

Using Your Documentation

The following documentation is included with Relatamail to help you effectively use the software.

User’s Manual

This manual offers information on how to use Relatamail. Please read this manual to understand how Relatamail works for registered users.

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Relatamail is the first component in a suite of open-source Customer Relationship Management (CRM) software tools, collectively known as Relata.

Relatamail is a complete industrial strength web-based email communications package with both user and administrative interfaces. Being web-based, the interface is a standard web browser.

The Relatamail source code is written in PHP (scripting language), HTML (hypertext markup language) and JavaScript (scripting language). JavaScript is used only for displaying pop-up windows and message boxes. The PHP is used for all Relatamail functionality and is embedded in the HTML. Why PHP? Stratabase.com believes in making their source code accessible to as broad an audience as possible. PHP has a rapidly growing developer base because of its ease of use and scalability. Relatamail is specifically built to function alongside some of the most widely used open-source applications such as MySQL, Apache, Linux, and Sendmail.

Relatamail allows distribution of mass customized email to thousands of recipients, supporting multiple lists, and offers automated web-based unsubscribe functionality and handling of undeliverable emails.

Relatamail includes a fully automated click-through tracking feature, and also provides AOL-friendly hyperlink formatting. The database integrated with Relatamail is MySQL, and the database structure provided is designed for enhanced scalability and data-capture.

Relatamail facilitates target marketing by allowing you to append marketing variables to destination URLs. This will allow for user-friendly communication using devices such as pre-filled forms that can ultimately strengthen relationships – all without the use of cookies.

Relatamail is free and released under the GNU General Public License.

We hope you enjoy Relatamail as much as we did creating it!

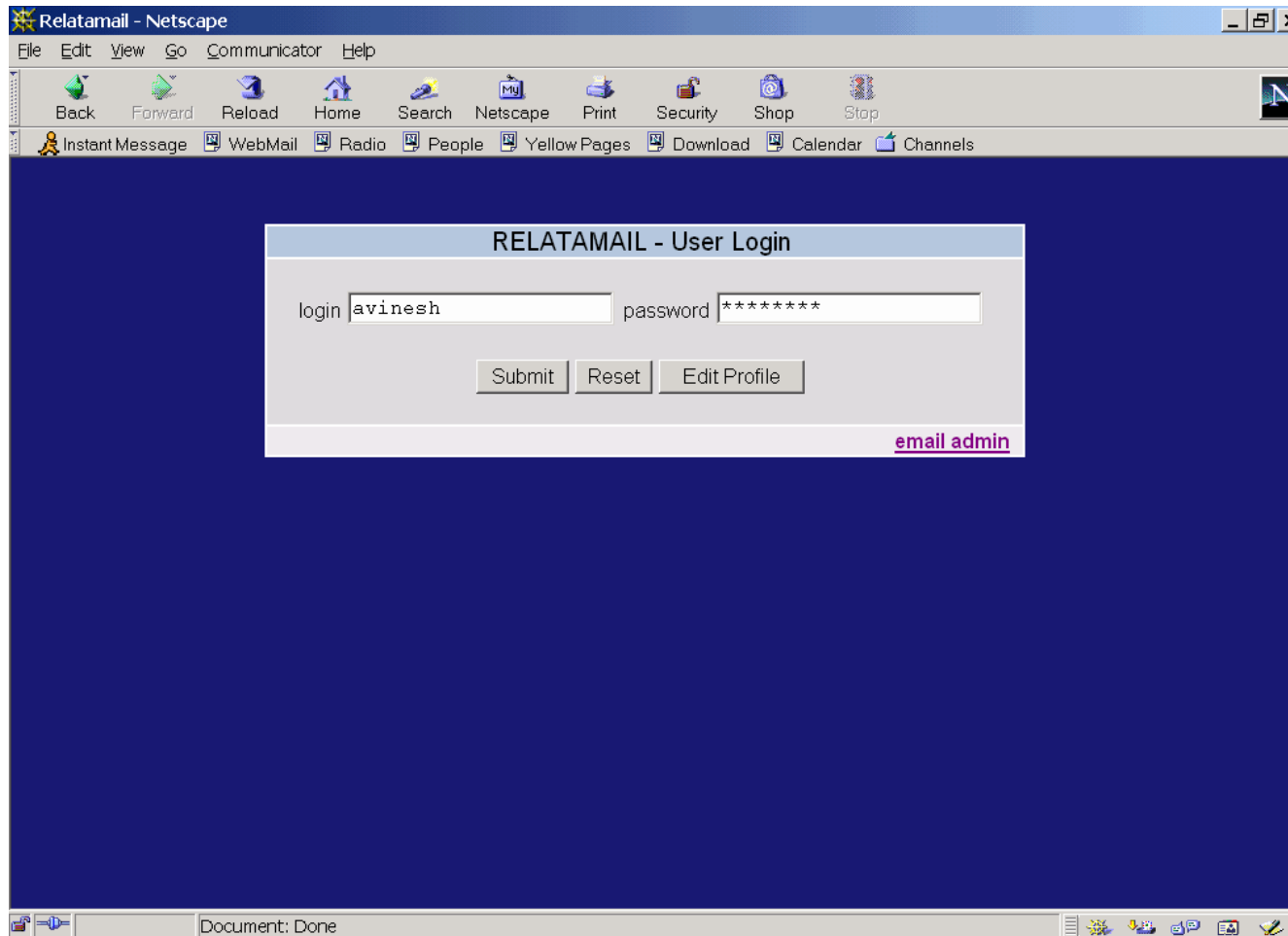
- Stratabase.com

Chapter 2

Using Relatamail

This chapter of the manual explains how to use Relatamail and assumes that Relatamail has been successfully installed and configured. It is important that all registered users read this chapter to familiarize themselves with all that Relatamail has to offer.

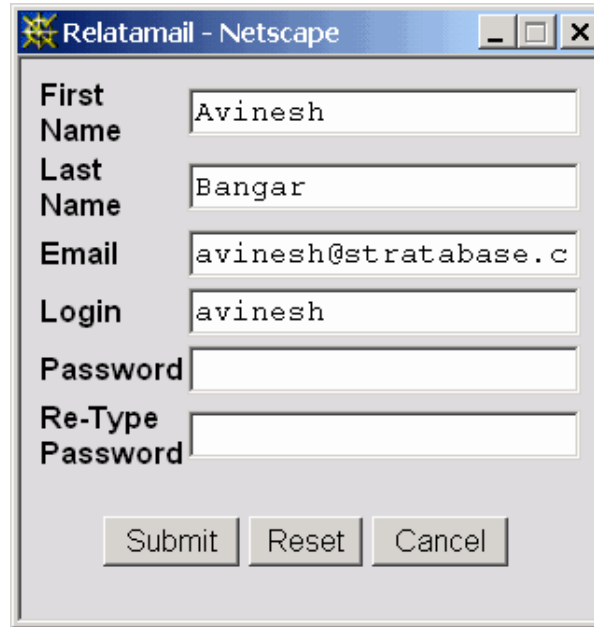
2.1 Logging In



Upon accessing Relatamail, you will be presented with the above login screen.

Type in your login name and password and click 'Submit' to login. If you cannot log in, you have specified an incorrect login or password. If the problem persists, contact the Relatamail administrator who can reset your account. Should you wish to edit your profile, click 'Edit Profile.'

2.2 Editing Your Profile



A screenshot of a Netscape browser window titled "Relatamail - Netscape". The window contains a form for editing a profile. The form has the following fields and labels:

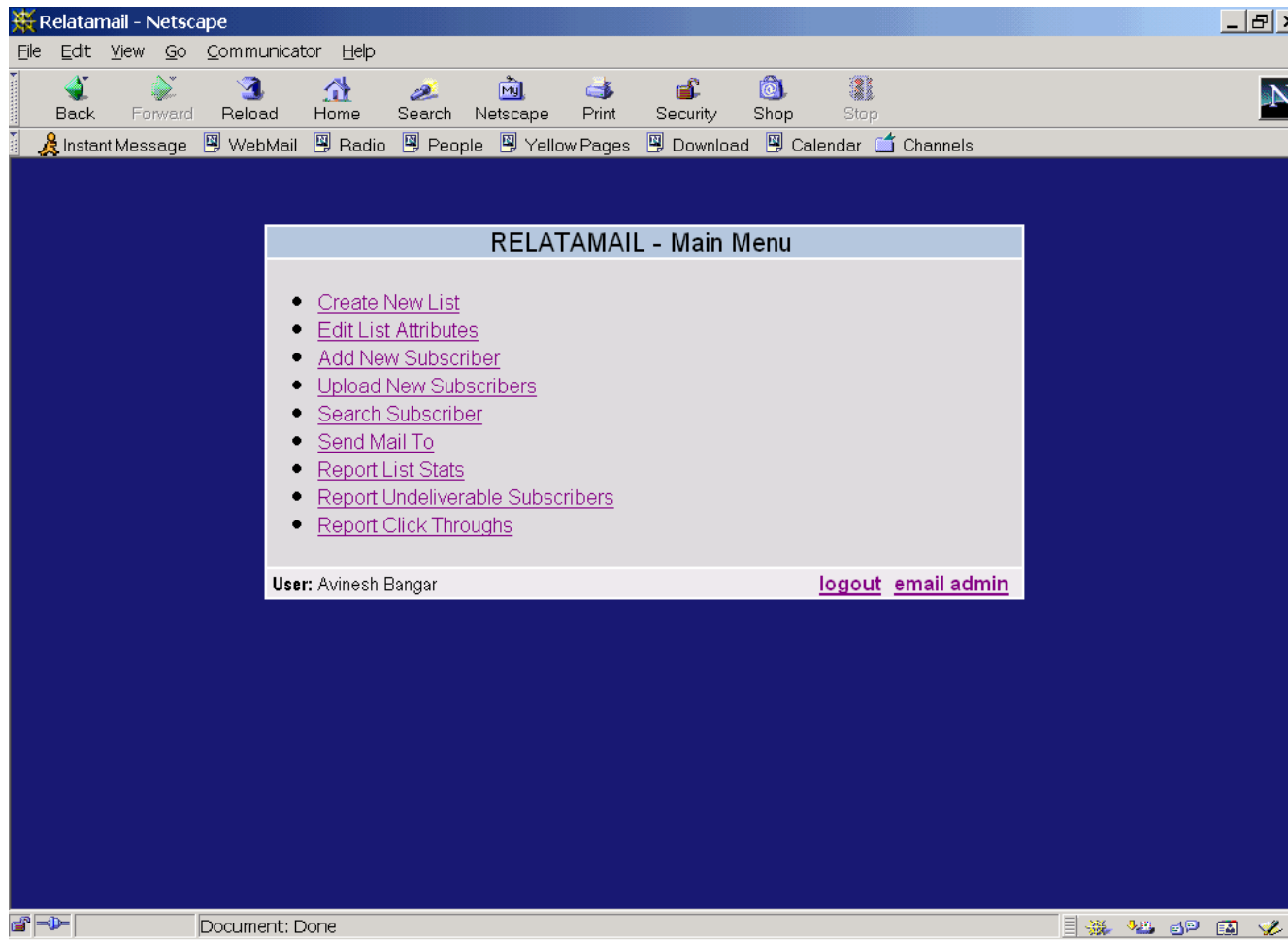
- First Name**: Text input field containing "Avinesh".
- Last Name**: Text input field containing "Bangar".
- Email**: Text input field containing "avinesh@stratabase.c".
- Login**: Text input field containing "avinesh".
- Password**: Text input field (empty).
- Re-Type Password**: Text input field (empty).

At the bottom of the form are three buttons: "Submit", "Reset", and "Cancel".

Should you want to edit your profile, you will be presented with the pop-up window above.

You can modify your first name, last name, email address, login name, and password from this window. Once you are done making changes click 'Submit' to save them.

Having successfully logged in, you will be presented with the following web page:



The above is the Main Relatamail Menu.

Note: If you are a newly registered Relatamail user, you will only see the 'Create New List' menu option. You must create at least one list before you can access the other menu options.

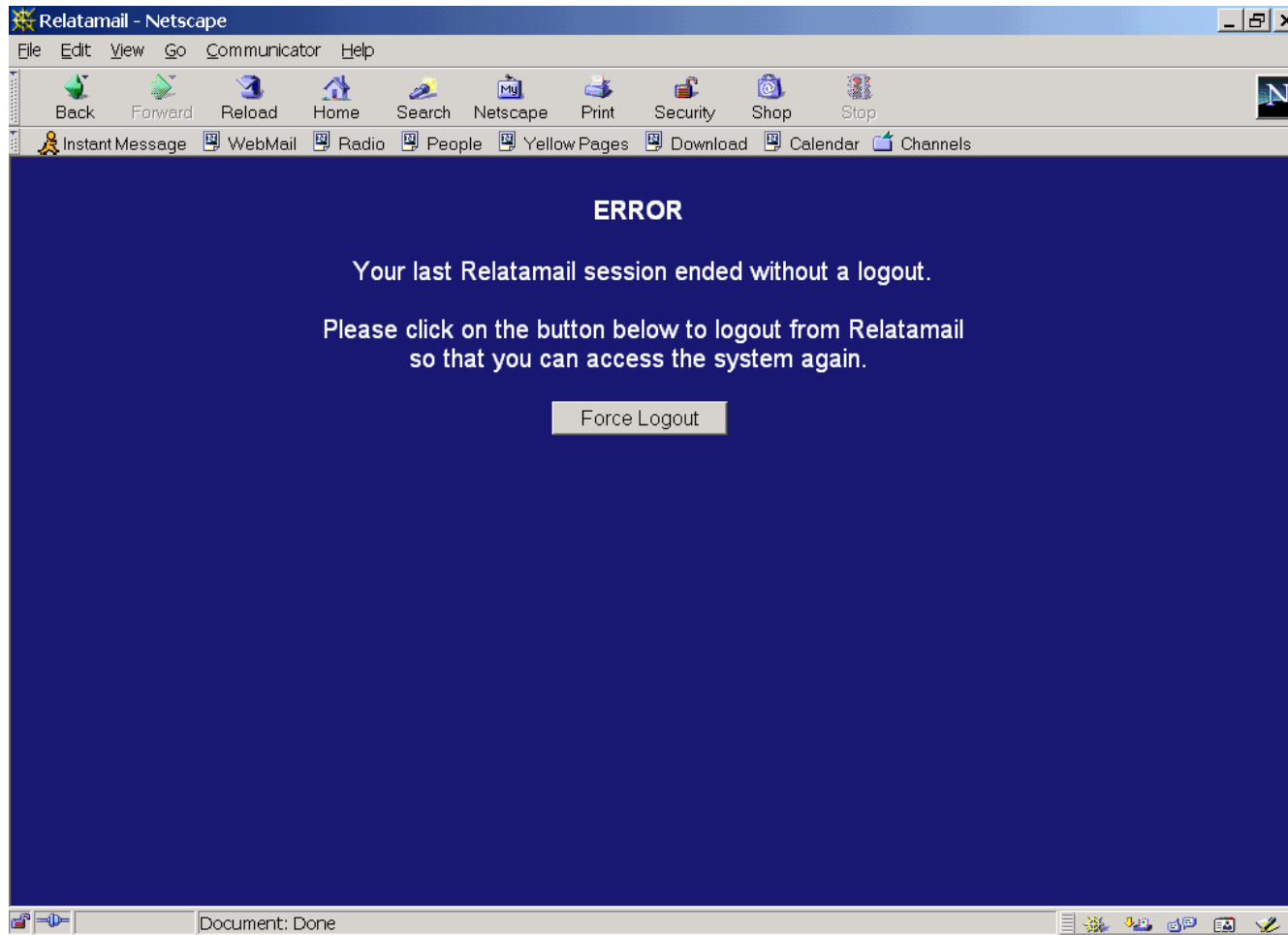
Pick one of the menu options by simply clicking on a link:

- Create New List
- Edit List Attributes
- Add New Subscriber
- Upload Subscriber List
- Search Subscriber
- Send Mail To
- Report Click Throughs
- Report List Stats
- Report Undeliverable Subscribers

Each of these will be discussed in detail in the following sections of the manual.

2.3 Logging Out

Should you need to log out, simply click on the 'logout' link at the bottom of any web page. Should you need help, click on the 'email admin' link to contact the administrator.



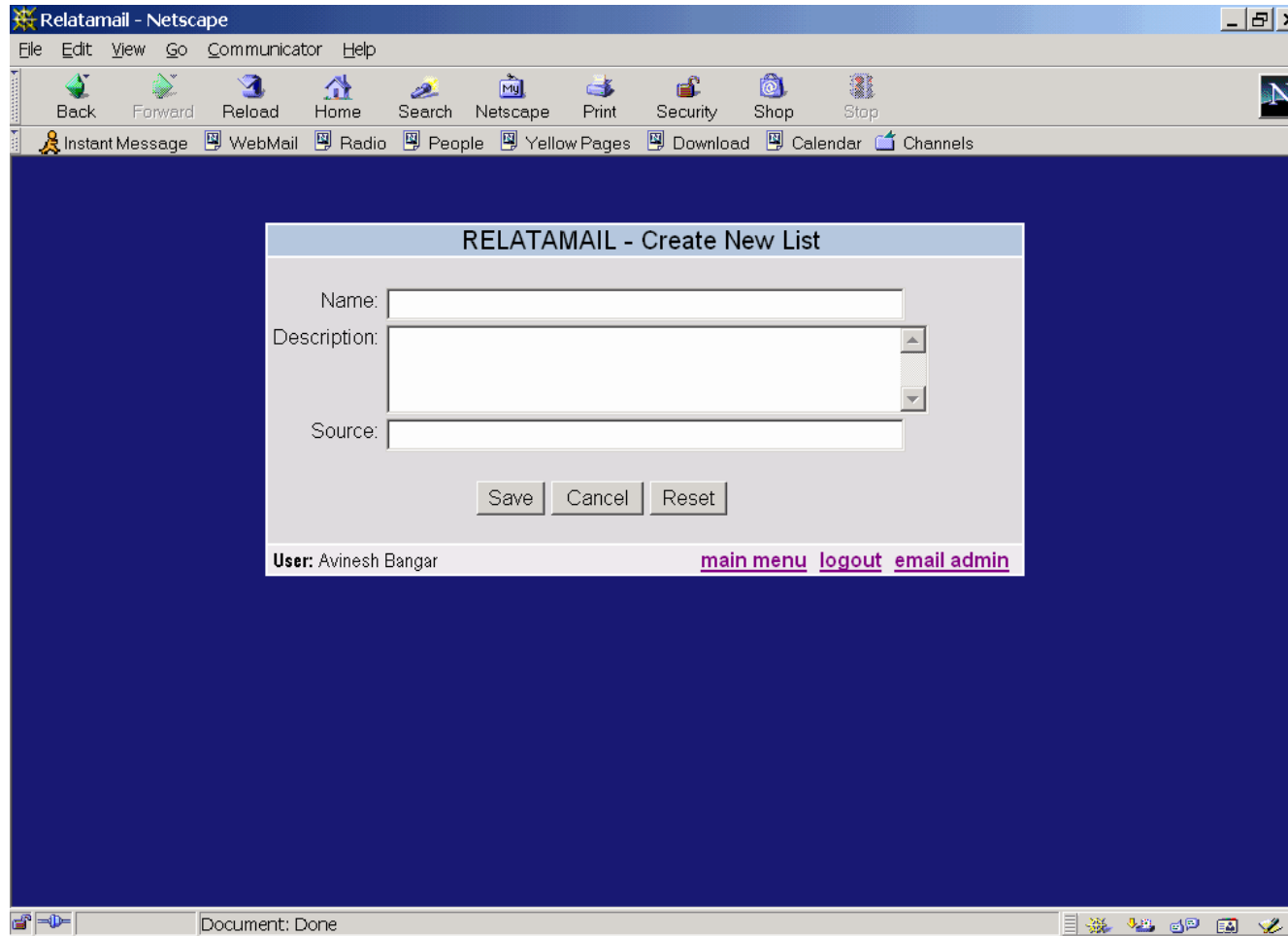
Relatamail allows you to have only one open session. In the event that you login twice, without logging out after your first login, you will be presented with the above web page:

Simply click the 'Force Logout' button to logout and then login again.

2.4 Creating Lists

To create a new list, simply click on 'Create New List' from the main menu.

You will be presented with the following web page upon clicking 'Create New List':



The screenshot shows a Netscape browser window titled "Relatamail - Netscape". The address bar is empty. The menu bar includes File, Edit, View, Go, Communicator, and Help. The toolbar contains icons for Back, Forward, Reload, Home, Search, Netscape, Print, Security, Shop, and Stop. The status bar at the bottom shows "Document: Done".

The main content area has a dark blue background. In the center is a white form titled "RELATAMAIL - Create New List". The form contains three input fields: "Name:", "Description:", and "Source:". Below these fields are three buttons: "Save", "Cancel", and "Reset". At the bottom of the form, it says "User: Avinesh Bangar" followed by three links: "main menu", "logout", and "email admin".

A description of the fields on the form:

Form Field	Description
Name	The name of the new list
Description	A brief description of what the list is for
Source	The original creator/provider of the list

Once you are done filling out the form, click 'Save.' 'Reset' will clear the form and 'Cancel' will take you back to the Main Menu. Alternatively, click the 'main menu' link at the bottom of the web page to return to the Main Menu.

Here is a sample filled out form:

The screenshot shows a Netscape browser window titled "Relatamail - Netscape". The address bar is empty. The menu bar includes File, Edit, View, Go, Communicator, and Help. The toolbar contains icons for Back, Forward, Reload, Home, Search, Netscape, Print, Security, Shop, and Stop. The status bar at the bottom shows "Document: Done".

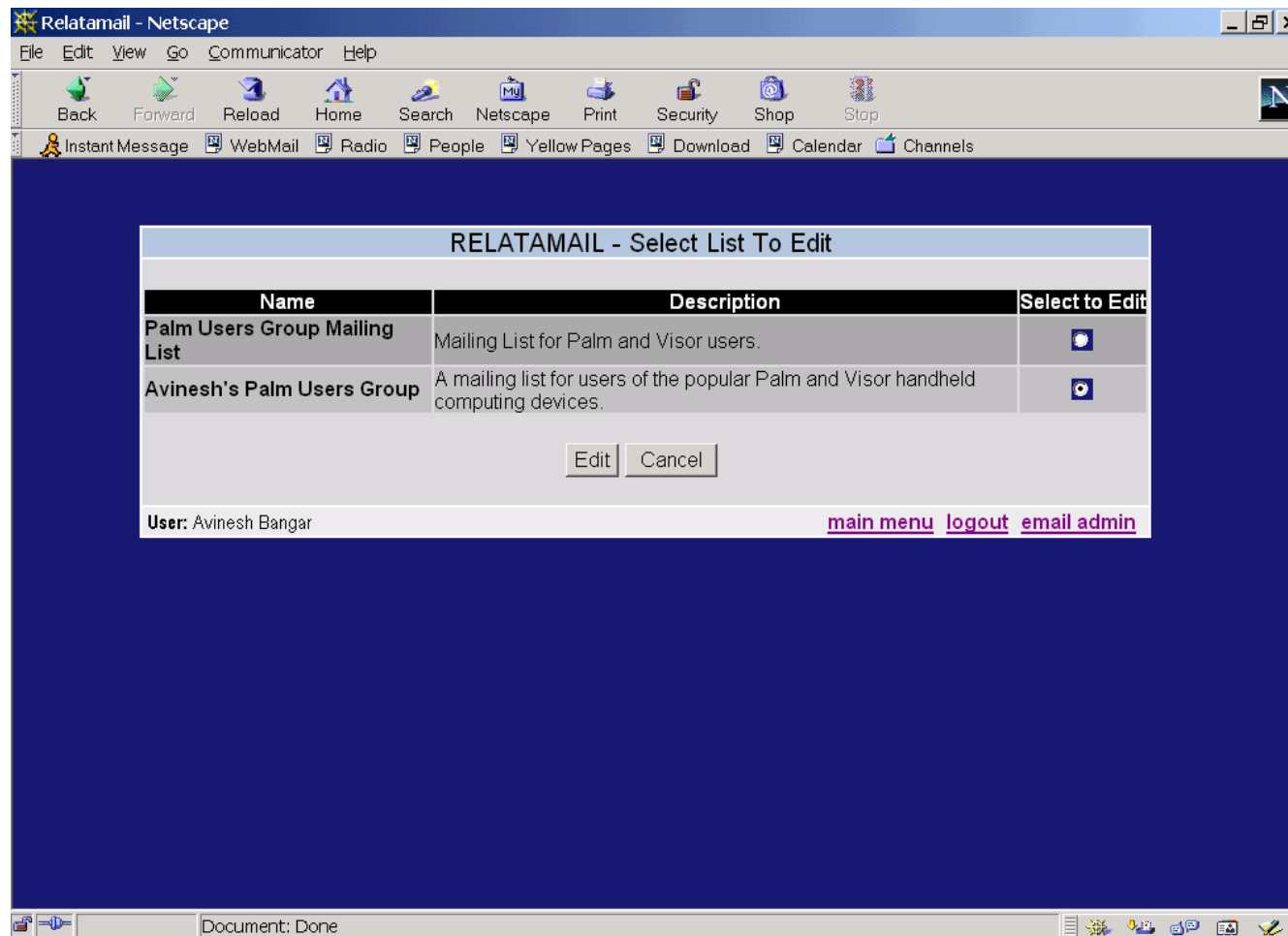
The main content area displays a form titled "RELATAMAIL - Create New List". The form has the following fields and buttons:

- Name:** A text input field containing "Avinesh's Palm Users Group".
- Description:** A text area containing "A mailing list for users of the popular Palm and Visor handheld computing devices." with up and down arrow buttons on the right.
- Source:** A text input field containing "stratabase.com".
- Buttons:** Three buttons labeled "Save", "Cancel", and "Reset" are located below the form fields.

At the bottom of the form, the text "User: Avinesh Bangar" is displayed on the left, and three links are on the right: [main menu](#), [logout](#), and [email admin](#).

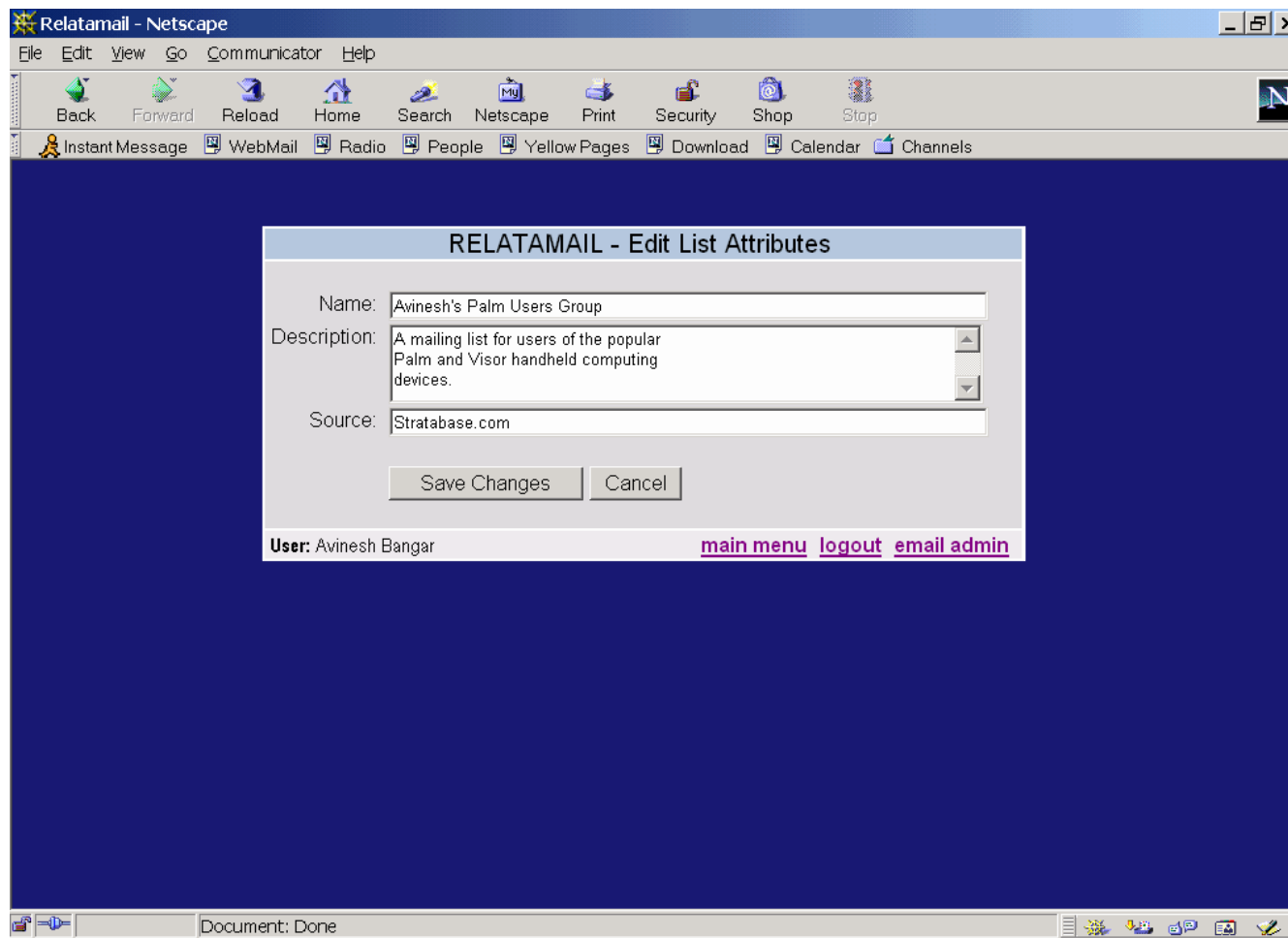
2.5 Editing List Attributes

Clicking on 'Edit List Attributes' on the Main Menu will bring you to the following web page:



Select the list that you would wish to edit the attributes for by clicking in the small circle to the right of the list you'd like to edit. Now click 'Edit' to edit the list attributes. You may edit the name, description, and source of the list.

You will be given an opportunity to edit the list attributes and then save the changes as shown in the following web page screenshot:



Once 'Save Changes' is clicked, it will return you to an updated listing of your lists under the 'Edit List Attributes' page. Click the 'main menu' link to return to the main menu once you are done editing lists.

2.6 Adding Subscribers

Upon clicking the 'Add New Subscriber' link from the Main Menu, you will be allowed to manually add new contacts and subscribe them to your existing lists. Just fill out the form shown below.

The following screenshot shows the top portion of the form:

The screenshot shows a Netscape browser window titled "Relatamail - Netscape". The address bar shows "RELATAMAIL - Add New Subscriber". The form contains the following fields and options:

Email:	avinesh@stratabase.com
First Name:	Avinesh
Last Name:	Bangar
Address:	203 - 34314 Marshall Road
City:	Abbotsford
State:	BC
Zip:	12345
Country:	Canada
Phone 1:	(604) 123-4567
Phone 2:	(604) 123-4569
Fax:	(604) 123-4577
Language:	English
Birthdate:	01/01/78
Sex:	<input checked="" type="radio"/> male <input type="radio"/> female
Married:	<input type="radio"/> yes <input checked="" type="radio"/> no
Employed:	<input type="radio"/> yes <input checked="" type="radio"/> no
Email Type:	<input checked="" type="radio"/> text <input type="radio"/> html <input type="radio"/> rich

List	Description	Check to Subscribe
Baby House Group		

Document: Done

The following web page screenshot displays the bottom portion of the form:

Relatamail - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Stop

Instant Message WebMail Radio People Yellow Pages Download Calendar Channels

State: BC

Zip: 12345

Country: Canada

Phone 1: (604) 123-4567

Phone 2: (604) 123-4569

Fax: (604) 123-4577

Language: English

Birthdate: 01/01/78

Sex: ☒ male ☐ female

Married: ☐ yes ☒ no

Employed: ☐ yes ☒ no

Email Type: ☒ text ☐ html ☐ rich

List	Description	Check to Subscribe
Palm Users Group Mailing List	Mailing List for Palm and Visor users.	<input type="checkbox"/>
Avinesh's Palm Users Group	A mailing list for users of the popular Palm and Visor handheld computing devices.	<input checked="" type="checkbox"/>

Add Reset Cancel

User: Avinesh Bangar [main menu](#) [logout](#) [email admin](#)

Document: Done

Ensure that the subscriber is subscribed to at least one list under: 'Check to Subscribe' and then click on 'Add' to add the subscriber to the selected list(s).

Click on the 'main menu' link, to return to the Main Menu.

2.7 Uploading Subscriber Lists

Upon clicking 'Upload Subscriber List' from the Main Menu, you will be given an opportunity to upload a text file of contacts or you may manually type in contacts you would like to add from a text file (copy/pasted to text area on form).

The following screenshot displays the 'Upload Subscriber List' web page:

The screenshot shows a Netscape browser window titled "Relatamail - Netscape". The address bar shows "Document: Done". The main content area has a dark blue background. A white form titled "RELATAMAIL - Upload New Subscribers" is centered. The form has two sections: "Text File:" and "Contact Information (data fields must be comma delimited)". The "Text File:" section has a text input field containing "H:\PalmContact\New T", a "Browse..." button, a "Process File" button, and a "Clear" button. The "Contact Information" section has a large text area containing the text "Linus Torvalds, 31337 Linux Ave., LinuxCity, LinuxState, 1:". Below the text area are three buttons: "Process Contact Info", "Clear", and "Cancel". At the bottom of the form, it says "User: Avinesh Bangar" and has three links: "main menu", "logout", and "email admin".

RELATAMAIL - Upload New Subscribers

Text File:
H:\PalmContact\New T

Contact Information (data fields must be comma delimited)
Linus Torvalds, 31337 Linux Ave., LinuxCity, LinuxState, 1:

User: Avinesh Bangar [main menu](#) [logout](#) [email admin](#)

Use the 'Browse' button to select a text file of new contacts and then click 'Process File' to add the contacts to the database. Alternatively, copy and paste the data into the 'Contact Information' text area and click 'Process Contact Info' to add the new contact to the database. The data fields must be comma delimited.

The following web page is generated after you click 'Process File' or 'Process Contact Info':

The screenshot shows a Netscape browser window titled "Relatamail - Netscape". The address bar shows "Document: Done". The main content area has a dark blue background with a central white box titled "RELATAMAIL - Upload New Subscribers".

Inside the white box, there are two sections:

- Map Column Headings:** A table with 5 columns and 2 rows. The first row has headers "Column" and "Heading". The second row has values "1", "Email", "2", "First_Name", "3", "Last_Name", "4", "Address", and "5", "City". Each heading is in a dropdown menu.
- Select List(s):** A table with 3 columns: "List" and "Select". It contains two rows: "Palm Users Group Mailing List" with an unchecked checkbox, and "Avinesh's Palm Users Group" with a checked checkbox.

Below these sections are four buttons: "Preview", "Upload", "Reset", and "Cancel".

At the bottom of the white box, there is a line of text: "Please **Preview** before you **Upload** to ensure that the data has been correctly organized under the appropriate column headings."

At the very bottom of the white box, there is a line of text: "User: Avinesh Bangar" followed by three hyperlinks: "main menu", "logout", and "email admin".

Based on the number and the type of data fields entered in the previous form (or uploaded via text file), you can choose from the list of column headings, a column name to correspond to each data field. You must also select one or more lists to subscribe the new contacts to.

Note: Please ensure that an email column heading/data field is included.

You may preview the table format of the uploaded data by clicking 'Preview'.

Once you're satisfied with the preview you can click 'Upload' to begin uploading.

Be sure to click the 'email admin' hyperlink if you run into any problems uploading your data.

2.8 Searching for Subscribers

The 'Search Subscriber' option on the Main Menu allows you to search for a particular subscriber using any combination of their email address, first name, and last name.

The following is a screenshot with fields on the form filled out:

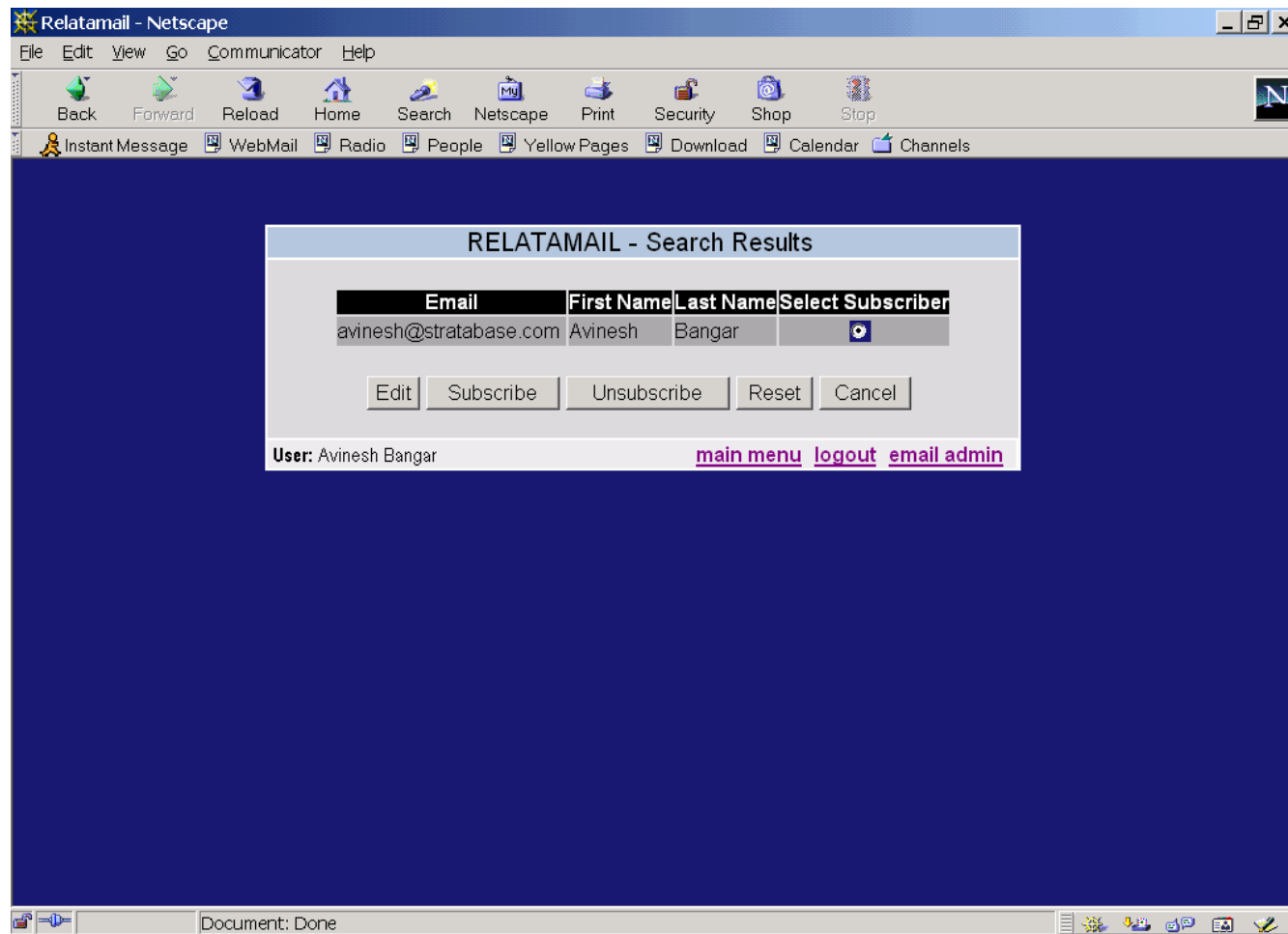
The screenshot shows a Netscape browser window titled "Relatamail - Netscape". The address bar is empty. The browser's menu bar includes "File", "Edit", "View", "Go", "Communicator", and "Help". The toolbar contains icons for "Back", "Forward", "Reload", "Home", "Search", "Netscape", "Print", "Security", "Shop", and "Stop". The status bar at the bottom shows "Document: Done".

The main content area displays a form titled "RELATAMAIL - Search Subscriber". The form has three input fields: "Email:" with the value "avinesh@stratabase.c", "First Name:" with the value "Avinesh", and "Last Name:" which is empty. Each field is followed by "AND" and "OR" radio buttons. The "Email:" field has the "AND" radio button selected. Below the input fields are three buttons: "Search", "Reset", and "Cancel".

At the bottom of the form, it says "User: Avinesh Bangar" followed by three links: [main menu](#), [logout](#), and [email admin](#).

Click 'Search' to begin searching for a particular subscriber. The email address is a unique identifier and should be used most often.

Below is the 'Search Results' screenshot:

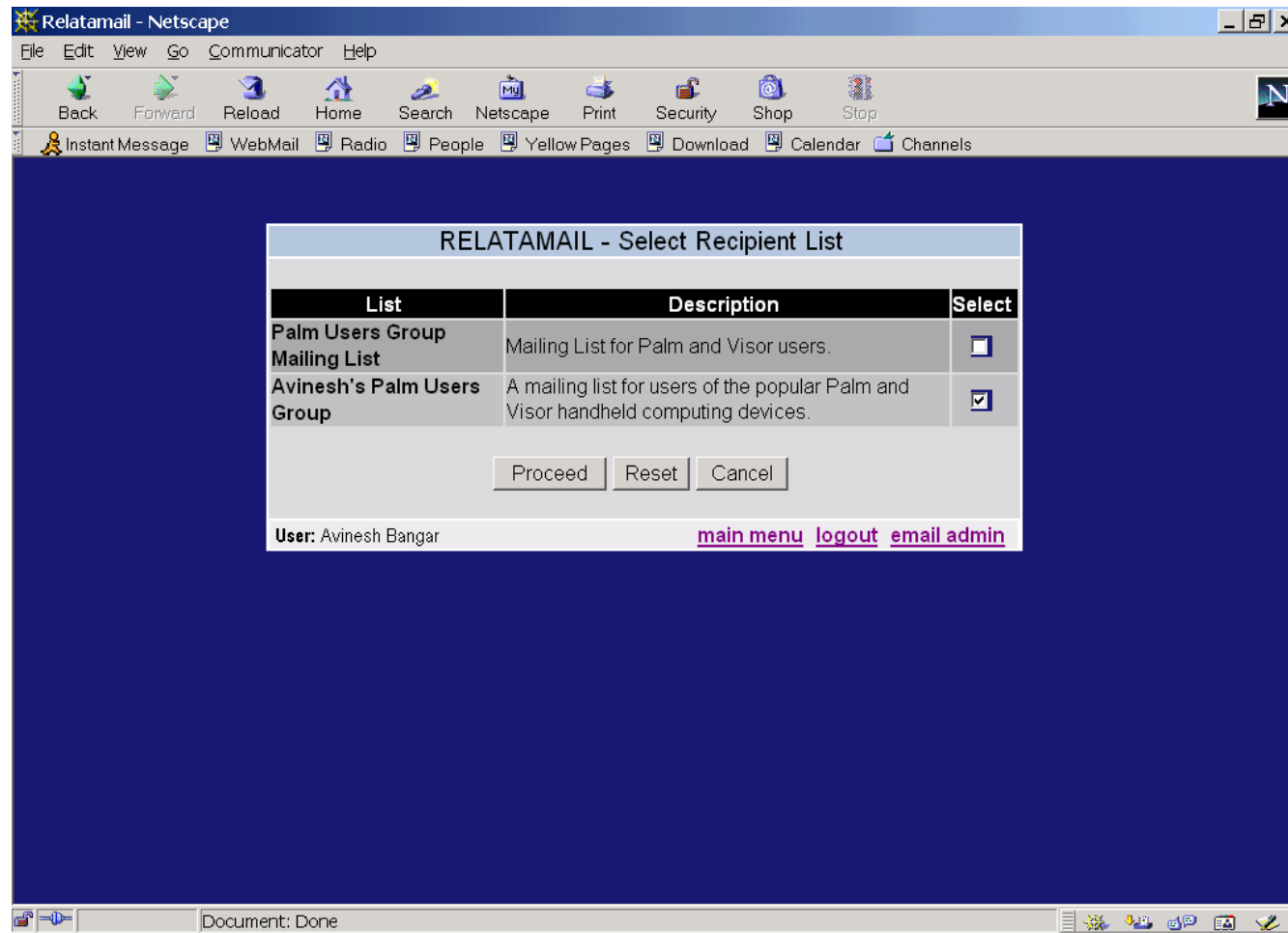


Select a subscriber that you would like to edit by clicking in the small circle to the right of the shown subscriber. Then click 'Edit' to edit the subscriber's particulars or alternatively, click 'Subscribe' or 'Unsubscribe' to subscribe or unsubscribe the selected subscriber to/from lists.

Click on the 'main menu' link to return to the Main Menu.

2.9 Send Mail To

The 'Send Mail To' menu option is used to send out an email message to multiple list recipients (also referred to as an email campaign, a bulk email send out or a blast).



Select the list you would like to send your email message to by selecting the list and then clicking 'Proceed.'

Upon clicking 'Proceed' you will be presented with the following web page:

The screenshot shows a Netscape browser window titled "Relatamail - Netscape". The address bar shows "Document: Done". The main content area displays the "RELATAMAIL - Create Email Message" form. The form fields are as follows:

- *Message Title/Description:** A text area containing "First email sendout to Palm mailing list."
- From:** A text field containing "avinesh@stratabase.com" and a "user friendly name" field containing "Avinesh Bangar".
- *Subject:** A text field containing "Welcome to the Palm Users Mailing List".
- Destination Site:** A text field containing "http://www.stratabase.com/~Palm/newsletter1.php".
- Unsubscribe Text:** A text field containing "Click here to unsubscribe".
- AOL Recipient Aware:** A checkbox that is checked.
- Additional Variable:** A dropdown menu set to "Email" with the text "(appended to the destination url)".
- *Message:** A text area containing "Welcome to the Palm Users Mailing List" followed by several lines of equals signs.

This is the form in which you will create your email message. Shown above is the top portion of the form.

Please read the following.

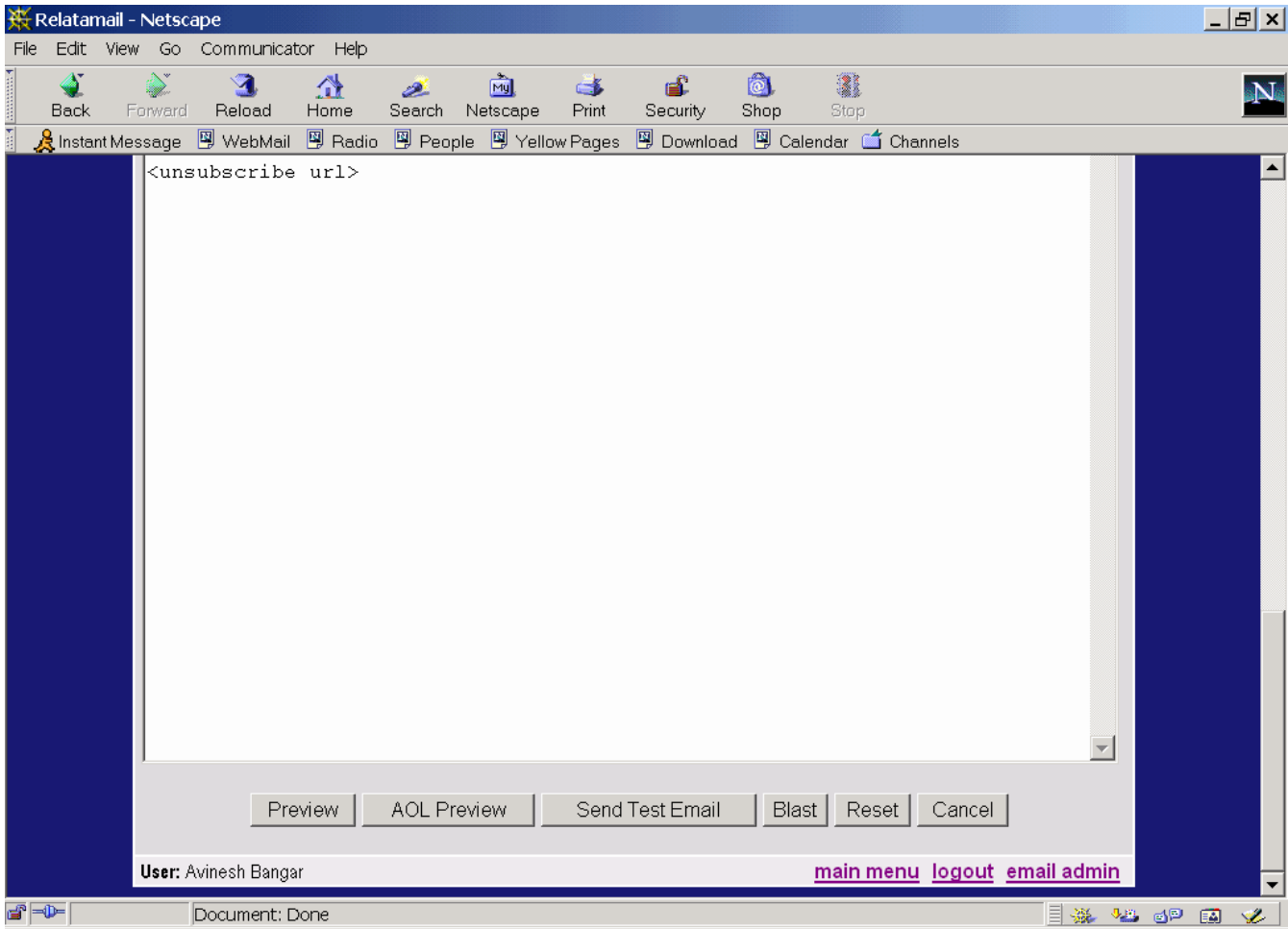
AOL Recipient Aware: Click this if any of the lists that you are sending to contain AOL recipients. Any embedded URLs for AOL email recipients must be specially formatted.

Additional Variable: Use this to append an additional marketing variable to the end of the destination URL. You can use this feature to pre-fill a form for the recipient. You can only select one of the marketing variables from the list provided.

<destination site> Use this tag in your email message instead of manually typing in the destination URL. It will be eventually replaced by an intermediate URL in the actual email message. The intermediate URL will intercept the recipient's click, record the event in the database and then redirect the recipient to the actual destination site.

<unsubscribe url> Use this tag in your email message instead of manually typing in the unsubscribe prompt and the unsubscribe URL. It will be eventually replaced by the 'unsubscribe prompt' and an intermediate URL in the actual email message. The intermediate URL will intercept the recipient's click and then redirect the recipient to the actual unsubscribe site.

Below is a screenshot of the bottom portion of the above form:



There are six options at the bottom of the form, namely: Preview, AOLPreview, Send Test Email, Blast, Reset, and Cancel.

Button	Description
Preview	preview how the message will look before you send it
AOL Preview	preview how the message will look before you send it to AOL recipients
Send Test Email	send a sample email to a specified email recipient
Blast	send the message to the selected recipient lists
Reset	reset all form values

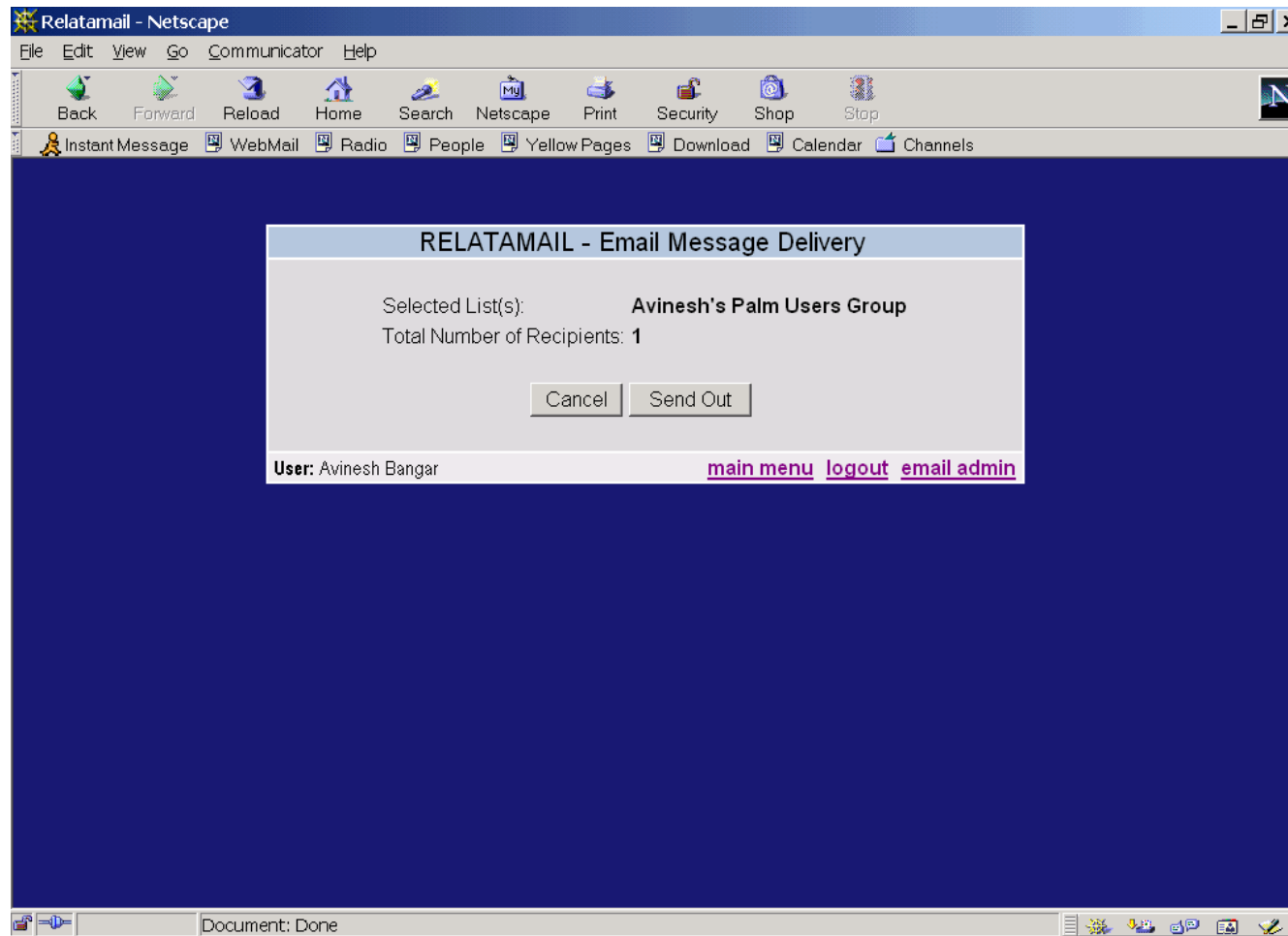
Cancel

return to the 'Select List Recipient List' form

We will look at the 'Blast' option in detail.

2.9.1 Blast

Upon clicking 'Blast' you will be presented with the following web page:



Click 'Send Out' to begin the Email Campaign (blast) or click 'Cancel' to return to the previous page.

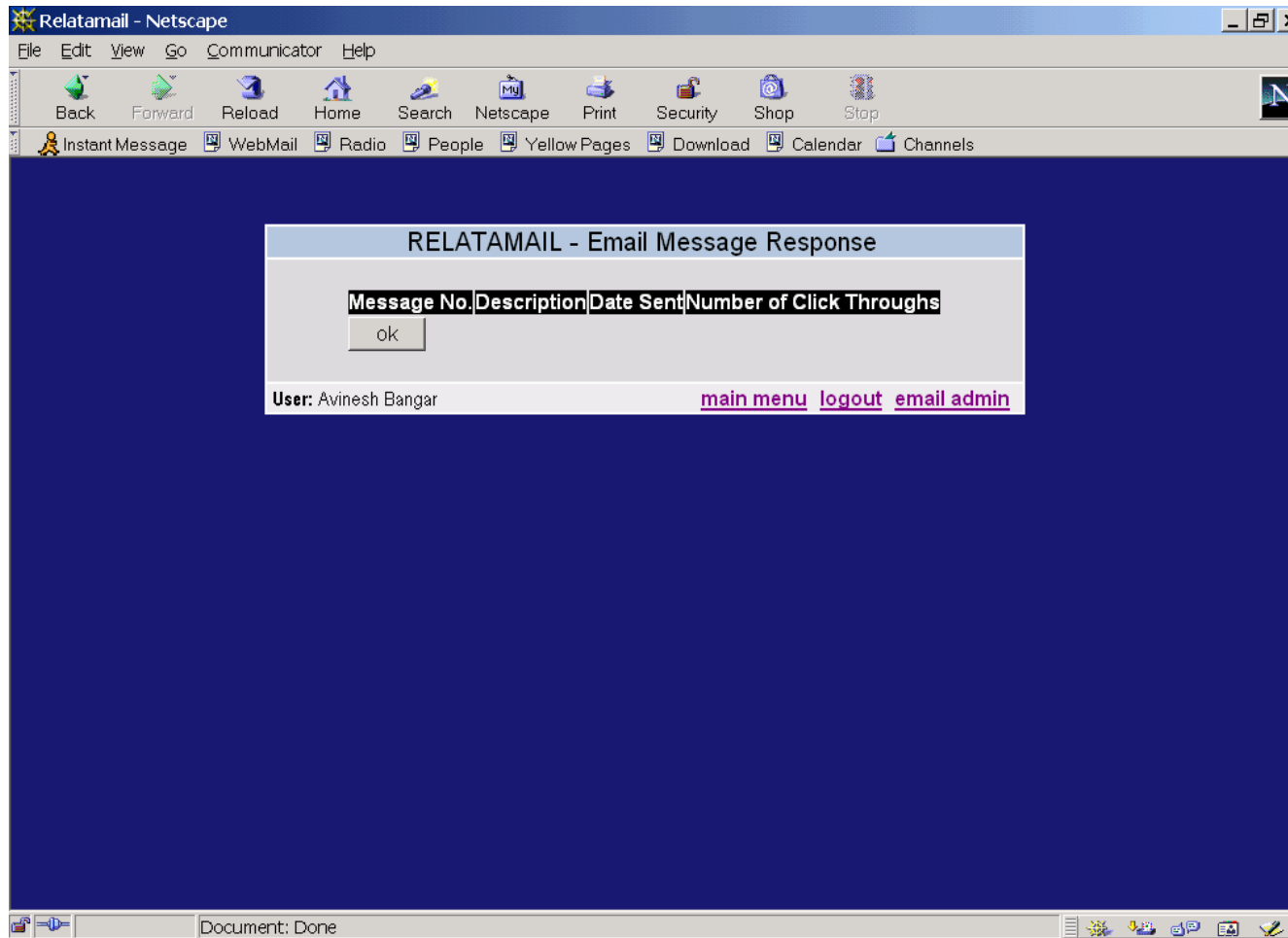
When 'Send Out' is clicked, all data is written to a database and a blast queue is updated. Your Relatamail administrator will authorize and execute the blast.

Although the administrator will know that you have a blast ready to be sent out, you can click the 'email admin' link to email the administrator and notify him/her that your blast is ready to be sent out. The Relatamail administrator will also be able to email you to let you know when your blast was started and when it finished.

The speed at which emails will be sent will depend on the server hardware and also on the mail server. Relatamail has been developed using Sendmail 8.8.x and can currently send out approximately 3000 emails per hour. Future updates of Relatamail, will of course, strive to send out emails much faster.

2.10 Viewing the Number of Click Throughs

The 'Report Click-Throughs' menu option will allow you to view the number of subscribers that have clicked on the intermediate URL hyperlink, embedded in your email message, to view the actual destination site.

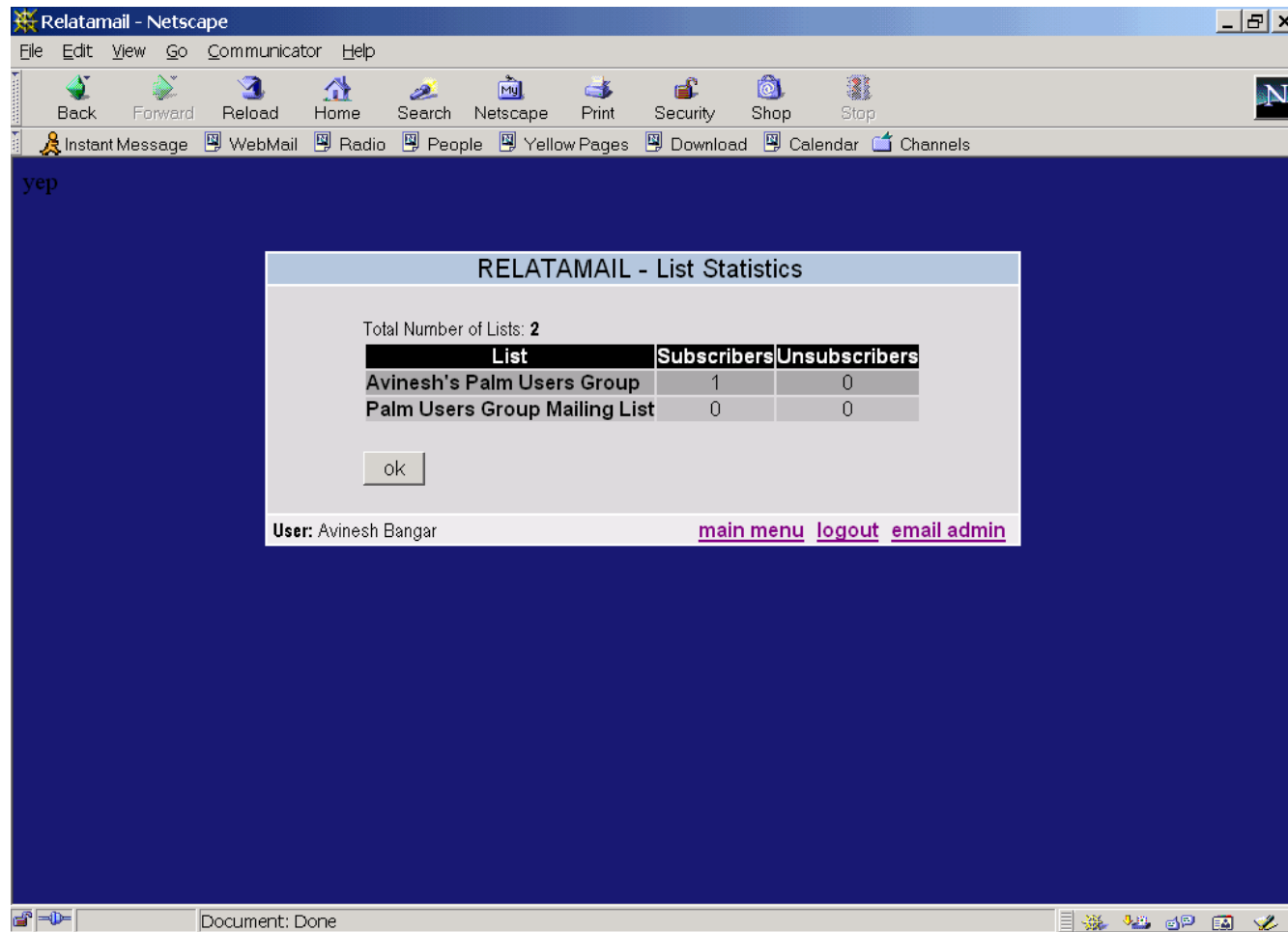


The above email message was sent to one user, as per the previous screenshot shows. The email has been sent to the recipient, however the recipient has not clicked on the embedded URL hyperlink in the message.

Click on the 'main menu' link to return to the Main Menu or click the 'logout' link to logout.

2.11 List Statistics

The 'Report List Statistics' menu option allows you to view the number of subscribers and unsubscribers for each one of your lists.



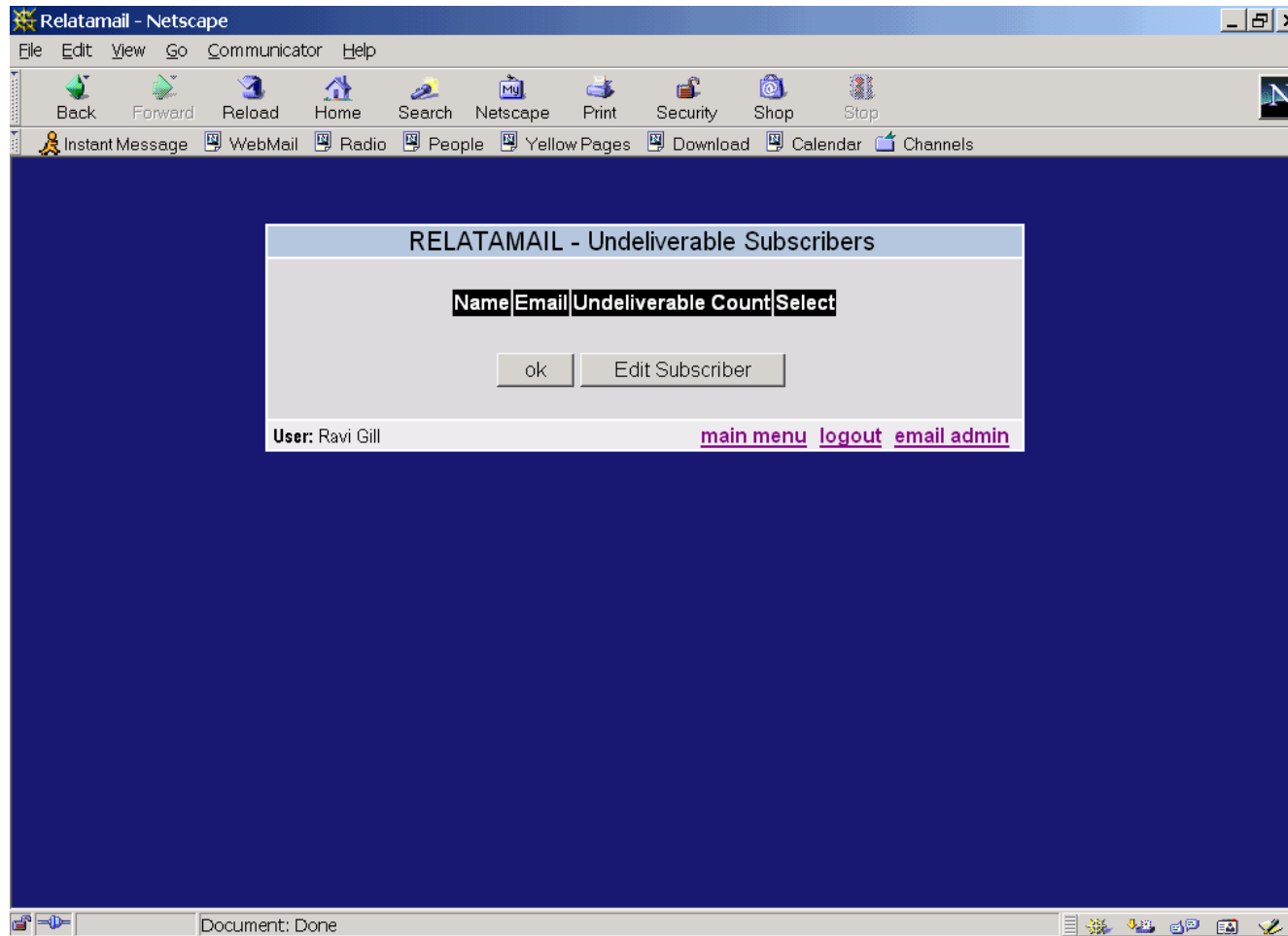
The above screenshot shows that the first list has only one subscriber.

Click the 'main menu' link to return to the 'Main Menu' and click the 'logout' link to logout.

2.12 Undeliverable Subscribers

The 'Report Undeliverable Subscribers' menu option on the Main Menu allows you to see the name and the email of a subscriber that could not be reached by email server. Typical reasons that the subscriber could not be contacted include: the subscriber registered with a different ISP, the ISP's email server was dysfunctional at the time of the blast, or there was a spelling error in the email address. The undeliverable count shows the number of times the particular subscriber was marked as 'undeliverable'.

You may edit the subscriber's email address in an effort to correct any spelling mistakes. If any email address editing is done, the 'Undeliverable Count' will be reset to zero.



Click the 'main menu' link to return to the 'Main Menu'.

The Relatamail user tour ends here. Don't forget to logout once you're done using Relatamail.

Thank you

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APPENDIX

Glossary

Term	Definition
AOL	America Online. A national internet service provider (ISP) who offers their customers a special interface that must be used in order to use their services which include email
Blast	See email campaign
Click-Through	Term used to describe the event in which a user clicks on an email message URL embedded in the email as a hyperlink
Database	A logical entity that stores vast amounts of data on a physical device such as a hard drive
Email campaign	Term used to describe the mechanism used to send email messages to all subscribers of a list
ISP	An acronym for Internet Service Provider. Provides Internet service to residents of a municipality at a fixed or variable monthly cost
Open-source	Term used to refer to projects released under the General Public License (GPL) that come with source code. They are freely available and may be modifiable in respect to the terms laid out in the GPL.
Redirect	Term used to refer to the process involving an automatic transfer to another web page.
Sendmail	An open-source email server that is used by Relatamail. You may download it from http://www.sendmail.org
Server	A logical entity running on a computer that serves or stores data and/or application software for users
Variable	A logical entity that stores data, usually temporarily