



## ***Quick Start Guide V1.3***

This document is intended as a useful supplement for users who have taken part in an Etelligent training course. It does not replace proper training.

Additional help can be found in Etelligent's built in help system and via our Knowledge Base, located at:

<http://www.colony101.co.uk/clientportal>

Technical support can be obtained via the Help Desk at the same website or, if the issue is urgent, via: (01323) 645 646

The Help Desk is available Mon-Fri between 9am and 5pm, excluding public holidays.

## Opening Etelligent

### 1. Logging into Etelligent

Customers using the ASP service should access the Etelligent system via the following website address:

<http://www.colony101.co.uk/clientportal>

This gives you access to your account and also support options.

NOTE: In certain instances you may have been given a special address to access your system. If that is the case do not use the above URL.

You will then be asked for the following information:

The image shows a login form for the Etelligent system. At the top, the word "ETELLIGENT" is written in a stylized font, with "E" in red and "TELLIGENT" in black. Below this, there are three input fields: "Client Code:", "User Name:", and "Password:". Each field is a white rectangle with a thin border. Below the "Password:" field is a blue "Submit" button with white text. The entire form is set against a light green background with a subtle gradient and rounded corners.

If you have lost your user name or password, please contact the Help Desk.

### 2. Email Marketing

When you enter the site please select the EMAIL MARKETING tab from the left-side navigation panel (if this menu does not automatically open).

### 3. Screen Display

When you have selected Email Marketing you will open up the main navigation options in the left-side navigation panel. In the main (right side) panel you will see a graphical display of your marketing campaigns and any previous messages, templates, webpages, or SMS messages.

By default, your campaign folders will in a closed state. Clicking on a campaign's name will reveal its contents. Clicking on an item inside a campaign folder will display a preview of it in the right-side frame.

*Note that all menu options in Etelligent are context dependant. What you see depends on exactly what you are doing. Before you start editing something in the right-hand panel you should ensure that the left-hand navigation panel has finished refreshing. This should not take more than one or two seconds.*

### 4. Home Page

If you loose your place in Etelligent, or simply to bring you back to familiar territory, you can press the Campaigns/View Campaigns option in the left-side navigation. This will bring you back to the same screen that you see after going into Email Marketing.

## Preparing your email

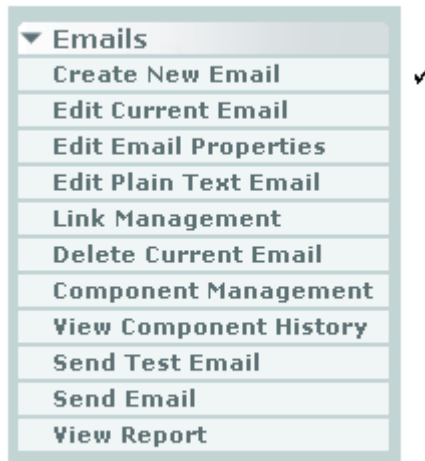
### 1. The Basis for you new email

In Etelligent a new email is always based on either a template or a previous email that you have prepared. Indeed there is nothing really special about a template – it's simply an incomplete email. In this documentation for simplicity it will be assumed that you always use a template as the basis for a new message.

Open up the template by clicking on its descriptive name, this will allow you to confirm visually that you have selected the correct template.

### 2. Creating a new email

With the preview of the template in the main display, take Emails/Create New Email from the left-side navigation.



The screen that appears is shown on the following page.

Most of the information you need to provide when you create a new email is defaulted and under normal circumstances you should not need to change it. Do not change the 'From' and 'Reply to' addresses without consulting the Help Desk to be made aware of the full implications of what you are doing.

The information that probably will want to change is:

**Subject Line** – This is what the contact will see when the email appears in their email in-box.

**Title** – This is the internal name of the message. It is common for all emails in a campaign to go out with the same subject line (e.g. “Etelligent Newsletter”). It is the email title that allows you to distinguish between them in this situation. The contact will never see the email title.

**Parent Campaign** – The drop down allows you to select the campaign folder that the message should be kept in. You are advised to use Campaigns in the same way you would use folders to organise your files on your PC.

Having supplied this information, and pressed submit button the new email will be created.

### Add New Email

Subject Line *	<input type="text"/>
Title *	<input type="text"/>
Parent Campaign	Campaigns <input type="button" value="v"/>
Template	Email with Header and Footer <input type="button" value="v"/>
Style Sheet	Mail Template 01 <input type="button" value="v"/>
Components	<input checked="" type="radio"/> Copy editable components from current page or template <input type="radio"/> Add blank editable components
Background Colour	# <input type="text"/> 
<b>Default Values</b>	
From Address *	ETELLIGENT <etelligent@emarketing.e
Reply To Address *	ETELLIGENT <etelligent@emarketing.e
Salutation *	Subscriber
Character Set	iso-8859-1 <input type="button" value="v"/>
Stop Dedube on Send	<input type="checkbox"/> When Etelligent sends an Email it deduplicates the recipient list by email address to ensure that each address is sent only one email. Tick this box to stop deduplication.

### 3. Preparing the Email

One way to ensure that you perform all the tasks required prepare the email is to work through the left-side navigation in order. You will need to take the following options



### 4. Editing the Email

When you take the Edit option the email is displayed to show the various message components – we commonly call this the “structure view”. There may be just a single component or there may be several depending on the design of the message.

The message is edited one component at a time. To edit a component click on the ‘Edit’ link at the top right of the display.

You may use the “(< >)” link to by-pass the Etelligent editor and directly edit the HTML source code. *This is an advanced option intended only for users with an advanced knowledge of HTML who additionally have taken part in an Etelligent developer training course.*

### 5. Email Properties

You can use this option to change, for example, the subject line of your email.

### 6. Edit Plain Text

An email message needs to have a plain text equivalent version. This should be done after you have finished your HTML version, to save you making changes to two documents. You will see that there is an option to automatically create a plain text version of your message. This function will suck in all of the text and hyperlinks from your HTML message and you will then need to tidy up the layout.

### 7. Link Management

Here you will see a list of all the hyperlinks that you have used in the message. All these links are automatically tracked without you doing anything special.

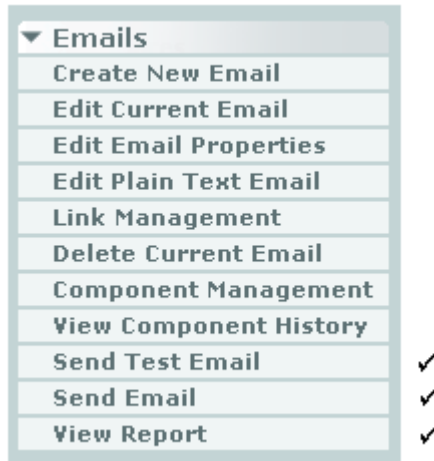
You can however change the ‘descriptive’ name for the link so that when you view the reports on a message it is easier to understand.

*Tip: Do not make your hyperlinks out of “click here” text. If you hyperlink text describing what it links to then it will stand out in your email and you will get more clickthroughs. Additionally, Link Management will pull in this text and automatically name your tracked links for you.*

## Sending your message

### 1. Steps

The following menu options control sending the message, and reviewing the reports.



### 2. Testing

You need to make sure that your message displays correctly, and that all your links work by making performing test sends before you broadcast it to a large number of people. You can then make any adjustments that are needed using the editor.

When you select 'Send Test Email' the following screen will appear:

The screenshot shows two forms. The top form is titled 'Send Test Mail' and contains three input fields: 'First Name', 'Last Name', and 'E-Mail \*'. Below these fields is a button labeled 'SEND TEST >>'. The bottom form is titled 'Send Test Email' and contains a 'Test Filter \*' dropdown menu, a 'Text Only' checkbox, and a 'Submit' button.

You can either enter the name of a single person who is to receive the message in the top half of the screen OR select a predefined 'testing group' from the drop down in the lower half of the screen.

The 'Text Only' check box applies to both a single send and to the testing group.

**For more information please refer to the Etelligent On-Line Help text**

### 3. Live Send

When you take the Send Email option the following screen will appear.

**Send Email**

Select Filter \*

Schedule Date & Time  /  /  :

**Post Send Actions**  
There are no 'SEND Actions' associated with this MAIL.

You will need to select the Filter - this defines the audience to whom your message will be sent. Filters are pre-defined in the 'Contacts' area.

You can also set the date and time for the when Etelligent should start to send the message.

## Managing Contacts

### 1. Introduction

When you use the ‘Contacts’ options in the Etelligent system you can:

- Modify the structure of the database
- Look to see who is in the database
- Manually add a database record
- Bulk upload contacts (from a properly formatted Excel spreadsheet, CSV file, or Access database)
- Download data from Etelligent

### 2. Database Structure

In Etelligent you can modify the fields of data that you hold for each contact. When first set-up the installation will have some limited fields on the contact record. You can add more.

For example, you might add a ‘Contact Type’ field to distinguish between different kinds of contact. When you add a new field you need to choose an appropriate data storage type. If you are unsure about what data type to use please contact the Help Desk.

<http://colony101uk.helpserve.com>

### 3. Filters

It is by specifying a filter that you can define a target audience.

When you add a filter you give it a descriptive name and also specify the ‘type’. You then need to add the conditions in the filter.

Here is a sample filter that will send to all people in the contacts list.

**Create New Filter**

Filter Name: All Contacts

<b>Clause 1</b>	<input type="text" value="email Contains The Text @"/>	<b>Add Condition</b> <b>Edit Selected Condition</b> <b>Delete Selected Condition</b>
<b>Add Clause</b>		<b>Show Filtered Contacts</b> <b>Filter Summary</b> <b>Delete Filter</b>

### 3. Uploading Contacts

The most common way to bulk upload contact data into Etelligent is by using a spreadsheet.

Here are some guidelines

- Make sure that you use a simple spreadsheet with a column name in the first row and no fancy formatting.

**For more information please refer to the Etelligent On-Line Help text**

## **Etelligent Quick Start Guide – V1.3**

- Do not include any cells that are calculated by a formula.
- Do not include any blank rows or 'subheading' rows.
- Remove any 'funny' data – for example in the email column you must just have a single email per row.

More information on preparing your spreadsheet can be found in our online Knowledge Base at:

<http://colony101uk.helpserve.com>

The steps to uploading data are

- Browse for the spreadsheet containing the contacts.
- Upload the spreadsheet to the Etelligent server.
- Match the column heads in the spreadsheet to the database names used by Etelligent.
- Specify the actions to be taken if the contact already exists, and how Etelligent is to check whether or not the contact already exists.