



SOLUS-MAILER

Abstract

Solus-Mailer offers the following functions :

1. The creation of the email message to be sent out. In this message a number of hyperlinks to urls and/or questionnaires can be incorporated (as well as images for that matter). This message is being compiled in Word and (out of Word) being saved as a type .html document.

2. The composition of the 'addresses' file.

The essential element - for each entry - is of course the email address. In the same row, other elements can be added (e.g. title, name..). These elements can be injected anywhere in the text of the email or into the hyperlink (e.g. login, values to be seeded into the questionnaire...). This file is created in Excel, out of which it is being saved as a .csv type file.

The files created sub 1 and 2 are being stored in a zip file, that will be uploaded to the solus-mailer server.

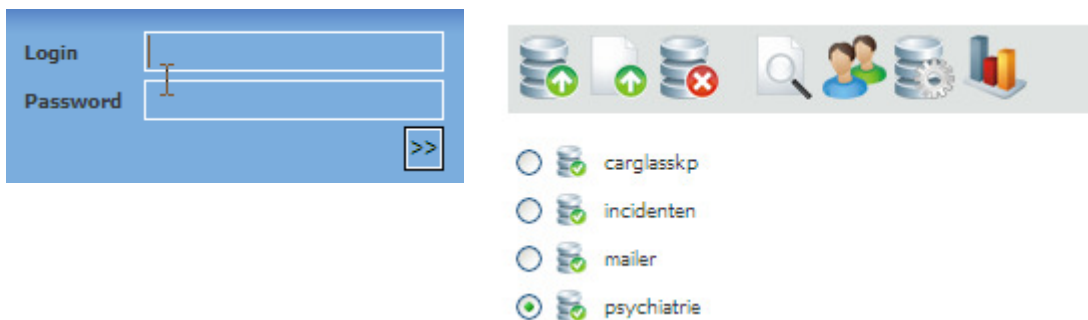
3. Sending of the emails to the destination addresses.

4. The reporting of the reaction by the receivers of the message, i.e. who/when has opened it and who has when clicked on which hyperlink. Specifically for Snap questionnaires, the reporting will also list all email addresses that have NOT responded (not clicked on the submit button) to the questionnaire. This information allows you to easily create a 'negative' list of people to whom you may possibly send out reminders.

Your access to Solus-Mailer

You receive a login and password that allows you to log in on the solus-mailer server. The link = <http://mailer.solussnap.be/?doc=home.php>

On the left side you enter your login data and click on the arrows.



On the right side of the screen you see the picture like above, containing a list of current projects. Above it, a series of icons (with some explanation opening up when you hover the mouse above them). Each icon's function is explained in point 3 of Running a project, i.e. How to use Solus-Mailer. (There are a few more unimportant icons: they are described at the end of this document).



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At execution time, you will use the icons in the sequence from left to right.

Running a project.


1. Compile an email message

You use Word with all its features (you will indeed create an html message, not a 'plain text'-message, so colours, underlines, images...are all possible). In particular, you can select a text and by using 'insert hyperlink', you can attach a hyperlink to an url-address (see figure).

Geachte {aanspreking} {naam},

Doe mee aan onze bevraging!

Klik daartoe op **vragenlijst**

After selection you choose  and enter the corresponding address

Address:

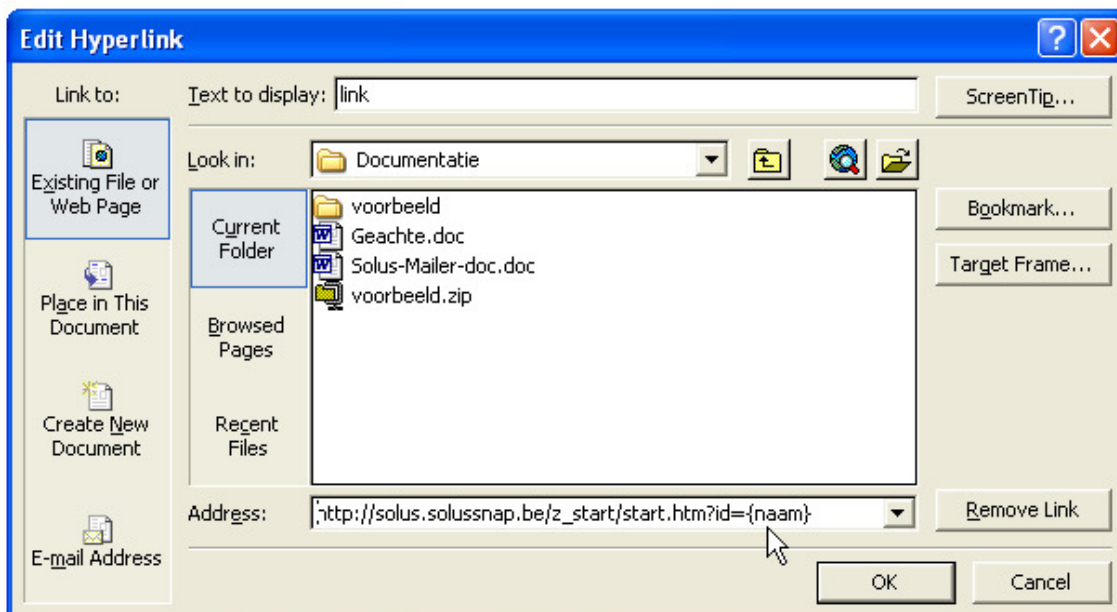
Between { } you enter the **exact** name of the column heading that you will use in the excel file containing the receiver-data. Such injection is ALSO possible within the url-link.

Note : Word will automatically recognize an url-address (and underline it). This mostly works ok, but please do use the Insert hyperlink procedure always, definitely when building a hyperlink that includes column headings (see figure below):

Geachte {aanspreking} {naam},

Klik op www.snap-benelux.be

Klik op [link](#)





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Subject of the email message.

There are 2 ways for creating the Subject line:

- you use the first line in the document as subject. Word will automatically use this line as 'name' of the document.

- you use the Word-function File>Properties and enter the text in 'Title'.

NOTE : in docx use File>Info, then enter Title !

Information about mailervoorbeeld
C:\Administrator's Documents\Snap10\Demo-vragenlijsten\Email\mailervoorbeeld.docx

Permissions
Anyone can open, copy, and change any part of this document.

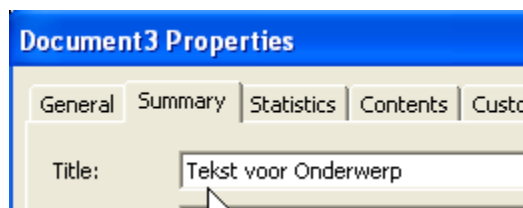
Prepare for Sharing
Before sharing this file, be aware that it contains:

- Document properties and author's name
- Custom XML data
- Content that people with disabilities are unable to read

Versions
There are no previous versions of this file.

Properties

Size	17,6KB
Pages	1
Words	13
Total Editing Time	33 Minutes
Title	Doe mee aan onze bevraging
Tags	id a tag
Comments	Title Doe mee aan onze bevraging
Related Dates	
Last Modified	Today, 13:14
Created	Today, 8:32
Last Printed	Never



The 2nd way allows you to make a distinction between the name of the Word file and the Subject of your email message.

Important comment: ALWAYS insert an image anywhere in your text. Here is why: The receiving emailprogram (at the receiver's end, most probably Outlook) will send a signal to the server to download the image(s). Most often, this is being done automatically, but sometimes the receiver needs to confirm his authorization. This is the **only** way allowing the server to know that someone 'opened' the email.

Once the email message is ready, you must also save it as a html-document, under the **name of your project. Put this html-document, together with the automatically generated folder _files (images) in a folder having also the name of the project.**

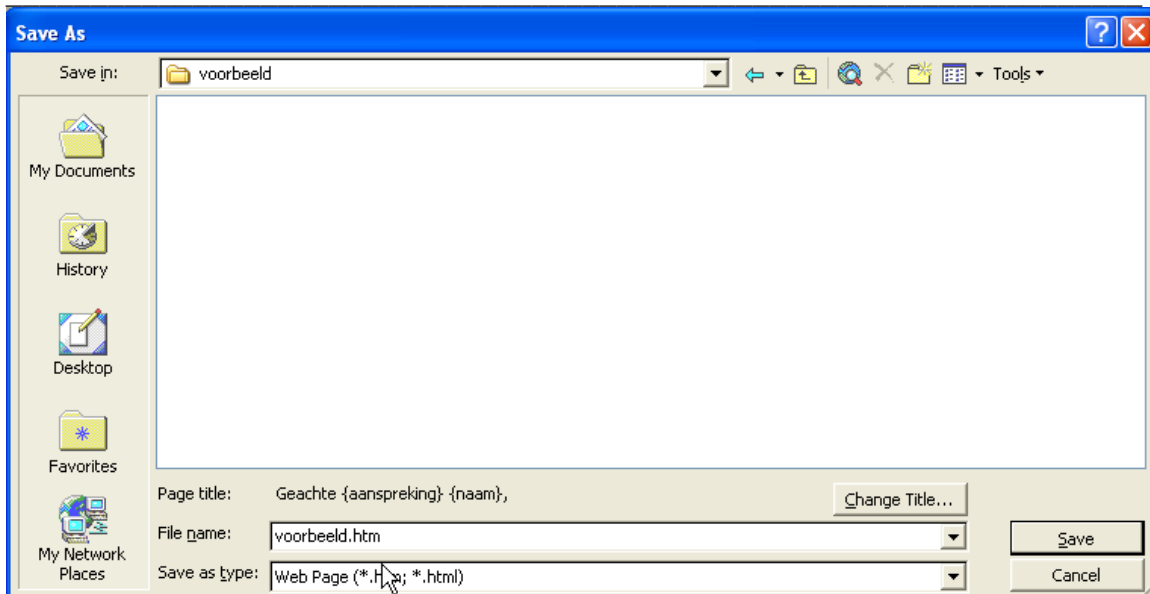
Example : you create a project 'voorbeeld'.

Create a folder 'voorbeeld'.

In this folder, save the html-document having the name 'voorbeeld': see below.



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NOTE: in docx always save as FILTERED htm/html

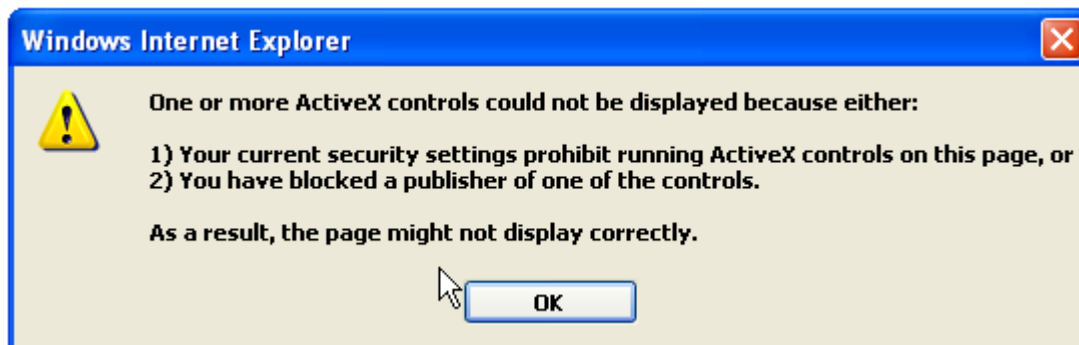
After the 'Save' you have in folder 'voorbeeld' one subfolder (_files with the images) and the html document (see below). Next, we will also put a csv-file in this folder.

.administrator\My Documents\Snap10\Demo-vragenlijsten\Email\Documentatie\voorbeeld



Caveat : potential problems in in Word.

Experience has shown that some 'special' characters (typically 'accents') may lead to 'bad' codes in the email. This problem generates a warning message that pops up when opening the email. After the OK, everything rins fine, but it is a bit 'unpleasant' for the receiver of the email.



In order to avoid such phenomenon, you may do like this:

- retype the text by hand (in order to avoid bad invisible characters to be introduced by the copy/paste operation). Do NOT use numbering/bullets because apparently they generate 'info-tags' causing this problem).



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- terminate each line in Word (72 characters) with a real ENTER. The phenomenon described above never occurs in 'short' lines.

2. Create a .csv-file containing the receiver data

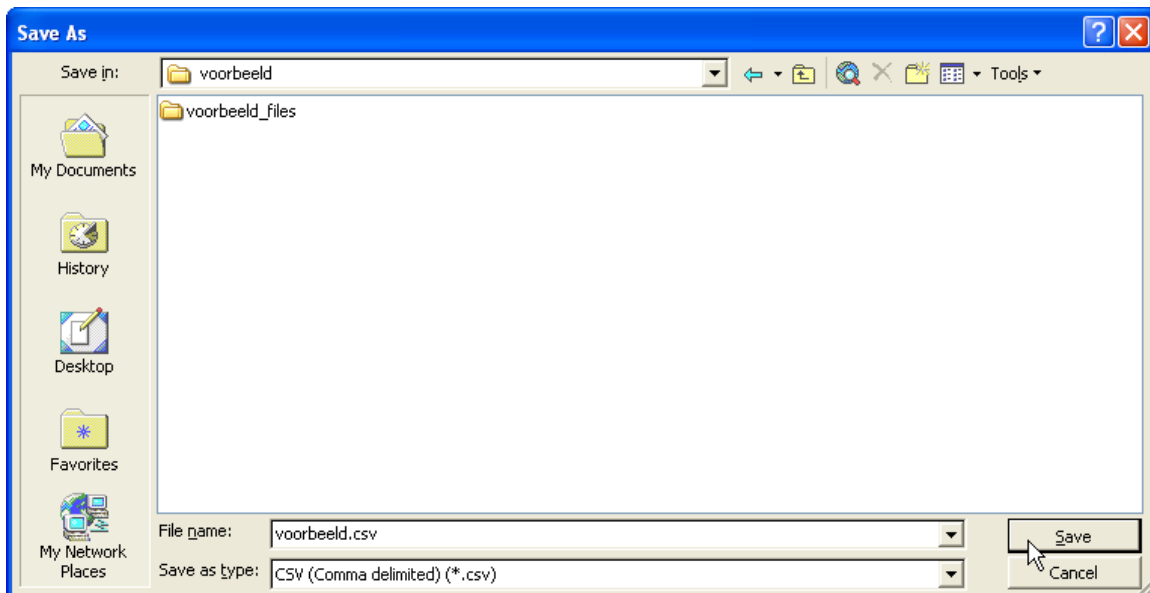
Build the receiver data in Excel. First you put the column headings in row 1 with MINIMUM 1 heading 'email'.

This column holds the email addresses.

	A	B	C
1	email	aanspreking	naam
2	solus@skynet.be	heer	Schreurs
3	solus@solusnap.be	mevrouw	Solus
4			

Save this file as a .csv file and put it in the mentioned projectfolder giving it the SAME name as the html-document (hence here also voorbeeld.csv).

Note : when saving it as a .csv-file, Excel will often ask your 'OK'.
So, PERSIST !



Finally, within projectfolder 'voorbeeld' you will have this situation:

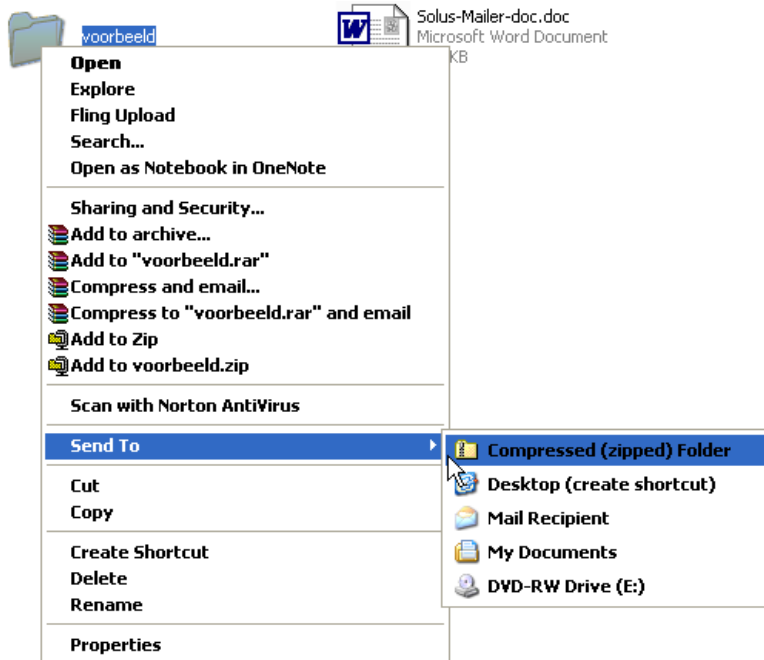
Administrator\My Documents\Snap10\Demo-vragenlijsten\Email\Documentatie\voorbeeld



Now, you need to save this projectfolder (here 'voorbeeld') in a zip-file (= dataset) again having the SAME name (here voorbeeld.zip). This happens automatically when you apply this windows-function: select the (project)folder ('voorbeeld'), click right and choose Send to compressed (zipped) folder (see figure).



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At the same 'level' as the project folder 'voorbeeld' is now voorbeeld.zip created.



Ultimately you now have your dataset ready in this zip-file.

Now it is time to go to Solus-Mailer.

3. How to use Solus-Mailer

Establish the connection with Solus-Mailer.

The link = <http://mailer.solussnap.be/?doc=home.php>

Use the icon fully at the left.



upload dataset : to upload a set of files sitting in a zip.

With the Browse-key you look up the zipfile and click on Upload.

When the files are correct, Solus-Mailer will add the project to the list of projects.

For all other icons, you will need to select the project before using the icon.

You may do the upload in steps, by using the following icon:



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upload single file : to upload only one file (first select a dataset, into which the file will be uploaded)



delete dataset : to delete an existing dataset

With the following 2 icons, you can separately look at either the email message or the receiver's list, in order to correct some data before sending.



preview mail : to preview the message prior to sending it



preview recipient's list : to control the future receivers prior to sending

The final sending of the emails is done with the next icon.



process sending dataset : starts the sending.

The emails have now been sent.

It is now important to handle the follow up. This is done with the next icon. It makes you choose between 4 formats.



show logs for dataset : to look at the statistics after sending

Here are the 4 possibilities :

Statistics

- Export logs to Excel
- Export logs to CSV
- HTML statistics
- CSV analysis

De first 3 choices are obvious.

(note : sometimes Explorer IE8 will give an error message when choosing the Excel option and then 'Save': it is not clear why. If need be, use a different browser). In June 2011 the error message disappeared in IE 8

For the first 2 you will see the following information either in excel or in csv:

action	timestamp	dataset	user	link
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action= SEND, READ, CLICK : this is the type of action described in the record.

SEND = the action by the server to send the email

READ = the action by the receiver to open the email

CLICK = the action by the receiver to click on a link

timestamp= day and time of the action

dataset= the name of the dataset

user= the email address of the receiver

link= (when CLICK): the link on which the receiver has clicked.

HTML statistics shows a statistical overview of the actions.

The last choice shows a brief overview.

It is with this choice that we are going to detect WHO has NOT (yet) clicked on the Submit button (at the end of a Snap questionnaire) in case an url linked to a Snap html-questionnaire.

The only prerequisite for such follow-up is to insert 'somewhere' (e.g. in the Title) the declaration of javascript mailer-feedback.js

Do not forget to upload this javascript with the published html-questionnaire.

Note : how to insert the javascript in the Snap-questionnaire

Place the pointer in Title and select Font > Insert button > HTML-code, then choose the 3d option and insert this text

```
<script language="javascript" src="mailer-feedback.js"></script>
```

Back to the Statistics

This 4th choice shows a brief overview of all the actions, e.g.



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A	B	C	D	E	F
dataset	user	mail	read	click	submit
example	solus@skynet.be	TRUE	TRUE	TRUE	FALSE
example	leo.schreurs@snap-benelux.be	TRUE	TRUE	TRUE	TRUE
example	ip01@skynet.be	TRUE	TRUE	TRUE	TRUE
example	ip02@skynet.be	TRUE	FALSE	FALSE	FALSE
example	ip03@skynet.be	TRUE	FALSE	FALSE	FALSE

Save this in an excel file and select ONLY the addresses in column B (user) for which there is TRUE in column F (submit). Do this e.g. with the excel function Autofilter.

Then copy/paste the email addresses involved to excel file REMINDERS (which you have also received), into worksheet Feedback starting row 2. This worksheet thus holds the addresses of the people who answered the questionnaire.

In worksheet Send you have the original send list.

Be sure to check that you have maximum 10 fields in there because soon we will write some information into column K.

Here is an image of Send

	A	B
1	Email	Naam
2	solus@skynet.be	Solus
3	ip01@skynet.be	IP01
4	abc@d.e	Test
5	leo.schreurs@snap-benelux.be	Schreurs
6	ip02@skynet.be	IP02
7		

and Feedback

	A
1	Email
2	leo.schreurs@snap-benelux.be
3	ip01@skynet.be
4	
5	

Now run the only macro 'Lookup' that resides in REMINDERS.

In worksheet Non-response you will see something like this :

	A	B	C	D	E
1	Non-respondents				
2	solus@skynet.be				
3	abc@d.e				
4	ip02@skynet.be				
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

LOOK UP

Microsoft Excel ✖

Number of non-respondents = 3

OK



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i.e. you will find all emailaddresses to whom to possibly send a new invitation (reminder) to answer the questionnaire.

Also in worksheet Send a 0 is written in column K of the rows containing the email address of a non-respondent. From this worksheet it is easy to select the lines of the reminder addresses.

Do not forget to click OK in order to terminate the macro.

	A	B	C	D	E	F	G	H	I	J	K
1	Email	Naam									
2	solus@skynet.be	Solus									0
3	ip01@skynet.be	IP01									0
4	abc@d.e	Test									0
5	leo.schreurs@snap-benelux.be	Schreurs									0
6	ip02@skynet.be	IP02									0
7											

A couple of additional icons

These icons activate the following functions:



delete logs for dataset

Will clear all the statistics for the selected dataset and restart them from scratch.



edit user's profile

Allows you to define the email address of the **sender** (mostly your own address).

This needs to be a real address for the following reasons:

- the NON-delivered messages will reply their message to this address (e.g. absent, unexisting address...)
- intermediate providers can discard this message as being SPAM

the Display name is the 'alias'-name appearing as sender of the message emailbericht



change password

Function to change your password for solus-mailer

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