



# Training Manual

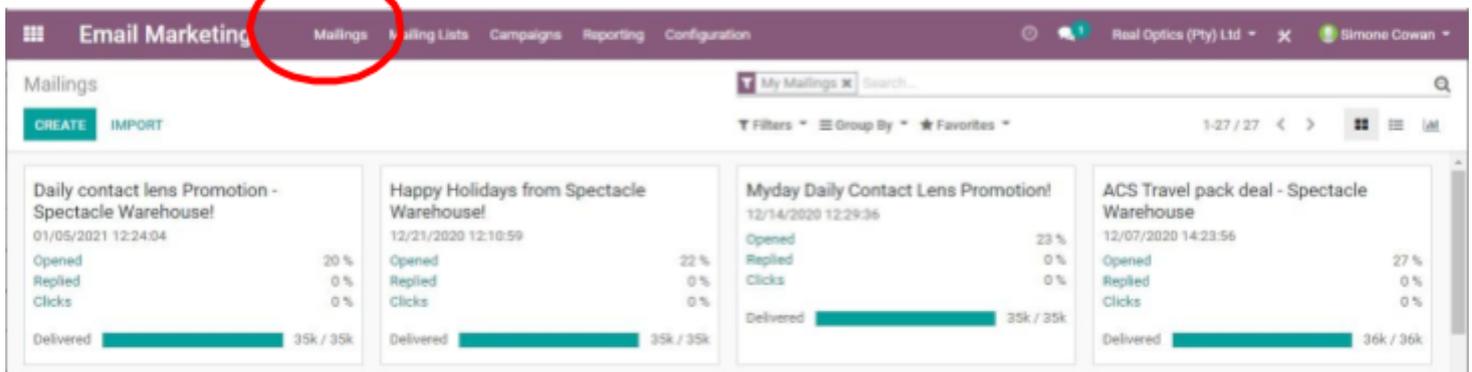
Humint O Lite  
Version 16

## Email Marketing



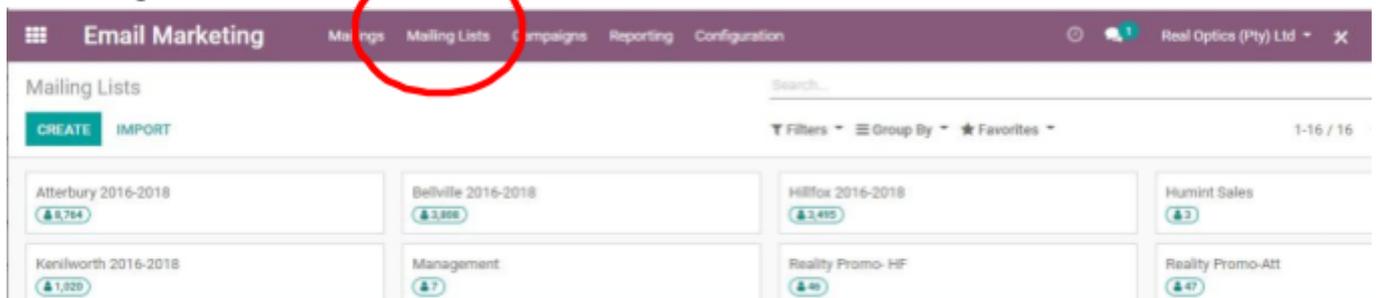
### Mailings

From here, you will be able to upload contacts databases and send bulk emails.



- When you open the Email marketing screen, it will feature the mailings that the User has created. To view all mails, click on the X next to the My Mailings in the search bar.
- You can click on the CREATE button to create a new bulk email
- The display name of the mail sent will be the heading. It will also be the Subject line of the email.
- The statistics of the email sent will also be shown on the home screen
  - Opened
  - Replied
  - Clicks
  - Delivered
- You can filter according to month/topic and so on.

### Mailing lists



Mailing lists can be created for specific bulk emails.

Certain type of patient – C/L wearer, cyclist, teacher, and so on.

It can be for certain year patients, certain age groups, depending on what you can export from your current contact list. All you need is to create a name to identify this group from the mailing list.

## Atterbury 2016-2018

8,764

What you will see is the name of the group and the number of recipients.

To create a new Mailing list, click on CREATE.

Create a Mass Mailing List ×

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Mailing List

**Mailing list name**

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Is Public

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**CREATE** DISCARD

You can insert the name of the group on this screen. Then click on CREATE

When you click on the list you have just created, this screen will open.

Mailing Lists / Recipients Valid Recipients × | Search...

**CREATE** IMPORT Filters ▾ Group By ▾ Favorites ★ ▾

**Create a new recipient**

You can then either create the recipients or you can import a list from excel by clicking on either CREATE or IMPORT.

### When you click on create:

Name

**John Smith**

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Tags

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Email  Created on

Title  Bounced 0 times

Company Name

Country

- All you need to enter is a name and the Email address. You can however add additional fields if you want to do so.

Mailing List      Unsubscription Date      Opt Out

Add a line

- You can add this recipient to various mailing list by clicking on Add a line and select the mailing lists you want to add the recipient to.

**When you click import:**

Mailing Lists / Recipients / Import a File

LOAD FILE    CANCEL

Select a CSV or Excel file to import.

Excel files are recommended as fields formatting is automatic.

Click on LOAD FILE, then select the excel or CSV file you want to upload.  
 This screen will pop up with the columns that you want to import.  
 Click on the X next to the fields that you don't want to import.

Map your columns to import

The first row contains the label of the column     Show fields of relation fields (advanced)

	Name	Blacklist	Bounced	Company Name	Created on	Email	Opt Out
	Name <input type="checkbox"/>	Don't import <input type="checkbox"/>	Email <input type="checkbox"/>	Don't import <input type="checkbox"/>			
__contact_157513_04a997f4	CHRISTELLE	False	0		2020-10-14 11:40:40	.christel.duplessis@mononto.com	False

Click on TEST IMPORT

You will get a response to tell you that all the fields seem valid, OR you will get a response telling you that there are invalid fields. You can correct those fields and TEST IMPORT again.

IMPORT    TEST IMPORT    LOAD NEW FILE    CANCEL

Map your columns to import

The first row contains the label of the column     Show fields of relation fields (advanced)

Everything seems valid.

Mailing Lists / Recipients / Import a File

IMPORT    TEST IMPORT    LOAD NEW FILE    CANCEL

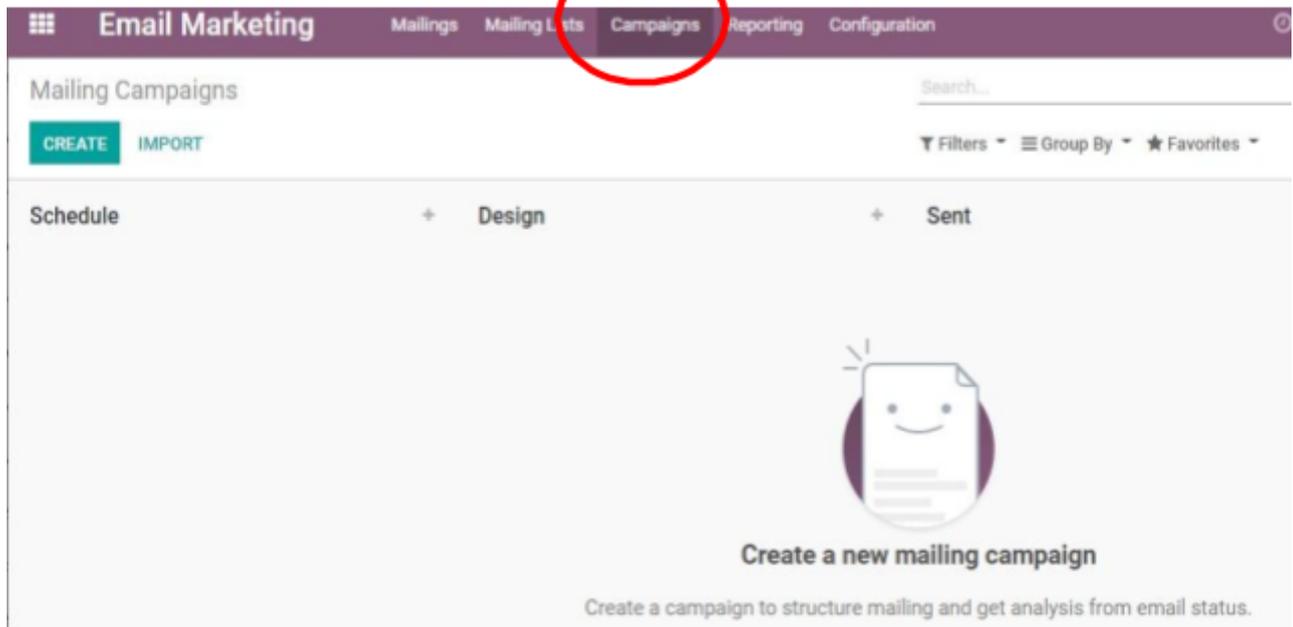
Map your columns to import

The first row contains the label of the column     Show fields of relation fields (advanced)

External ID	Name	Blacklist	Bounced	Company Name	Created on	Email
External ID <input type="checkbox"/>	Name <input type="checkbox"/>	Don't import <input type="checkbox"/>	Bounced <input type="checkbox"/>	Company Name <input type="checkbox"/>	Don't import <input type="checkbox"/>	Email <input type="checkbox"/>
__export__mail_mass_mailing_contact_157513_04a997f4	CHRISTELLE	False	0		2020-10-14 11:40:40	.christel.duplessis@mononto.cc
__export__mail_mass_mailing_contact_156257_4dc93fee	BAREND	False	0		2020-10-14 11:40:40	.duplessis.barry@gmail.com

Once you get the message – Everything seems VALID, Click on IMPORT.

## Campaigns



You can create specific email marketing campaigns and schedule the time they need to run.