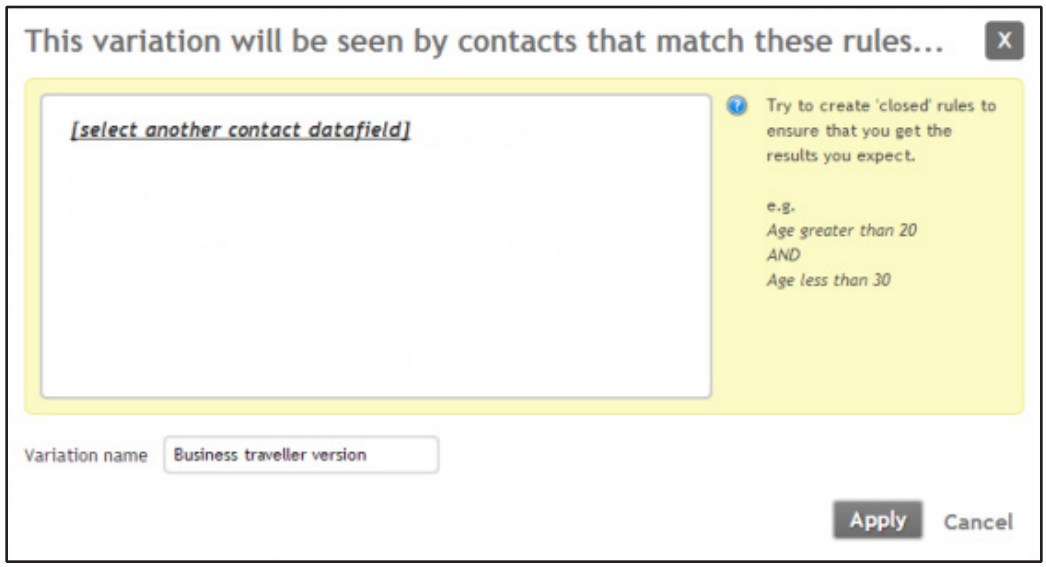




This will bring up a box with details for your new variation. First of all, give the variation a name; in the image below we have named the variation "Business traveler version".

Next you need to set a rule based on one of your default or custom data fields - to do this click on ***[select another contact datafield]***. This will open the rule builder.

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779



Select from one of the default or custom data fields to base your rule. Below the data fields you can set what rule is applied.

For text based fields you can set rules for:

- Equal to
- Not equal to
- Contains
- Does not contain
- Starts with
- Ends with
- Is empty
- Is not empty
- Does not begin with
- Does not end with

For date based fields you can set rules for:

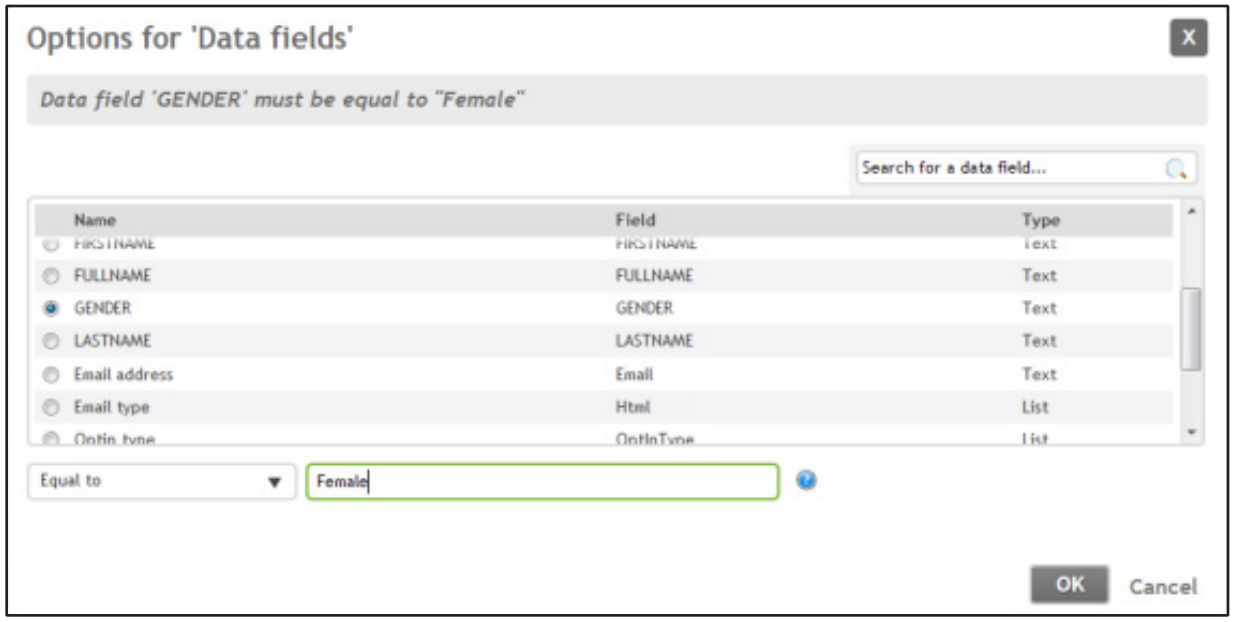
- On
- After
- Before
- Is empty
- Is not empty

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

And for number based fields you can set rules for:

- Equal to
- Not equal to
- More than
- Less than
- At least (i.e. Greater than or equal to)
- At most (i.e. Less than or equal to)
- Is empty
- Is not empty

And for boolean fields you can set rules based on the answer being on (true) or off (false).



Once your rule is set, click *OK*.

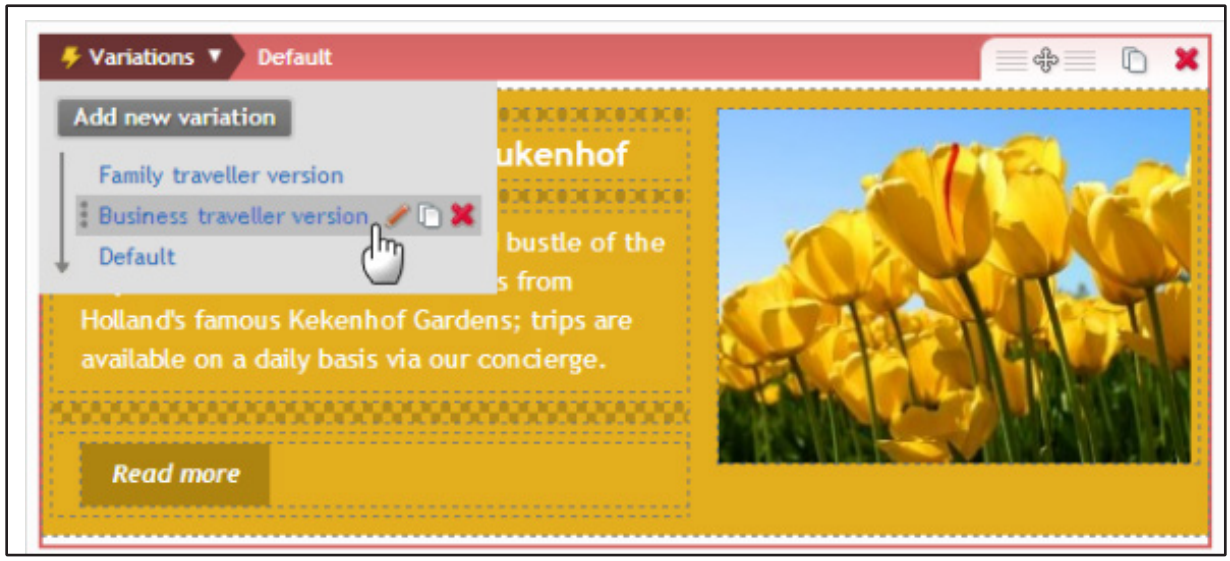
You can add multiple rules to be very specific about what content to show each client. The AND lozenge indicates that all rules created must be true for a contact to see your variation. Clicking on this will toggle between AND and OR; if set to OR only one of your rules need be true for a contact to see your variation.

When all your rules are ready, click the **Apply** button.

You now have a piece of dynamic content with two variations. You can see what variation is currently

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

being displayed by its name in the top left hand corner. To switch between variations click on **Variations** in the top left hand corner of the element.



In this drop-down menu you can:

- Add another variation
- Select the variation you want to view and work with
- Edit the rules for the variation (by clicking on the pencil icon)
- Duplicate the variation (by clicking on the duplicate icon)
- Remove the variation (by clicking on the red cross icon)

You can also rearrange the order the rules are applied by dragging the variation names up or down; the *default* variation will always be the last one in the list.

You edit the content on your selected variation by dragging in the content you want displayed to contacts matching the rules applied.

Previewing dynamic content

When previewing your campaign, you can choose to:

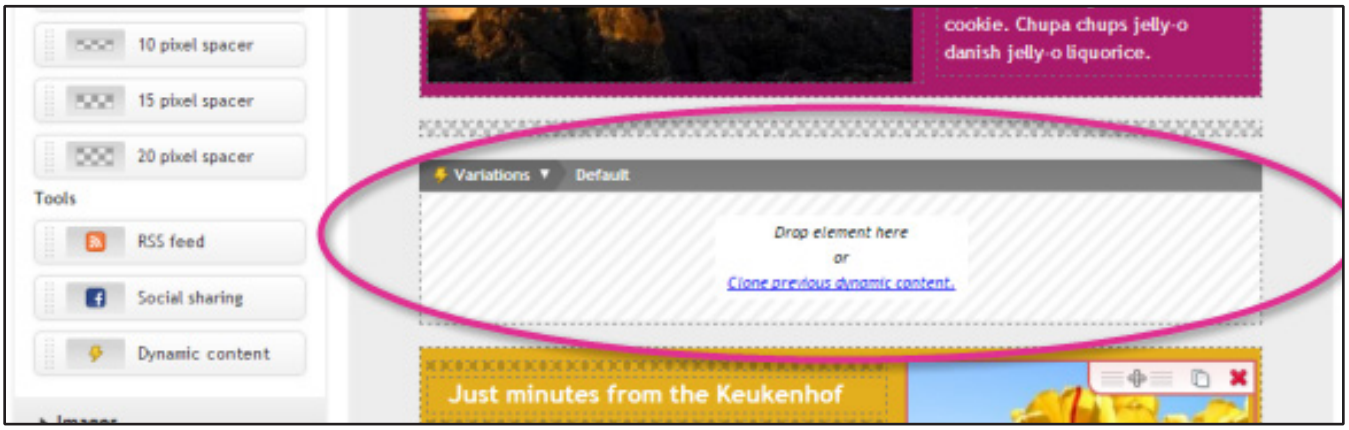
- Preview it on behalf of a specific recipient using their data fields
- Choose which dynamic content elements to show

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

Copying a previously used piece of dynamic content

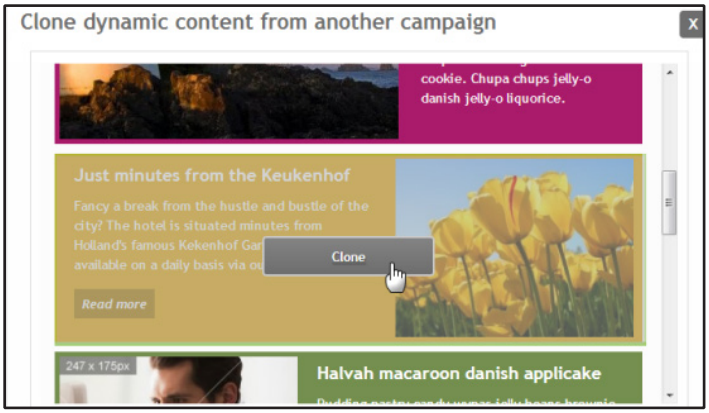
To save you from having to create the same rules each time you want to use dynamic content, you can copy pieces of content easily from one campaign to another.

In your newly created dynamic content element, click on *Clone previous dynamic content*.



You will be shown a list of campaigns which contain at least one dynamic content element.

Select the campaign containing the element to be cloned and you will be shown a preview of that campaign.



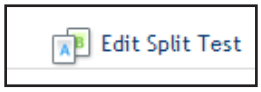
Move the mouse over the element to be cloned and click the **Clone** button - a copy of that element including all rules and content will be created in your new campaign.

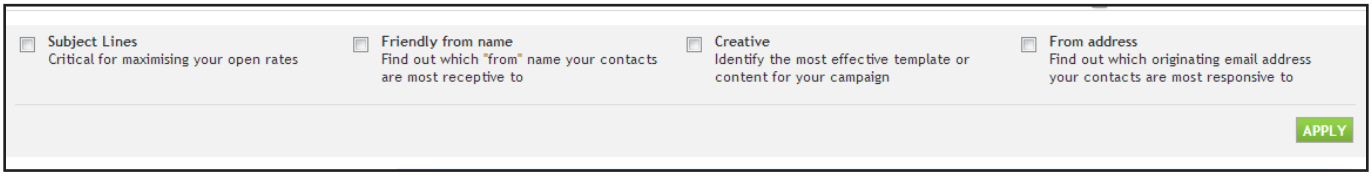
OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

Using Subject Line Split Testing

OpenMoves includes a split testing tool which enables you to test more than one subject line in a campaign. Our email platform will analyze which line is performing the best and send the rest of your email sends using that subject line. This lets you test and maximize your open rates using the best performing subject line.

To use split testing, open your campaign in **My Campaigns** by clicking on the edit pencil. Use the *Create* stage of campaign creation to enable split testing. Next, click the **Edit Split Test** link towards the top right of your screen - this will open your split test options window, as shown below. You can select all or just some of the these options. Make your selections by using the checkboxes alongside each one.



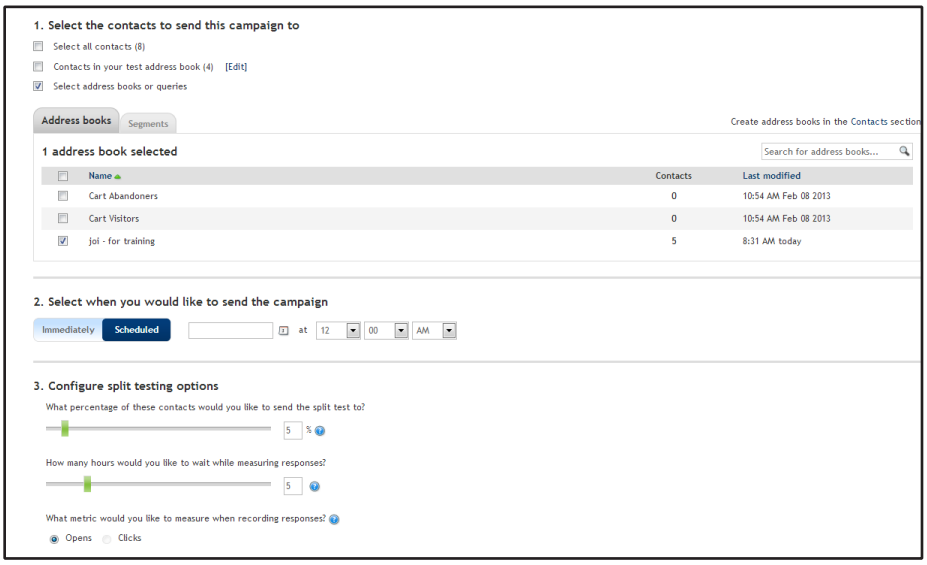


You can enable simple split testing on subject lines by clicking on the plus tab.

This will allow you to make as many as ten variations.

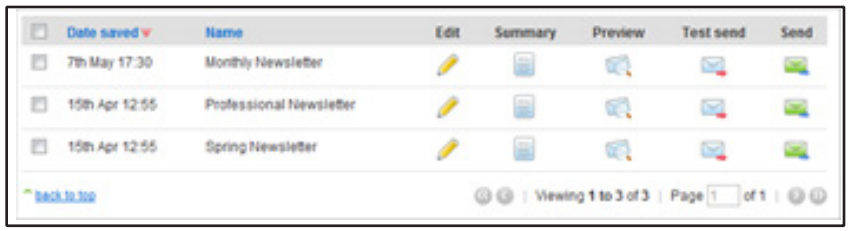
Sending a campaign using a split test

Step 4 of the Campaign Creator (Contacts) will enable you to set your split test parameters.



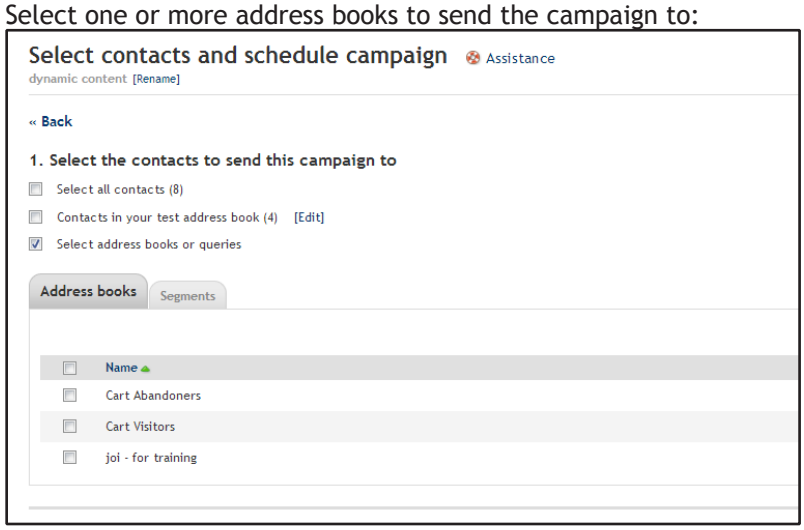
If you have already closed your campaign down, then select Campaigns from the navigation menu. A list of unsent

campaigns are displayed.

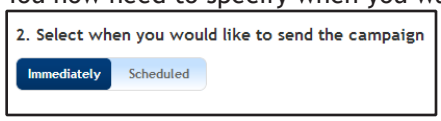


To send a particular campaign, click on the envelope icon situated in the Send column against the relevant campaign. You will be taken to the same Contacts screen as shown above.

Select one or more address books to send the campaign to:

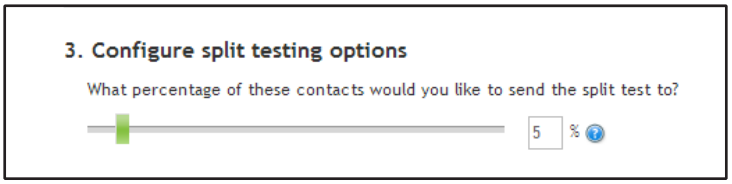


You now need to specify when you want the campaign sent:



Check the **Immediately** box if you want the campaign to go now or select **Scheduled** to arrange a send date and time in the future.

As you continue to select options to split test different variables, you now need to complete the Split Testing area of the screen:



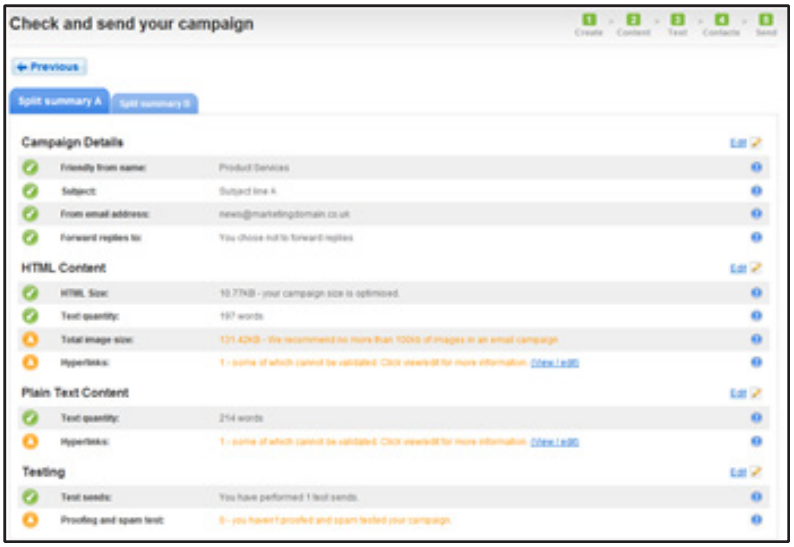
Split Test Quantity - Enter how many contacts you wish to use for the split test. The default setting is 5%. The number of contacts selected here will be split across the different variables you are testing.
Time Delay - Enter in hours how long you want the responses measured for. The default setting is 5 hours.

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

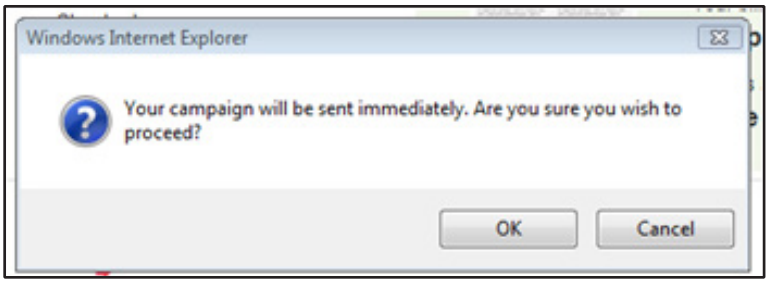
In our example we have used 5 hours and this means that after 5 hours, the balance of our contacts will be sent using the strongest performing campaign.

Metric to be used - Using the drop down, select whether you wish to measure opens or clicks when recording the responses.

When ready click on the **Save & Continue** button. The campaign settings are displayed for you to review. Each set of variables are shown as a different tab:



When ready, click on the **Send Campaign** button at the bottom of the screen. A final warning confirmation is displayed.

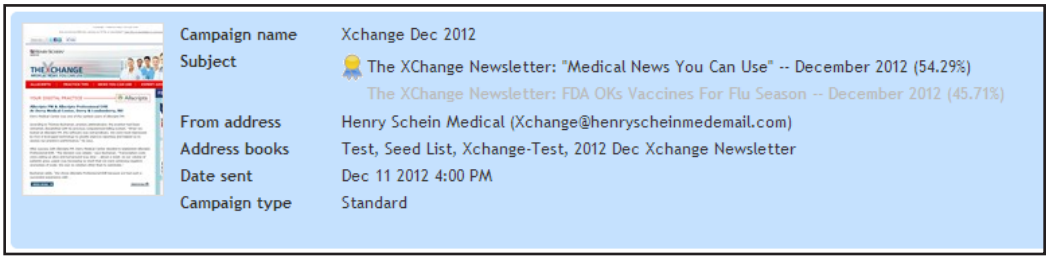


Clicking on the **OK** button will execute the campaign.

The campaign is moved to the **Outbox** while processing occurs and this is shown by the indicator displayed under the **Status** column. Once completed, the campaign will appear under the **Sent** tab.

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

Once your split testing has been completed, the campaign will appear on the Sent tab. You can then review your results in the reporting area in the normal manner. An example is shown below.



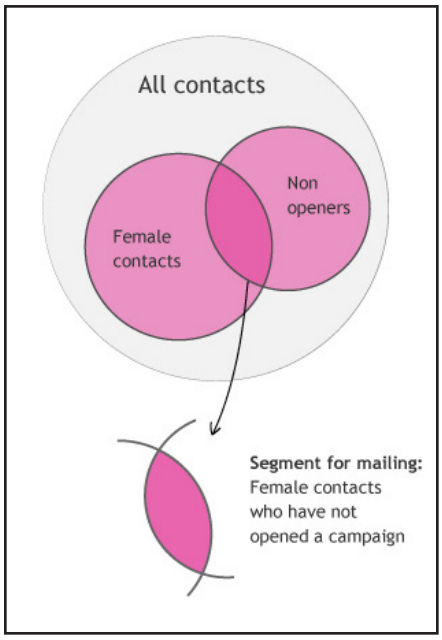
In this particular campaign, two subject lines have been split-tested. The subject line that performed the best is marked with a winning ribbon. 

OpenMoves will send the balance of your campaign after the time gap you entered has elapsed. The campaign will be sent using the subject line with the most success. If both subject lines return exactly the same results, then the email platform will choose the first subject line by default.

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

Segmentation Queries

Good email marketing relies on sending relevant content to your contacts. To simplify the process of finding the right contacts for a campaign, we have two types of lists for managing contacts: address books and segments.



Address books

These are lists of contacts that have been grouped by you. Contacts are added or removed from address books based on actions by you, or by the contacts themselves (as address books can be exposed to your contacts, should you wish, using sign up forms and preference centers).

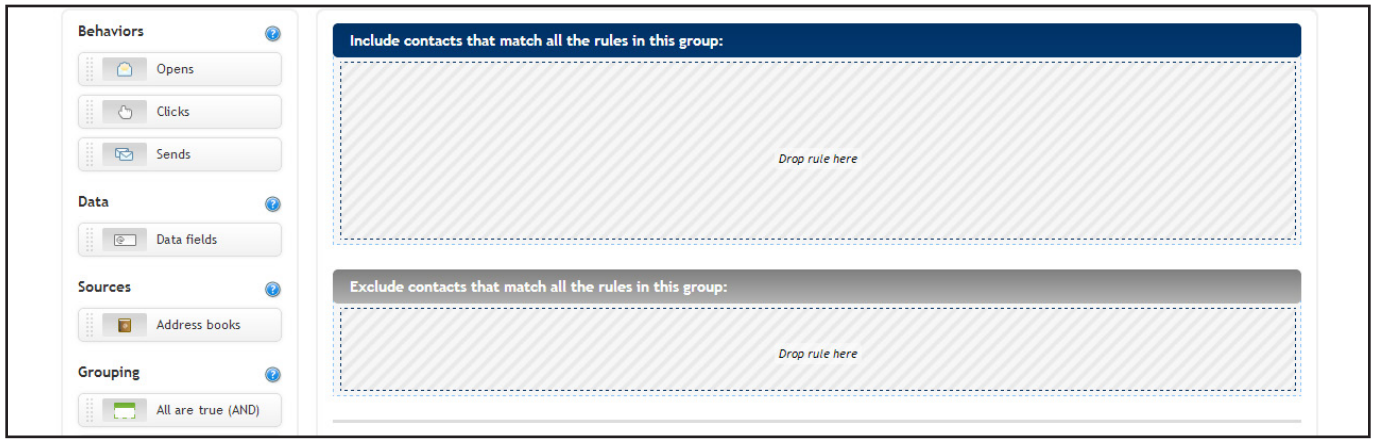
Segments

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

- All female contacts under the age of 25; or
- All contacts living in Seattle; or
- All contacts that have never opened an email campaign
- Or more complicated, such as:

  All female contacts between the ages of 16 and 25, living in Seattle, who have been sent at least one email campaign in the last six months, have not opened any email campaigns in the last six months, are not in the address book 'gap year', and have not been sent any of three re-engagement campaigns.

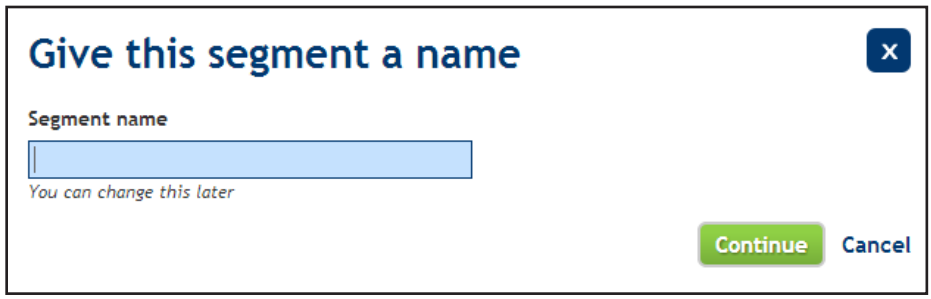
Creating a new segment



1. Create and name your segment

Navigate to the Contacts > Segments. Click on NEW SEGMENT. You will be asked to give your segment a name and to continue.

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779



2. Drag and drop new rules

Segments consist of one or more *rules*. Your segment starts, by default, by including all contacts in all of your address books.

Drag new rules in to the drop area from the left hand column to start building your segment.

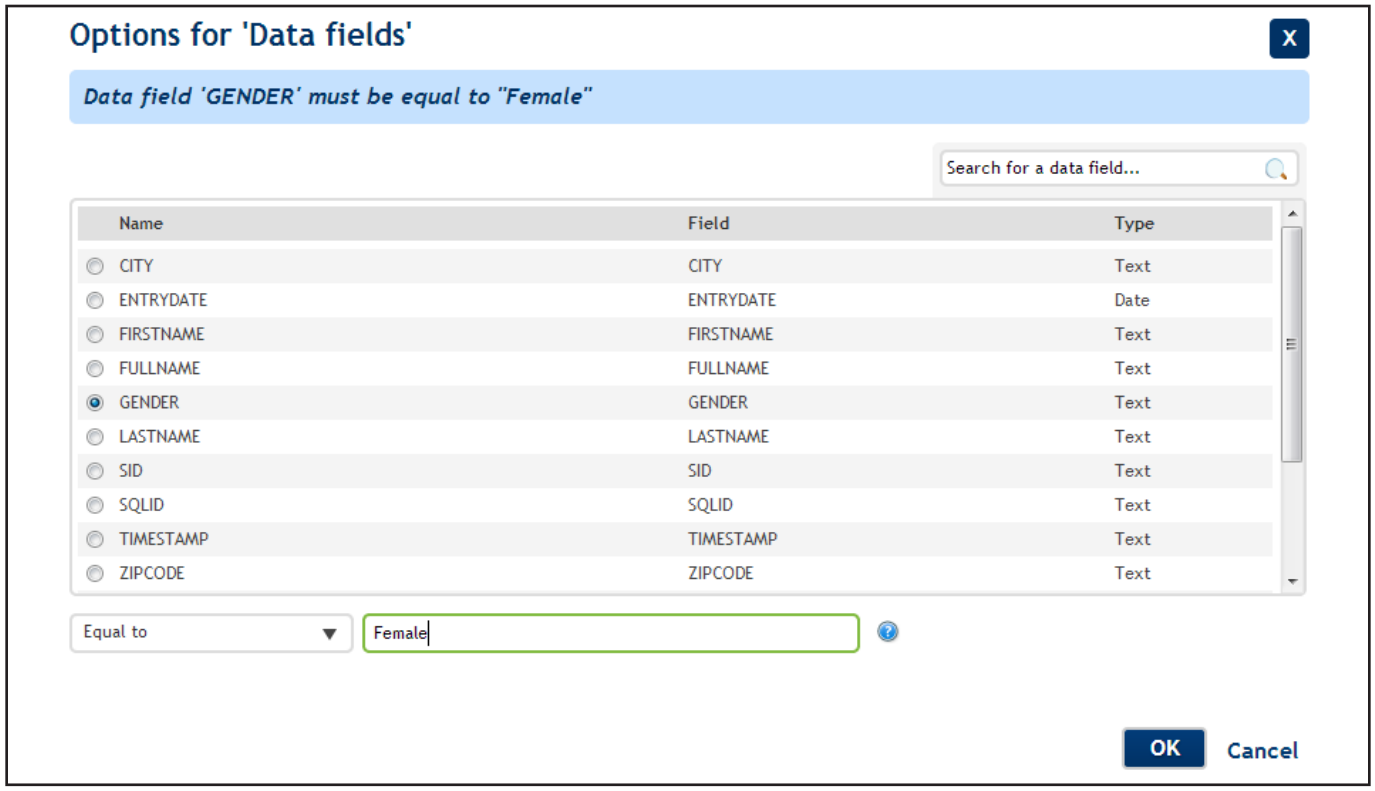
In this example we will drag in a *data field* rule to find female contacts.

3. Configure each rule

Having dragged in a rule you will be prompted to set up the configuration, in this example *click to select a data field*.

This will open a list of options for your rule; select the relevant data field (or campaign, or address book). Based on the type of rule and / or data field selected, you will get additional options at the bottom of the form. In this case, having selected **GENDER**, we are given the option to make it Equal to *Female*. Other options could have been that **GENDER** started with 'F', or was not blank.

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779



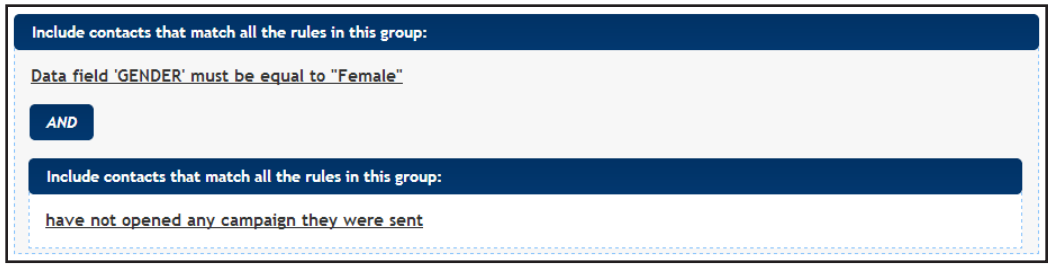
As you build the rule, the subheading at the top of the form will update with a summary of the rule.

Click **OK** to save the rule, or **Cancel** to escape without saving.

4. Group rules together (AND / OR)

As you add rules to your segment they will build up. So when you've added rules for:

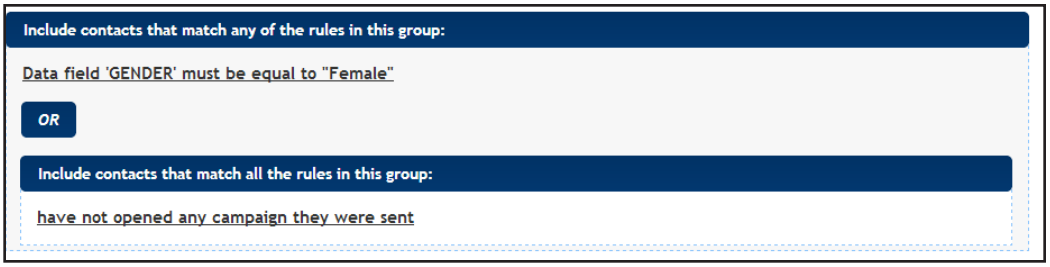
- Data field 'GENDER' must be equal to *Female*; and
- have not opened any campaign



Then only contacts that satisfy both conditions will be found in the segment. Female contacts that have opened campaigns will not be in the segment, and neither will any male contacts.

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

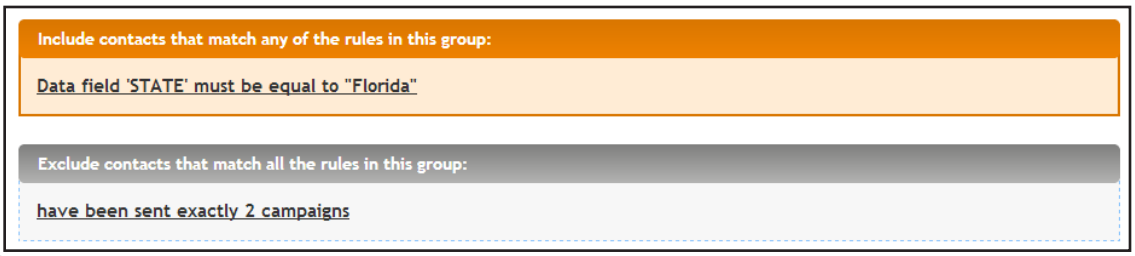
If you wish to have your segment include contacts that match any (and not necessarily all) of the rules, then click the AND lozenge to toggle it to an OR lozenge (you can also click the heading of the group).



By dragging in new AND or OR groups from the left hand menu, you can mix them to form complex segments. For example, by mixing rules and groups you could form a segment that finds all contacts whose state is *Florida* and will also find additional users whose state is *Georgia* or *Alabama* with data indicating their phone numbers:

5. Add specific exclusions

At the bottom of the segments tool, you will see a second drop zone to define contacts that should be specifically excluded from the query.



OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

6. Test your segment

Once you have built your segment, you can preview the number of contacts it will contain by clicking the **Generate count** button in the bottom right corner.

If the number of contacts looks correct, click through the view the contacts in the segment. Otherwise, you might want to review your segment rules.

Converting segments into address books

Once you have created a segment that you don't wish to update, you can convert it into an address book. Simply select the segment created, click on **More actions…** and select **Convert to address book**. This will instantly create a brand new address book composed of just this segment. You can also copy a selected segment into one or more of your existing address books by clicking on **More actions…** and selecting **Copy to address book**. By doing either of these, you also avoid adding to your segmentation allowance.

Working with segments

Some segments will be updated based on real time data; that is, whenever you use or view the segment, it will always contain the correct contacts based on your rules.

However, if your segment contains rules to do with *Open* or *Click behavior*, then it will need to be refreshed before it shows up-to-the-minute information.

Segmentation rules can be based on the following:

- Address books
- Data fields
- Clicks
- Sends
- Opens

Using your segmentation query with a campaign

To send a campaign to the segmentation query you have created, move back to your Campaigns list and click the send icon alongside the required campaign. You are prompted to select a data source and the default view will be your Address Books tab.

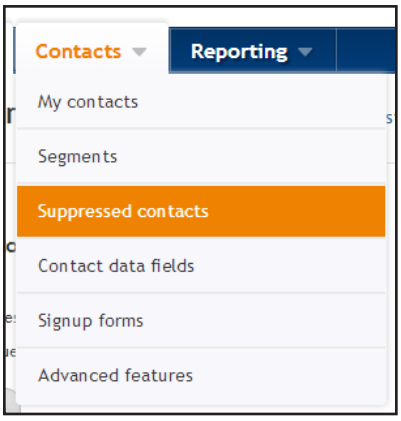
Select the Segment tab and any queries created will appear in the list. Check the box next to the segment you want to send to. You may select more than one.

Click on and process your campaign as usual.

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

Suppression Lists

The **Suppression Lists** functionality within the email platform allows you to manage both suppressed contacts and domains, manage your bounce thresholds and even process contacts against the **OpenMoves Global Suppression List**.



Select **Contacts** from the navigation menu and then **Suppressed contacts** from the sub-menu that appears. The **Manage suppression** lists screen is displayed which consists of five tabs.

Suppressed contacts

The **Suppressed Contacts** tab displays a list of all your contacts who have unsubscribed from your communications plus those who have been automatically unsubscribed by reaching their bounce threshold or registering an ISP Spam complaint.

Email	Email Type	Date removed	Reason suppressed
danrobsmithh@gmail.com	Html	Jun 15 2012 2:30 PM	Hard bounced
gerrm214@yahoo.com	Html	Jun 15 2012 2:30 PM	Hard bounced
wjones@bellsouth.net	Html	Jan 23 2013 2:14 PM	Unsubscribed
jeff.oreill@hp.com	Html	Jun 15 2012 2:30 PM	Hard bounced
msquaredtx@gmail.com	Html	Dec 11 2012 3:12 PM	Unsubscribed
JoiCodeTest@email.com	Html	Jan 23 2013 2:00 PM	Hard bounced

You can manually add a contact to this list by clicking on the **ADD NEW** button.

Suppressed domains

The **Suppressed Domains** tab displays a list of all domains that have been suppressed. By adding suppression at a domain level, all email addresses in your address books for that domain are automatically suppressed. This saves you a lot of time when a company asks to be removed as a whole from your lists.

To add a new domain to this list, click on the **NEW DOMAIN SUPPRESSION** button.

Bounce thresholds

Selecting the **Bounce Thresholds** tab displays the following screen.

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

A **bounce threshold** represents the number of consecutive times an email campaign delivery is allowed to fail due to soft bouncing, before that email address becomes unsubscribed.

A **hard bounce** is an email message that has been returned to you because the recipient's address is invalid. A hard bounce might occur because the domain name doesn't exist, the recipient is unknown, or there's some type of network problem on the recipient's end. The default setting is 1 and we do not recommend this setting being altered as this can affect your deliverability.

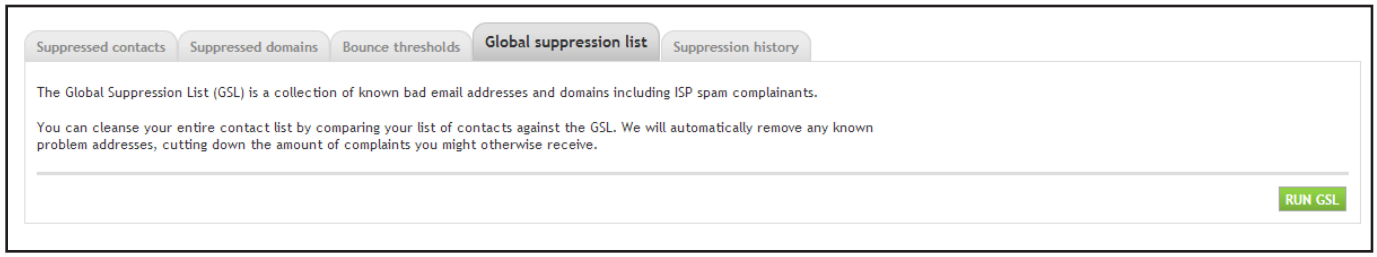
A **soft bounce** is an email message that gets as far as the recipient's mail server, but is bounced back before it reaches the recipient. One of the most common causes for a soft bounce is a full mailbox. This may happen with your subscribers who use free e-mail services like Yahoo and HotMail, because they allow for very little email storage. The default setting is 3 and this can be changed by either entering a new number or using the slider control. If you never wish to unsubscribe soft-bouncers then check the box next to **Never suppress soft-bouncers**.

Once you have set your thresholds, click on the **UPDATE THRESHHOLDS** button.

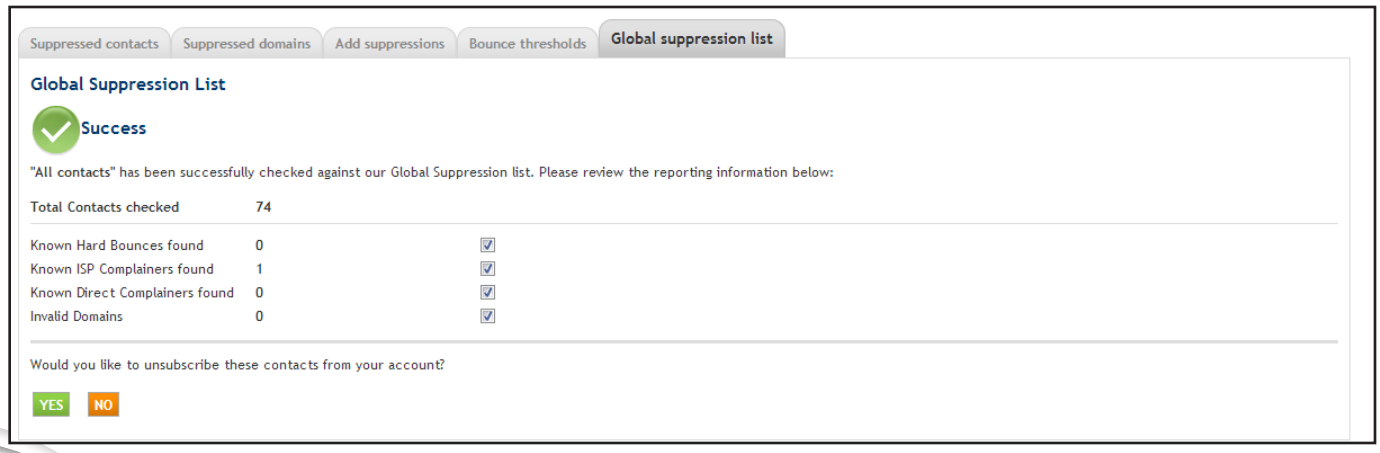
Global Suppression List

This function enables you to cleanse your entire contact list against the Global Suppression List. The **Global Suppression List** is made up of hard bounces, complainants to ISPs (Hotmail and Yahoo, etc) and inbound (ie. telephone) complaints, from across all OpenMoves client accounts.

Selecting the Global Suppression List tab displays the following screen.



To execute this function, click on **RUN GSL**. Your contacts are compared and the following report is generated. To unsubscribe the resulting contacts, click **YES**. To cancel, click **NO**.



OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

Public and Private Address Books and Contact Data Fields

Within OpenMoves you can specify whether an address book or contact data field is **public** or **private**. This status determines whether or not an email recipient can view, add and update information when they are unsubscribing or editing their details.

Address Books – if you make an address book public, you can avoid mass *unsubscribing* by enabling your contacts to choose which of your campaigns and communications they wish to subscribe to or unsubscribe from. If the address book is private then only the account holder can access or update this information. **BE CAREFUL** – your email recipients will be able to see the names of all *public* address books displayed in their list. Take care when specifying the name of each address book.

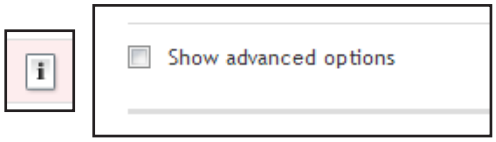
Contact Data Fields – if you make a contact data field public, you can allow the contact to view, add and amend the data you collect about them. If the contact data field is private then only the account holder can access or update this information.

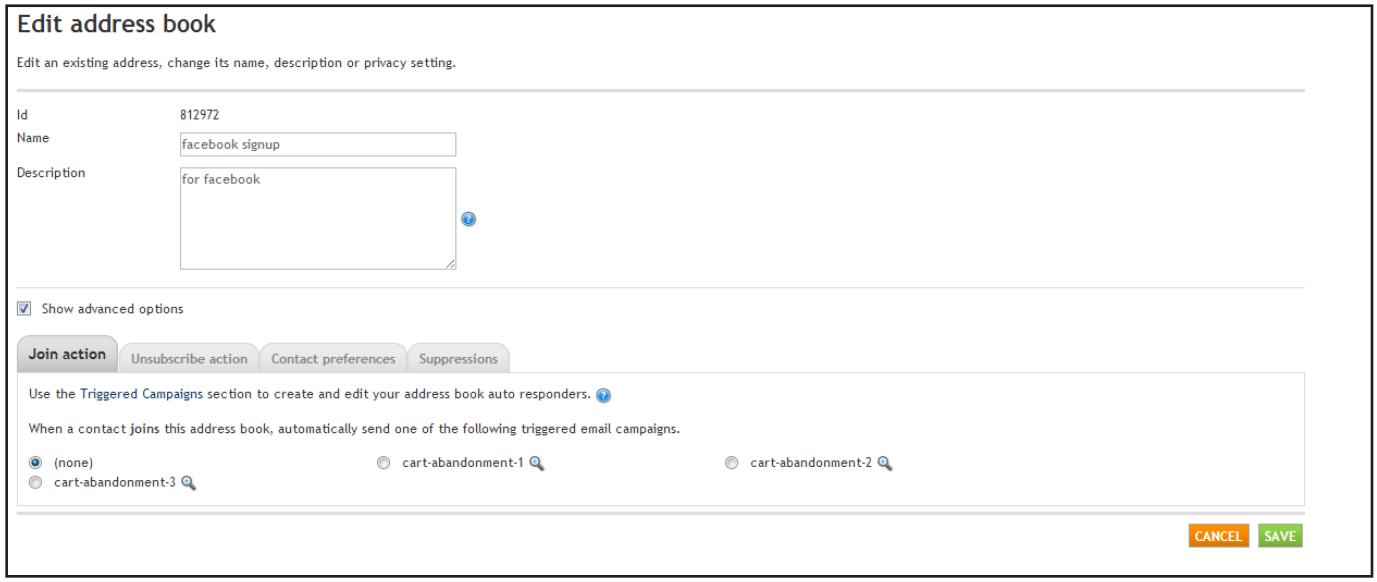
When you create a new address book or a new contact data field, the status is always set to private by default.

Setting an address book as public.

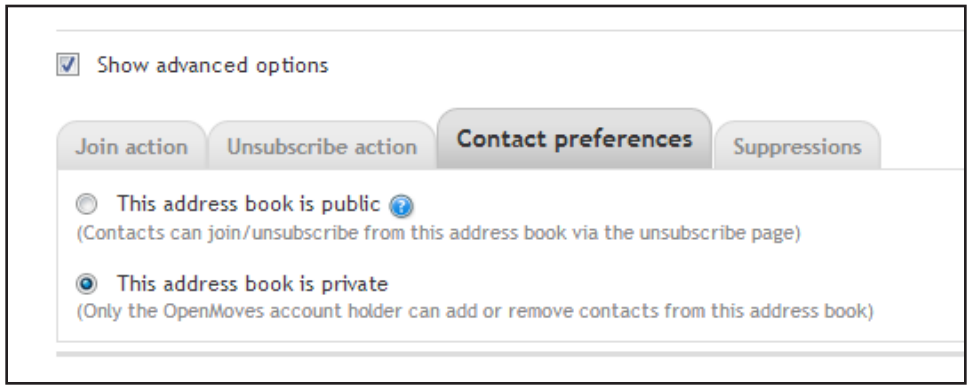
Create your address book in the normal manner, giving it a unique name and entering a description. **REMEMBER** – your contacts will see the name of this address book so give it some thought.

After your have created the list, click the **Properties icon** and then click on the **Show advanced options** checkbox and a series of tabs are displayed.





To set this address book as public, select the “Contact preferences” tab.



The default setting is private. Click on the radio button next to **This address book is public** and click the properties icon.

Setting a contact data field as public

Create your data field in the normal manner, giving it a unique name. REMEMBER – your contacts will see the name of this data field so give it some thought.

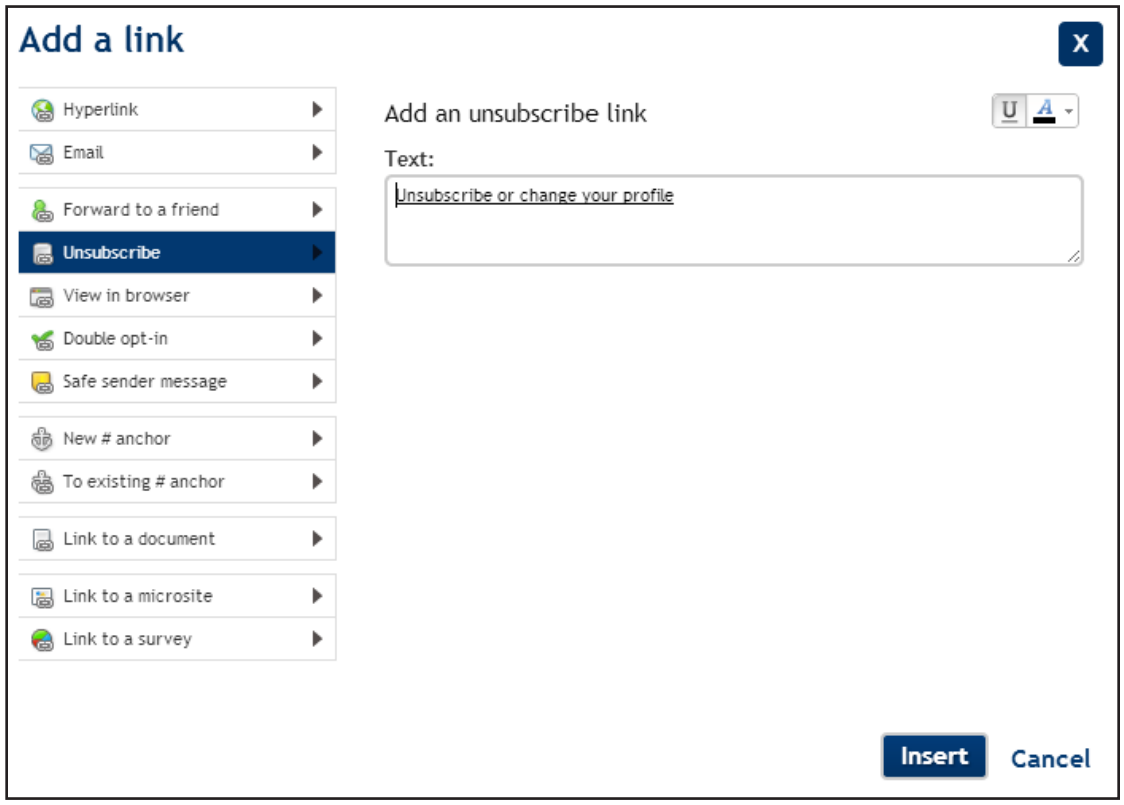
The default setting is private. Click on the radio button next to **This data label is public** and click on Save.

To change a data field already created, go to your Contact data fields list and use the **Property icon** to edit the setting.

Using public address books and contact data fields in your campaigns

Your contacts access public address books and contact data fields by using the *unsubscribe or change your profile* link that you put in your email campaigns.

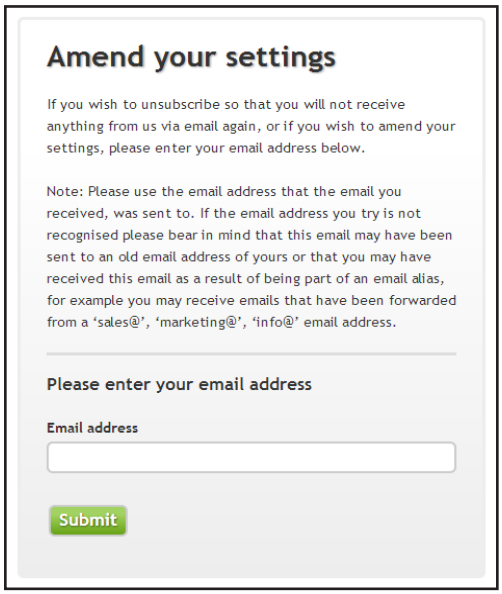
To insert an *unsubscribe* link this, create or edit your campaign in the normal manner, using the **link** tool to insert the *unsubscribe* link into your template.



The *unsubscribe or change your profile* text lets your contacts know that this link can be used not only for unsubscribing from your campaigns but can also be used to change their details.

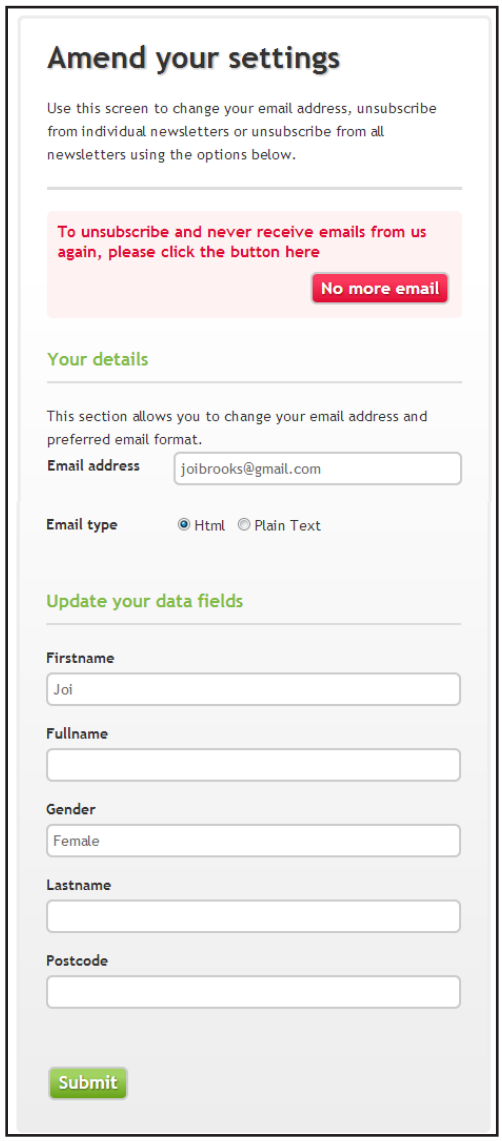
OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

Proceed with your campaign creation, testing and sending in the normal manner. When your recipients click on the link they are presented with the screen to the right.



The contact enters the email address that the email was sent to and clicks on the Submit button.

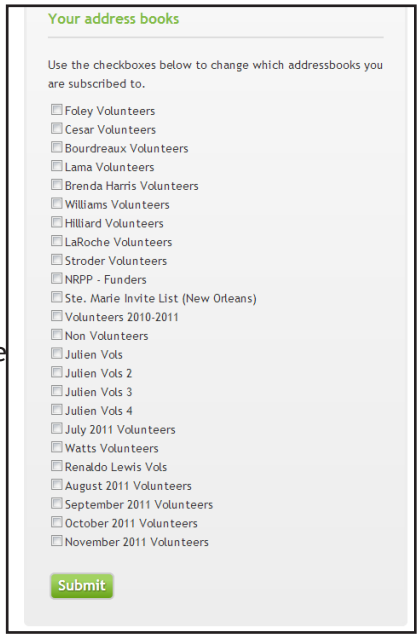
The following screen is now displayed to the contact.



If the recipient does not want to receive any more emails from you then they simply click the **No More Email** button.

Within the *Your details section*, the contact can edit not only their email address and preferred email format but also any custom data fields you have set as public.

If there are multiple lists, then within the *Your address books* section, the contact can see the communications they are subscribed to. They can subscribe or unsubscribe by using the checkboxes alongside each address book.



If they check a box they are not currently subscribed to, for example: *Monthly Newsletter*, then OpenMoves will automatically update the relevant address book with the recipient's email address.

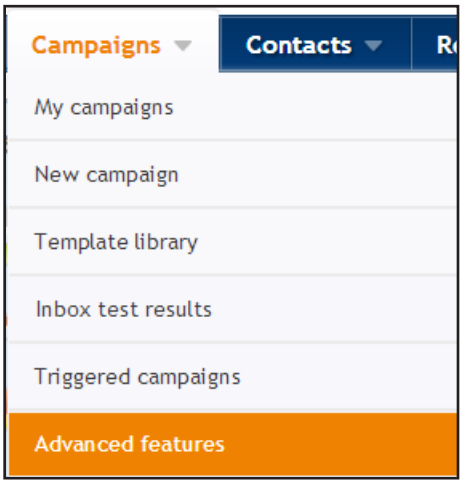
The contact clicks on the **SUBMIT** button to save any changes and leave this screen.

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779

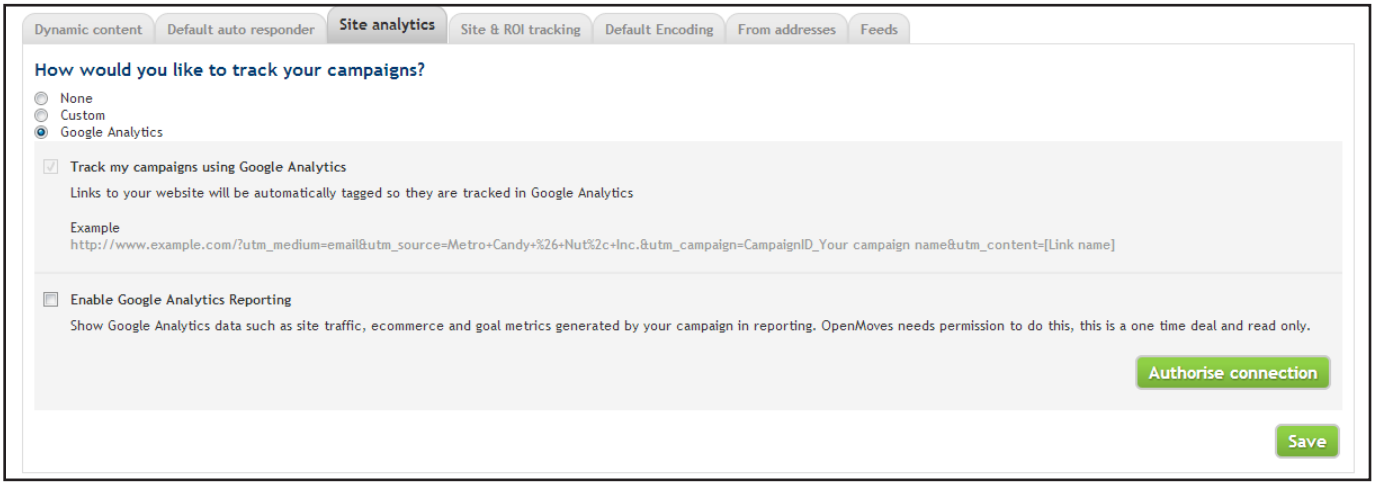
Site Analytics

OpenMoves can automatically add Google tracking code to your email link URLs.

To access Site Analytics, select Campaigns > Advanced Features from the sub-menu that appears.



Select the **Site Analytics** tab



To enable Google friendly links, click the checkbox.

The querystring is generated for you. Now click on **SAVE**.

If you would like to see your Google Analytics reporting data within OpenMoves, click the checkbox to **Enable Google Analytics Reporting** (*provided option for Enterprise level OpenMoves customers*).

OpenMoves | 16 Gaines Place | Huntington, NY 11743
www.openmoves.com | info@openmoves.com | 631-546-7779