

User Guide

for

Bulk Mail Management System

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1. Access to the System

Access the bulk mail Management System via the following URL with your internet browser¹:

<https://bulkmail.ln.edu.hk>

Enter you Lingnan username and password into the “User” and “Password” field respectively (Image 1-1) and then click “Sign in”.

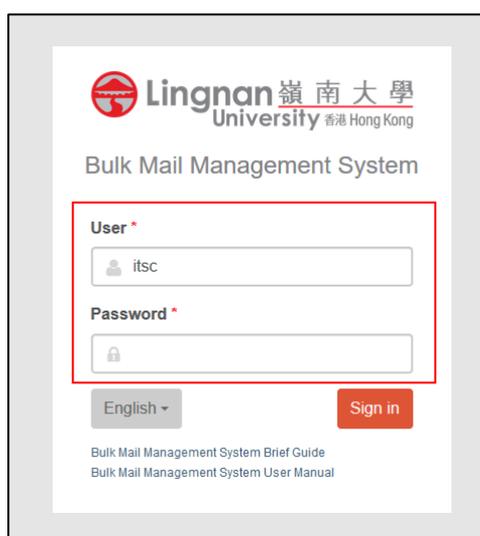


Image 1-1 Login screen

2. Campaign Creation

A “Campaign” refers to a bulk mail. Creating a “Campaign” means creating a bulk mail delivers to multiple recipients.

There are two types of campaign you can create in the bulk mail system, “Mandatory” and “Commercial”.

- **Mandatory Campaign**

This type of campaign will deliver to all selected recipients. Recipients do not have the option to unsubscribe themselves from this kind of campaign.

¹ The bulk mail system supports most of the modern browsers, such as Chrome, Firefox or Internet Explorer.

- Commercial Campaign

The recipients can unsubscribe themselves from this type of campaign. There is an individual subscription list named after each department.

2.1. Creation of Mandatory Campaign

Step 1 - Setup

1. Open side menu by clicking the  icon at upper left hand corner. Click “Campaigns” in the menu (Image 2.1-1).

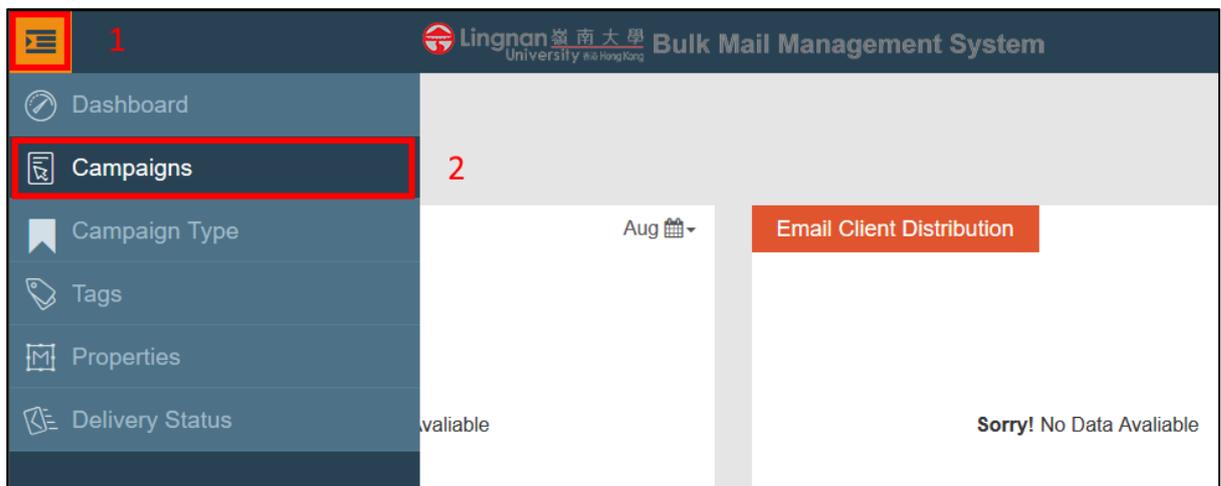


Image 2.1-1 The campaigns menu

2. Click the “Create Campaign” button at the right side (Image 2.1-2).

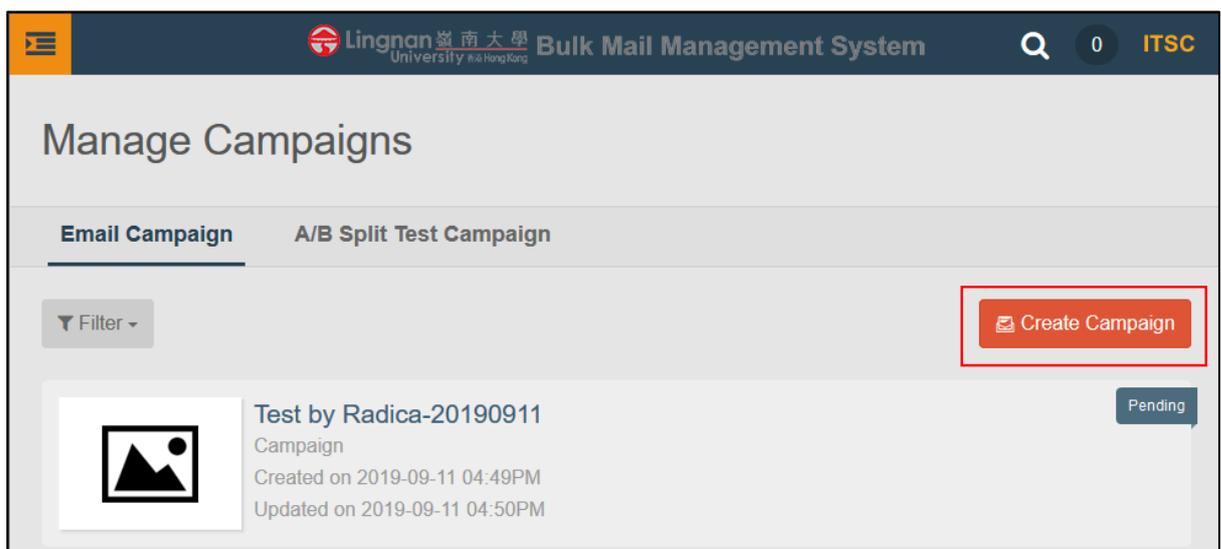


Image 2.1-2 Create campaign button

3. Select “Email Campaign” to proceed (Image 2.1-3).

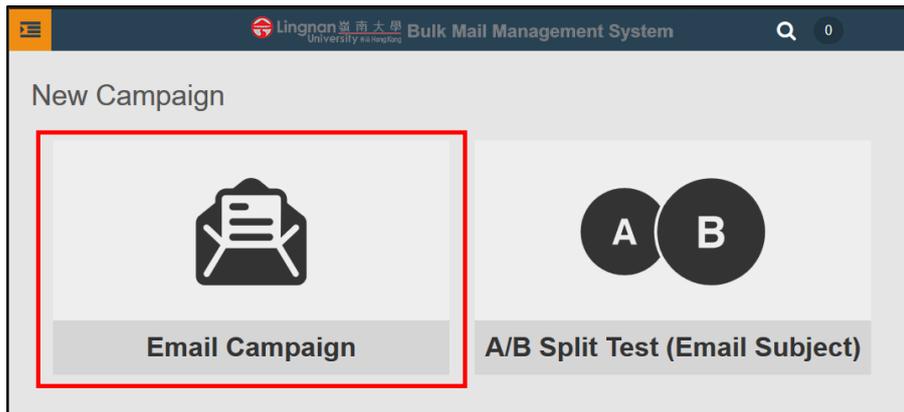
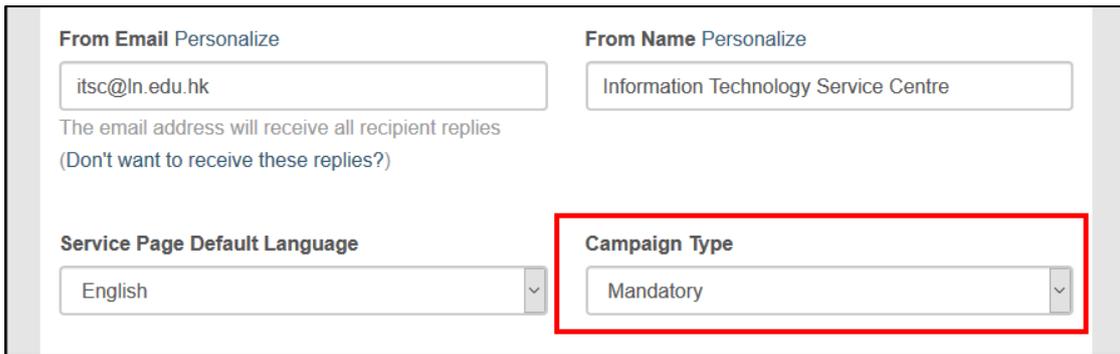


Image 2.1-3 Select “Email Campaign”

4. Fill in necessary information in the “New Campaign” page (Image 2.1-4).
- I. Campaign Name: A unique name which defines the campaign, not the SUBJECT of the email.
 - II. Subject: The subject of the email.
 - III. From Email: Sender email address (your departmental email address).
 - IV. From Name: Display name of the sender email address (name of your department).

Image 2.1-4 Campaign Information

5. Select “Mandatory” in “Campaign Type” (Image 2.1-5).



The screenshot shows a configuration interface with two columns. The left column has a 'From Email Personalize' field with the value 'itsc@ln.edu.hk' and a 'Service Page Default Language' dropdown set to 'English'. The right column has a 'From Name Personalize' field with the value 'Information Technology Service Centre' and a 'Campaign Type' dropdown set to 'Mandatory'. The 'Campaign Type' dropdown is highlighted with a red rectangular box.

Image 2.1-5 Campaign Type

6. In the Recipients section, select “Customer Segment” (Image 2.1-6).



The screenshot shows the 'Recipients' section of the interface. At the top, there are two dropdown menus: 'Service Page Default Language' set to 'English' and 'Campaign Type' set to 'Mandatory'. Below these is a 'Recipients' tab with a radio button selection. The 'Customer Segment' option is selected and highlighted with a red rectangular box.

Image 2.1-6 Recipients – Customer Segment

7. Move your mouse cursor over the blue line on the left (Image 2.1-7) to setup segment rules.



The screenshot shows the 'Recipients' section with 'Customer Segment' selected. Below the selection is a section titled 'Include customers who match following conditions'. On the left side of this section, there is a vertical blue line. A red arrow points from this line towards the right. Below the arrow, there is a red box around the blue line and a text instruction: 'Move your mouse over the blue line to set segment rules'.

Image 2.1-7 Set segment rules

- Click "Tag" to open the tag² menu (Image 2.1-8).

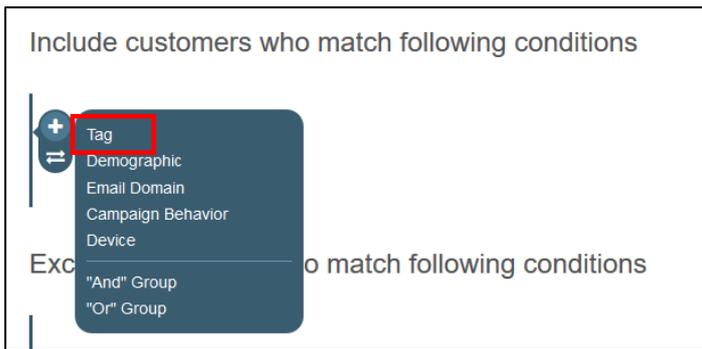


Image 2.1-8 Open Tag menu

- Select the required tag(s) (Image 2.1-9).

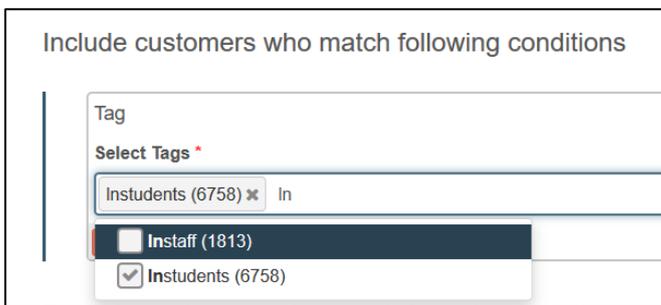


Image 2.1-9 Tag(s) selection

- Click the tick sign  to confirm (Image 2.1-10).

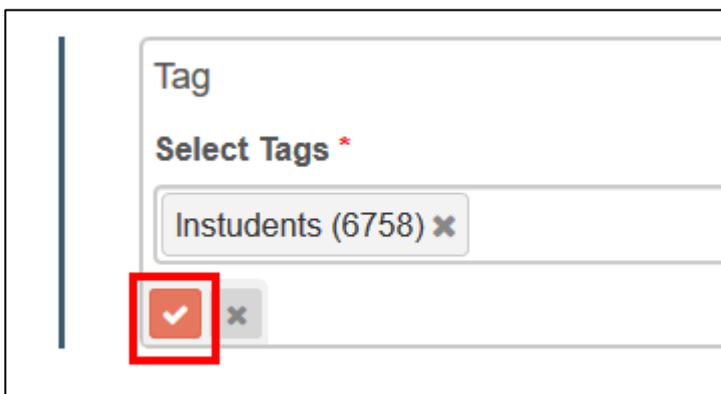


Image 2.1-10 Confirm Tags

² Tag defines a collection of recipients, e.g. "Instaff" includes all the Lingnan staff

11. You may click “Show how many customers involved” to view the total number of recipients in the select tag(s) (Image 2.1-11).

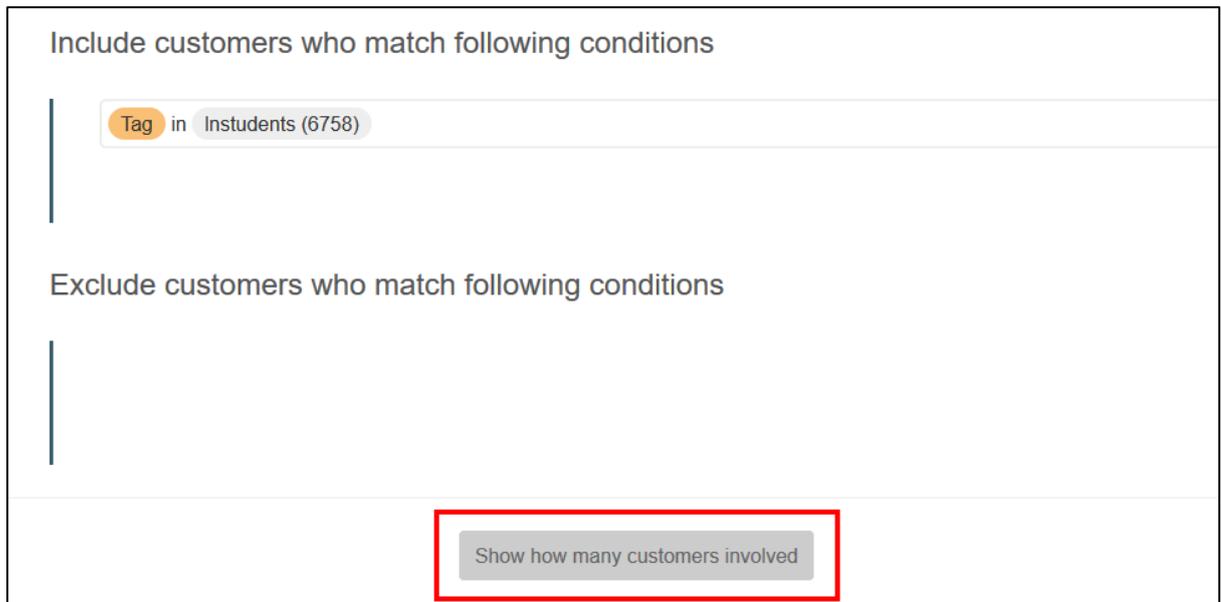


Image 2.1-11 Show total number of recipients in select tag(s)

12. Make sure the check box “I don’t want to send multiple emails to the same email address” is selected to avoid sending duplicate recipient email addresses after combination of different tags.
13. Click “Next” at lower right hand side for template select (Image 2.1-12Image 2.1-12 Click “Next” for template selection).



Image 2.1-12 Click “Next” for template selection

Step 2 - Template

1. Click "Code Your Own" in "Select a Template" (Image 2.1-13).

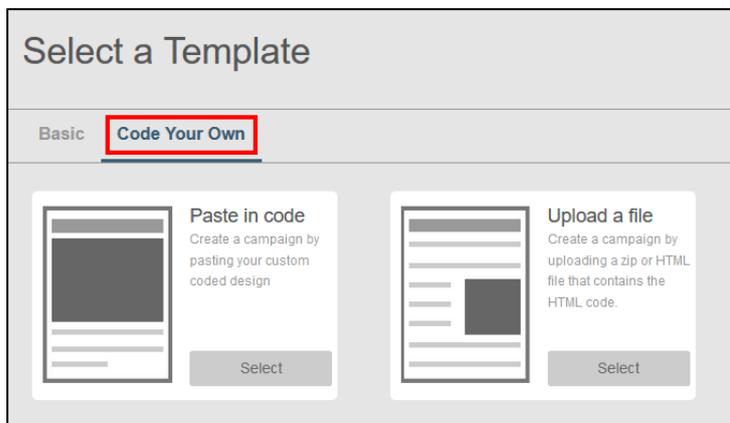


Image 2.1-13 "Code Your Own" for customer content

2. You can upload a prepared HTML file as your campaign content
 - Click "Upload a file" (Image 2.1-14).

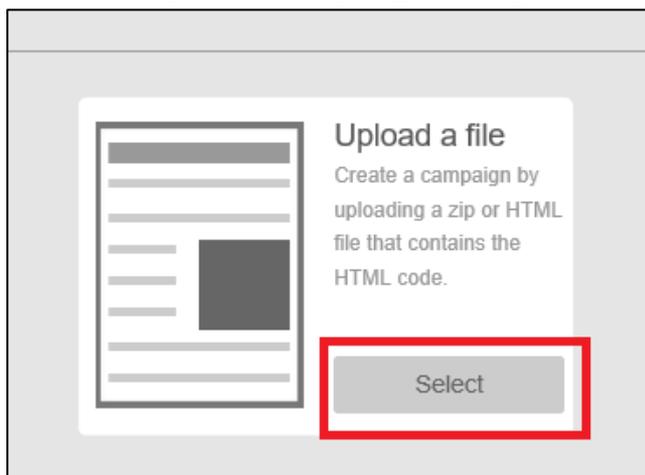


Image 2.1-14 "Update a file" as the content

- Drag and Drop the HTML file or click the button “Click here to select from your computer” to browser your computer for the file (Image 2.1-15).

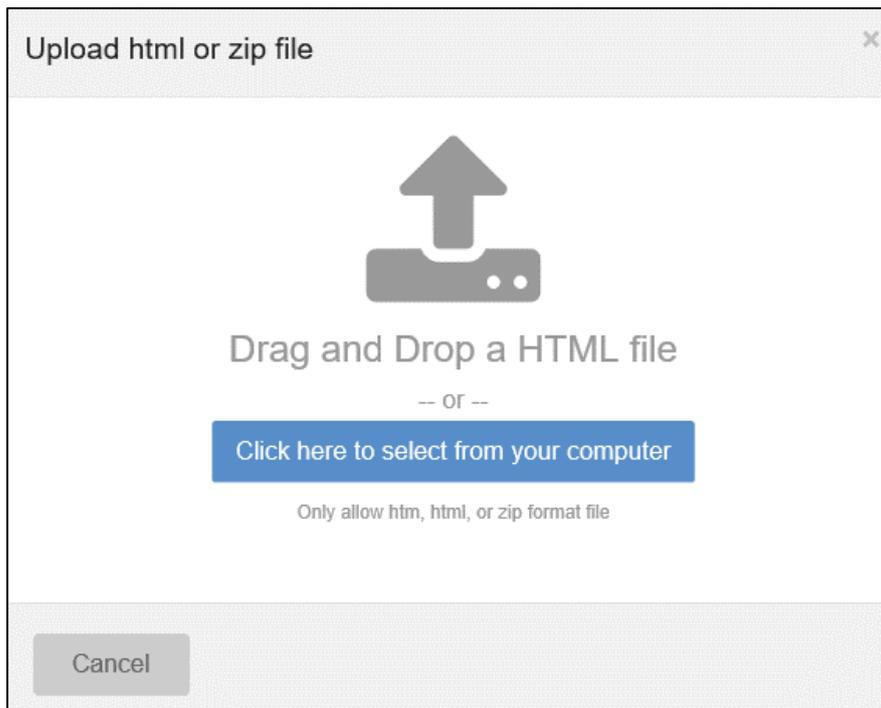


Image 2.1-15 Upload your prepared content

Alternatively, you can create your mail content manually by selecting “Paste in code” (Image 2.1-16).

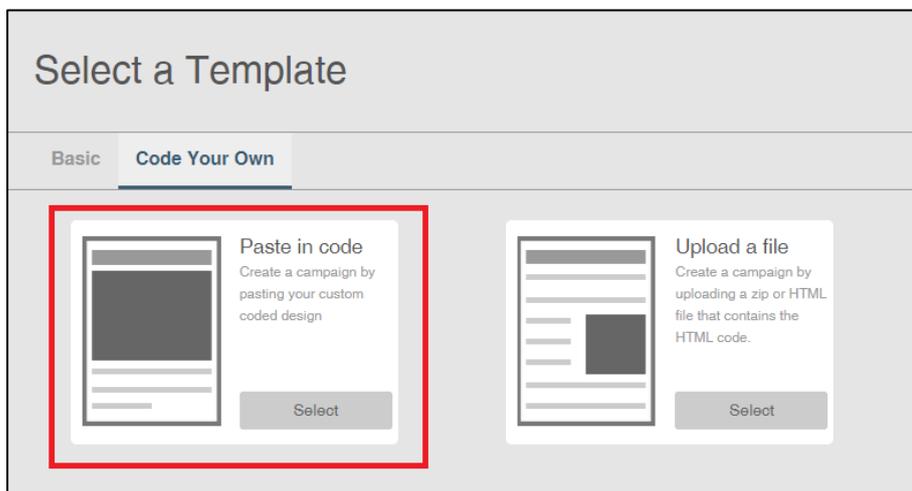


Image 2.1-16 Create content manually by “Paste in code”

Step 3 - Design

1. After processing the template, you will then enter into the “Design View”. You can edit your mail content directly (Image 2.1-17).

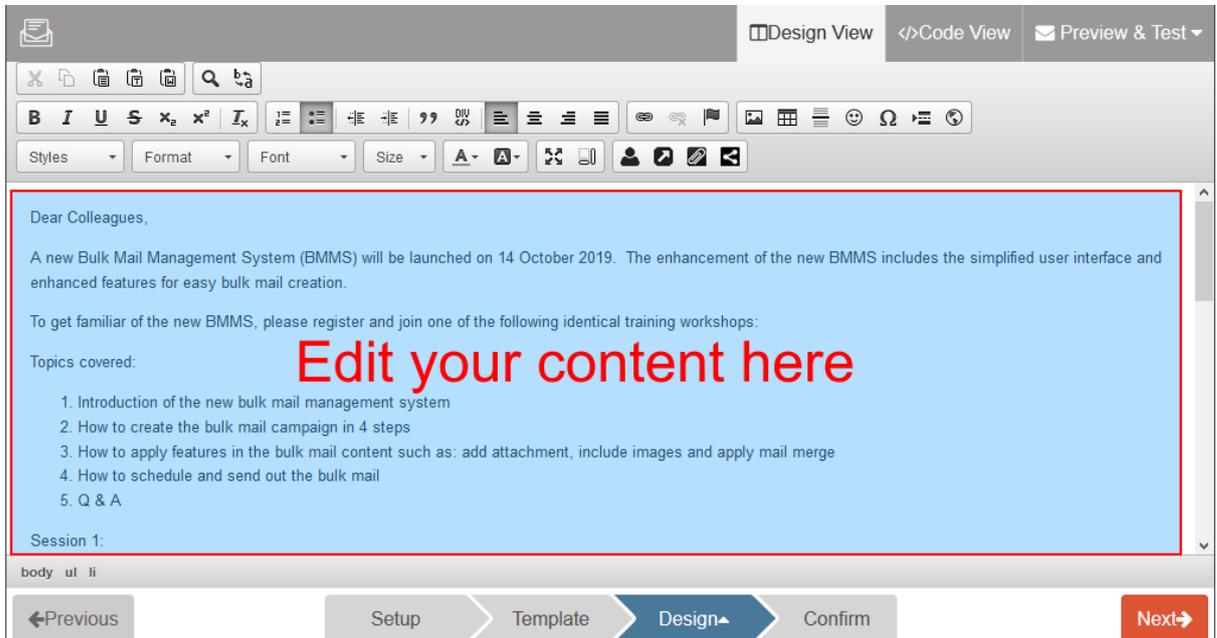


Image 2.1-17 The “Design View” of email content

2. You can preview how your email look and feel when viewed by desktop or mobile client.
 - Click “Preview & Test” on upper right hand side and select “Preview HTML content” (Image 2.1-18).

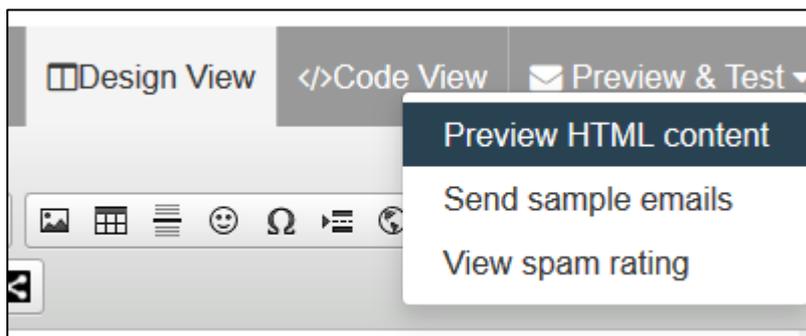


Image 2.1-18 Preview your email

- A preview of your email will be displayed (Image 2.1-19).

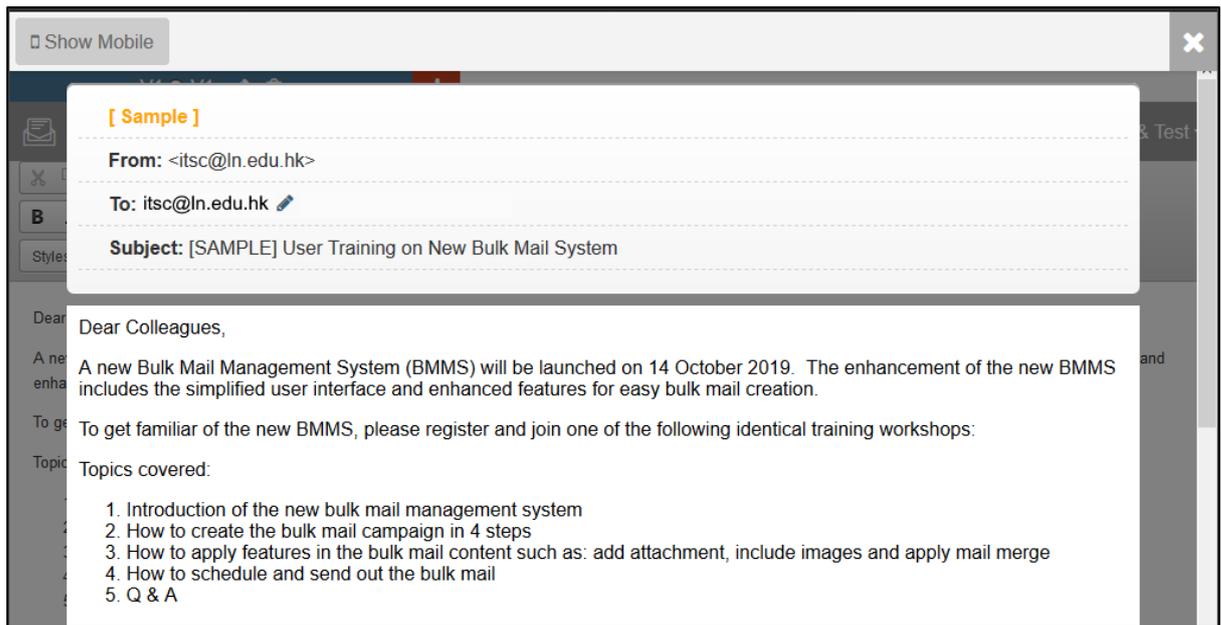


Image 2.1-19 Preview as desktop email client

- To preview your email as a mobile email client, click the “Show Mobile” button on upper left hand corner (Image 2.1-20).

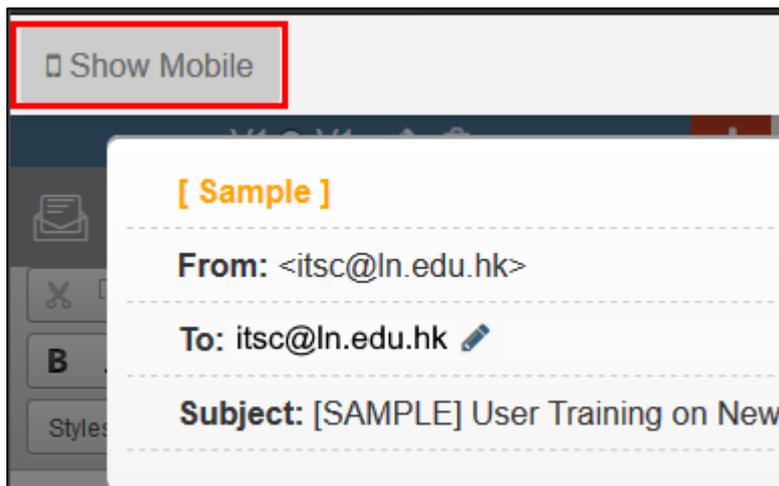


Image 2.1-20 Change to mobile view

- Image 2.1-21 is a mobile preview of the email content.

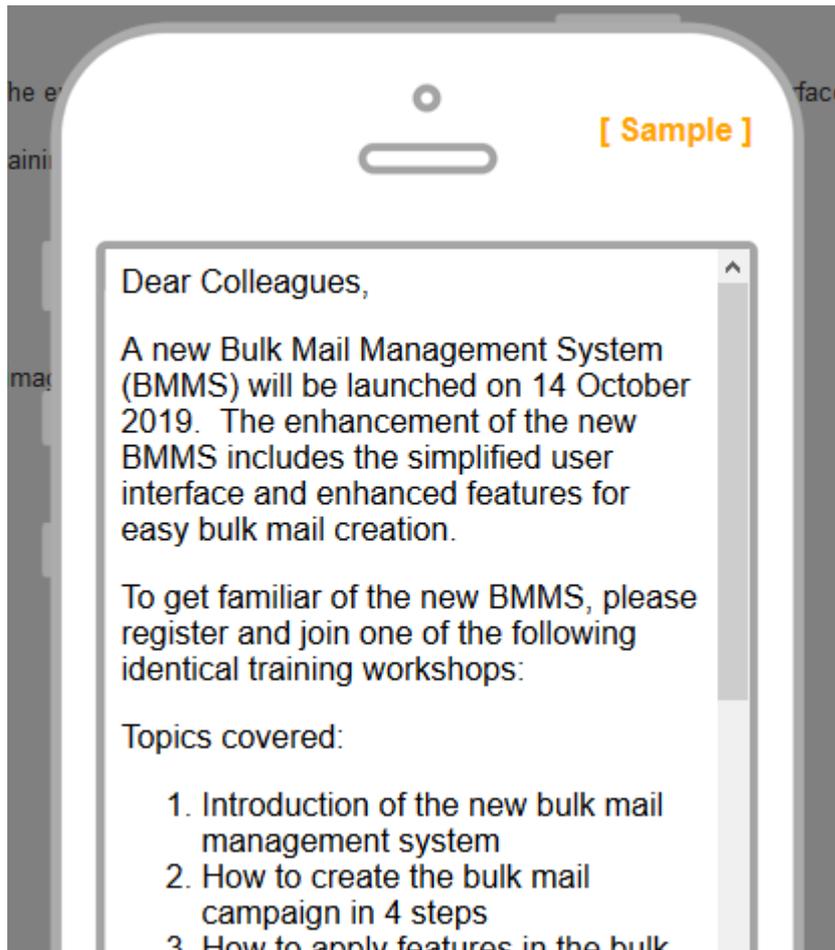


Image 2.1-21 Mobile preview

- 3. To send a sample email, click “Preview & Test” and select “Send sample emails” (Image 2.1-22).

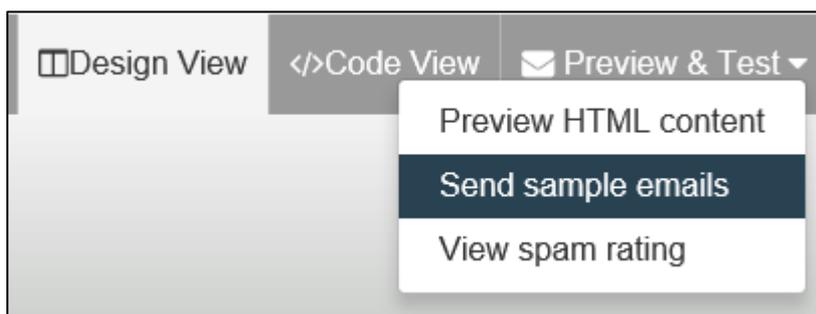
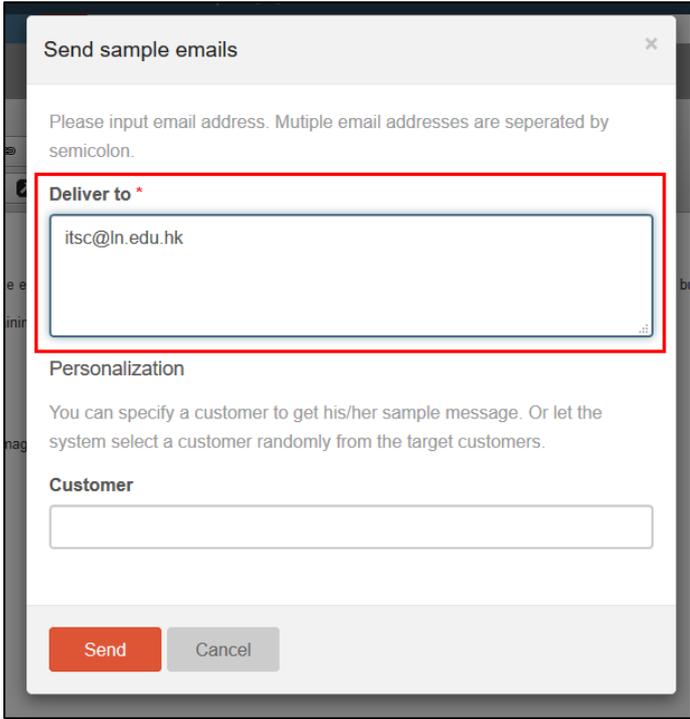


Image 2.1-22 Sending sample emails

4. Enter the recipient email address(es) in “Deliver to” and click “Send” (Image 2.1-23).



Send sample emails

Please input email address. Multiple email addresses are separated by semicolon.

Deliver to *

itsc@ln.edu.hk

Personalization

You can specify a customer to get his/her sample message. Or let the system select a customer randomly from the target customers.

Customer

Image 2.1-23 Preview email recipient(s)

5. Click the “Next” button at lower left hand corner to the final step (Image 2.1-24).

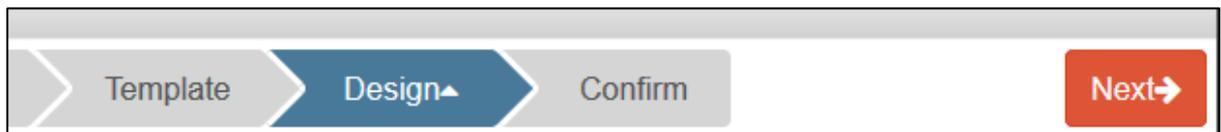


Image 2.1-24 Click “Next” to the final step

Step 4 - Confirm

1. Review the details of the campaign, click the “Edit” button beside any error to correct them (Image 2.1-25).

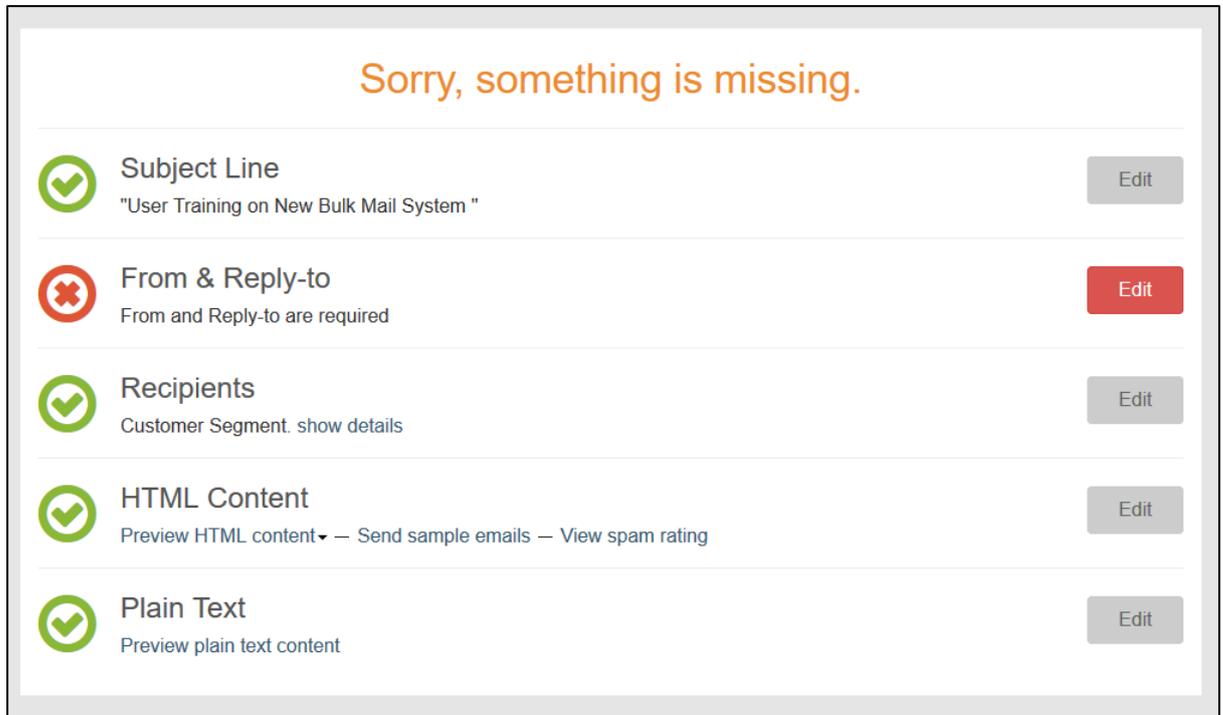


Image 2.1-25 Campaign with error

2. Once all the components of the campaign is correct, you should able to schedule your campaign in “Campaign Schedule”.
 - i. To send the campaign immediately, select “Immediate”.
 - ii. To send the campaign at a specific time, select “Specific time” and choose the date and time to send the campaign (Image 2.1-26).

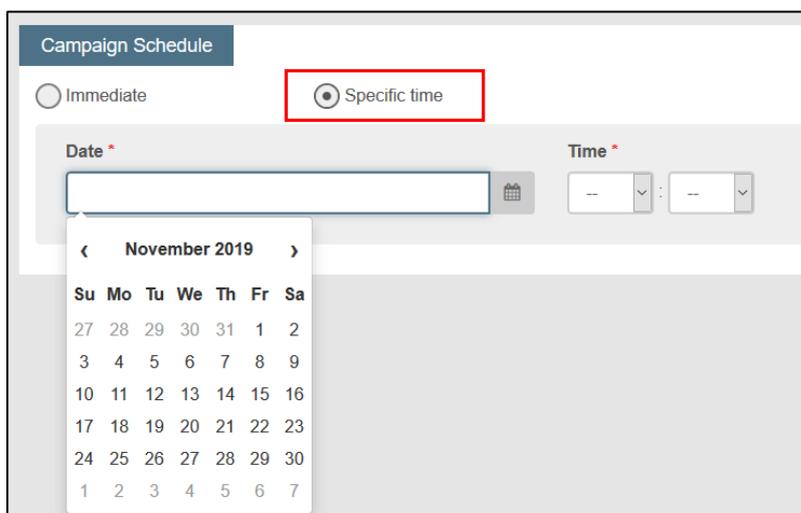


Image 2.1-26 Specify date and time to send the campaign

3. If you do not have the right to approve a campaign, click the “Save” button (Image 2.1-27) and choose the approver to approve your campaign (Image 2.1-28).



Image 2.1-27 Save a campaign for approval

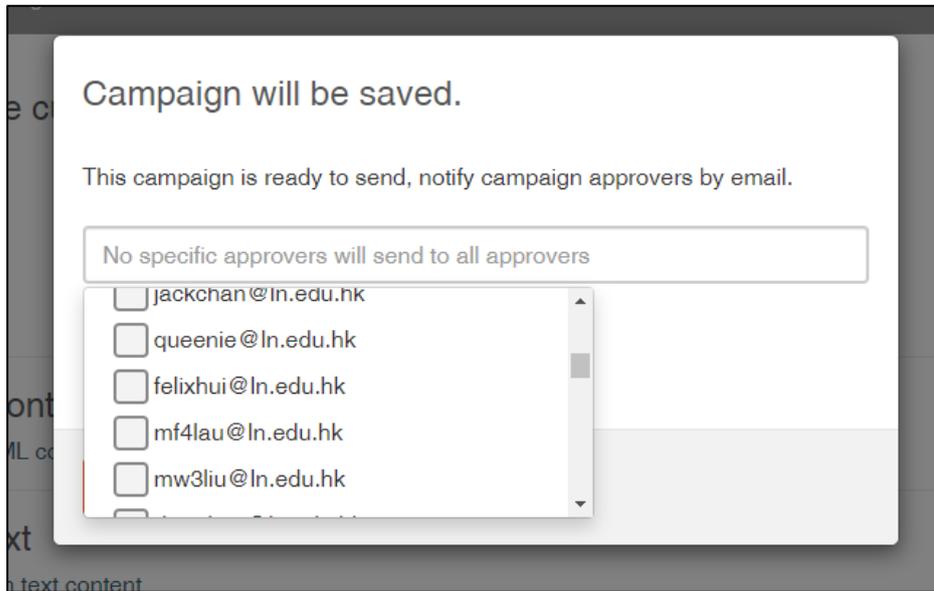


Image 2.1-28 Choose your approver

4. If you have the right to approve a campaign, click the “Start” button at lower right hand corner (Image 2.1-29). You will be asked to confirm the delivery of your campaign. Select “Yes” to confirm or “No” to go back (Image 2.1-30)



Image 2.1-29 Click “Start” to send a campaign

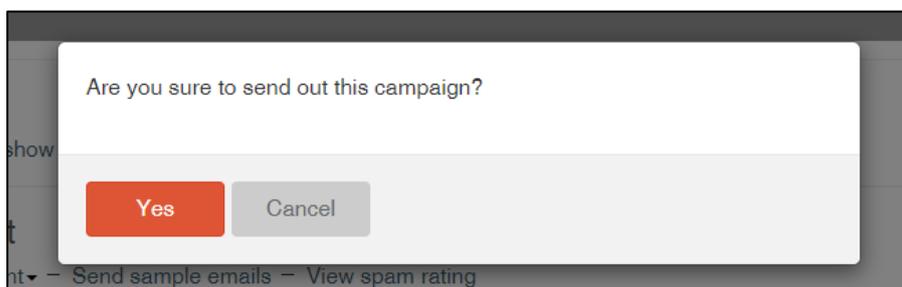


Image 2.1-30 Confirmation of campaign delivery

5. Please note that your campaign will be delivered immediately after approval if you select “Immediate” in campaign schedule.

2.2. Creation of Commercial Campaign

Step 1 - Setup

1. Open side menu by clicking the  icon at upper left hand corner. Click “Campaigns” in the menu (Image 2.2-1).

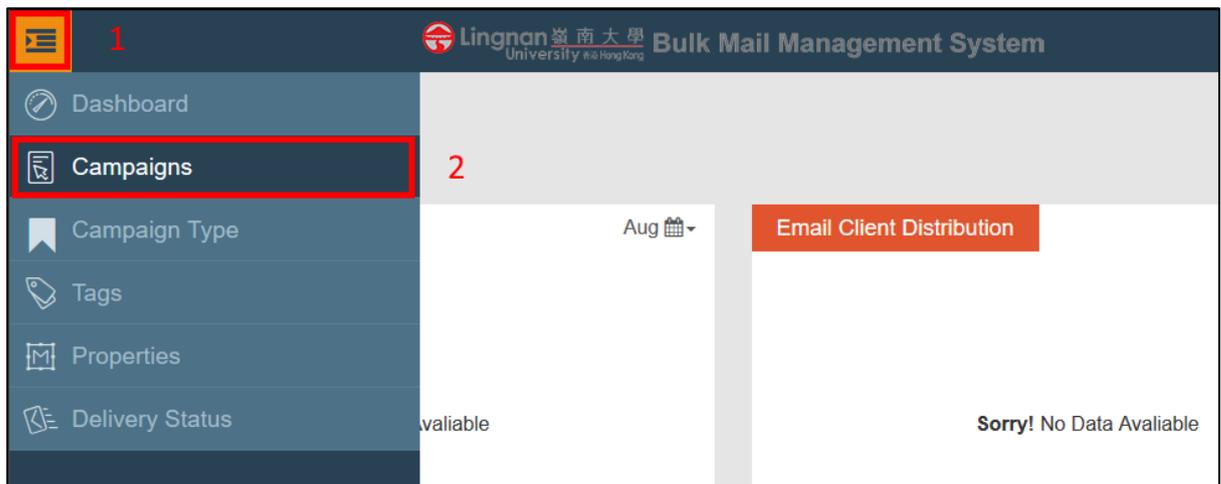


Image 2.2-1 The campaigns menu

2. Click the “Filter” button, type “unsubscribe” in the Campaign Name and then click “OK”.

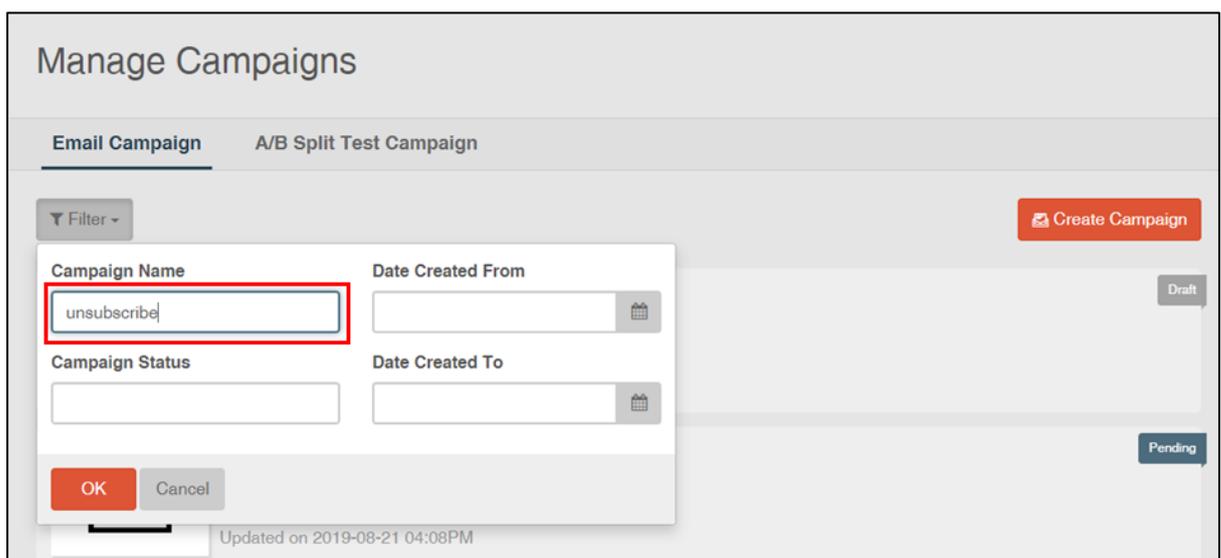


Image 2.2-2 Search for “unsubscribe campaign”

3. Move your mouse to lower right hand corner of the “Lingnan Unsubscribe Template” and click “Duplicate” (Image 2.2-3).

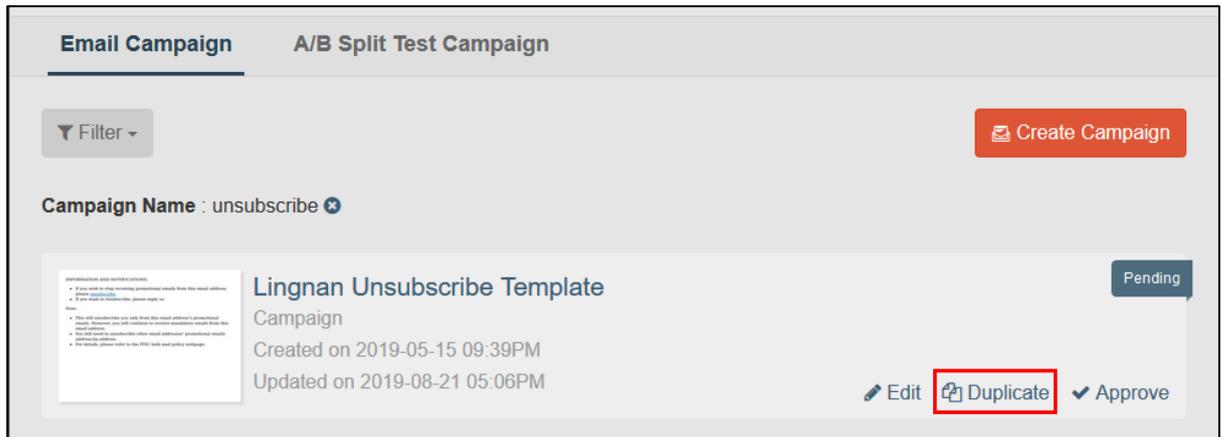


Image 2.2-3 Duplicate the unsubscribe template

4. Complete your campaign information as stated in [procedure 4 of the Step 1 in chapter 2.1](#). Select your department code as your “Campaign Type” (Image 2.2-4).

The image shows a form for configuring a campaign. It has several sections: 'Campaign Name' with a text input field containing 'Your Campaign Name'; 'Subject' with a text input field containing 'Email Subject' and a checkbox for 'Enable [AD] Subject Prefix'; 'From Email Personalize' with a text input field containing 'itsc@ln.edu.hk'; 'From Name Personalize' with a text input field containing 'Information Technology Services Centre'; 'Service Page Default Language' with a dropdown menu set to 'English'; and 'Campaign Type' with a dropdown menu set to 'ITSC', which is highlighted with a red box.

Image 2.2-4 Select department code in “Campaign Type”

5. Follow [procedures 6 to 13 of Step 1 in Chapter 2.1](#) to complete recipient selection.

Step 2 - Template

1. In “Select a Template”, click “Next” directly (Image 2.2-5).

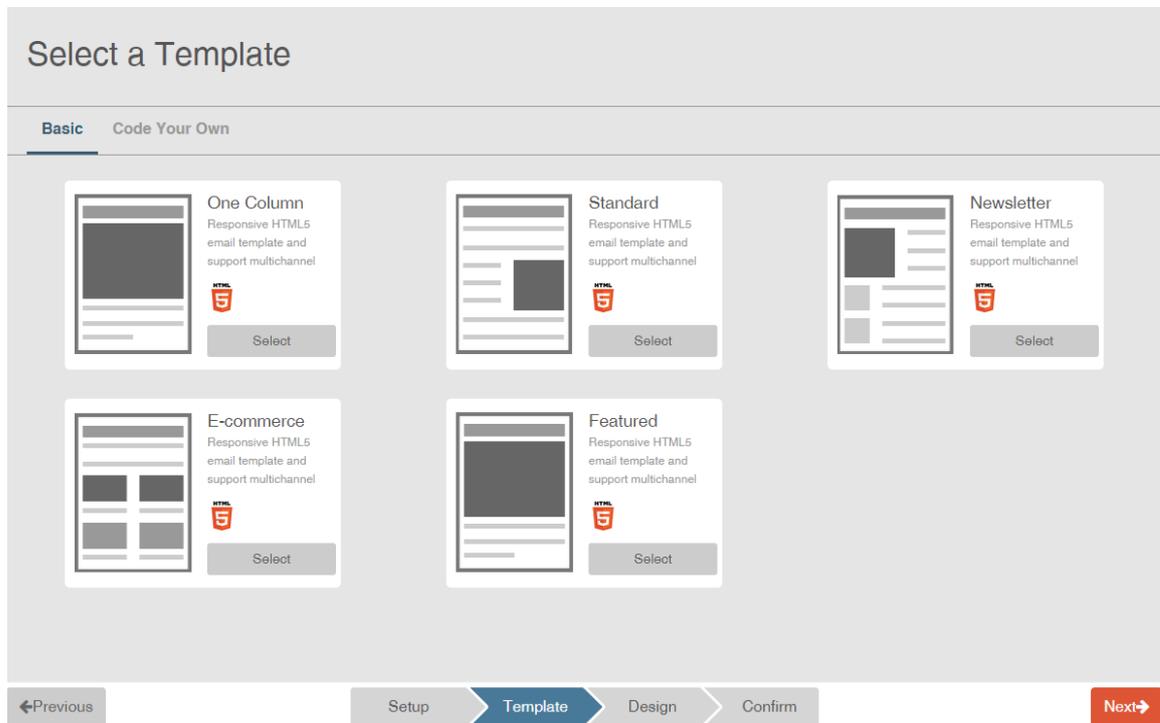


Image 2.2-5 Click “Next” without selecting any templates

Step 3 - Design

1. In the “Design View”, insert your content above the line “INFORMATION AND NOTIFICATIONS” (Image 2.2-6).

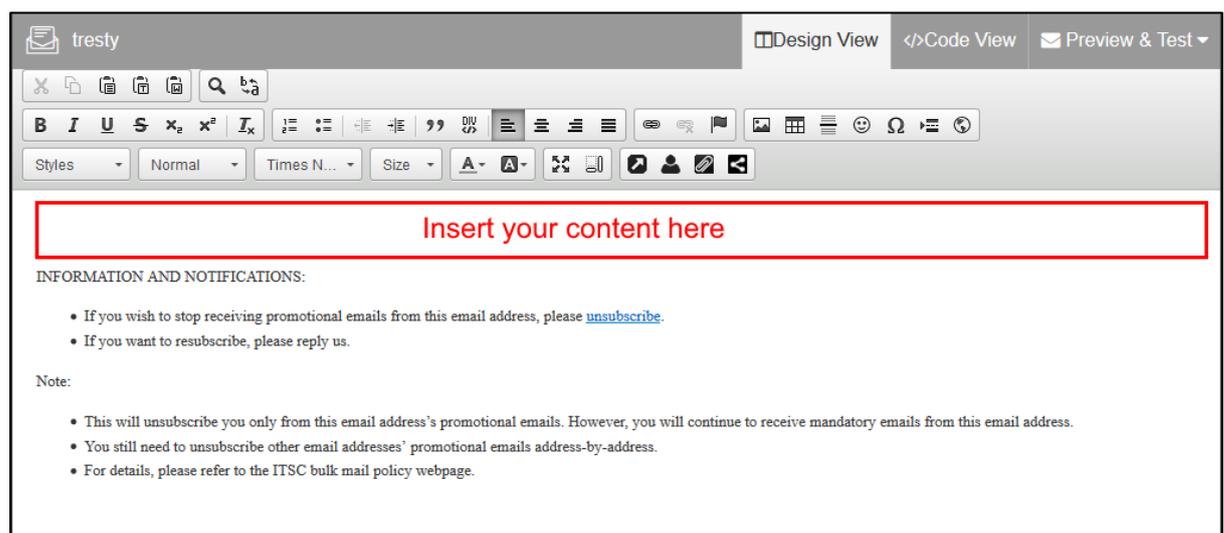


Image 2.2-6 Insert your content

2. Complete the other procedures stated of [Step 3 in Chapter 2.1](#) and click “Next”.

Step 4 - Confirm

1. Confirm your campaign as stated in [Chapter 2.1 Step 4](#).

3. More about Campaign

3.1. Campaign Management

1. Open side menu by clicking the  icon at upper left hand corner. Click “Campaigns” in the menu (Image 3.1-1).

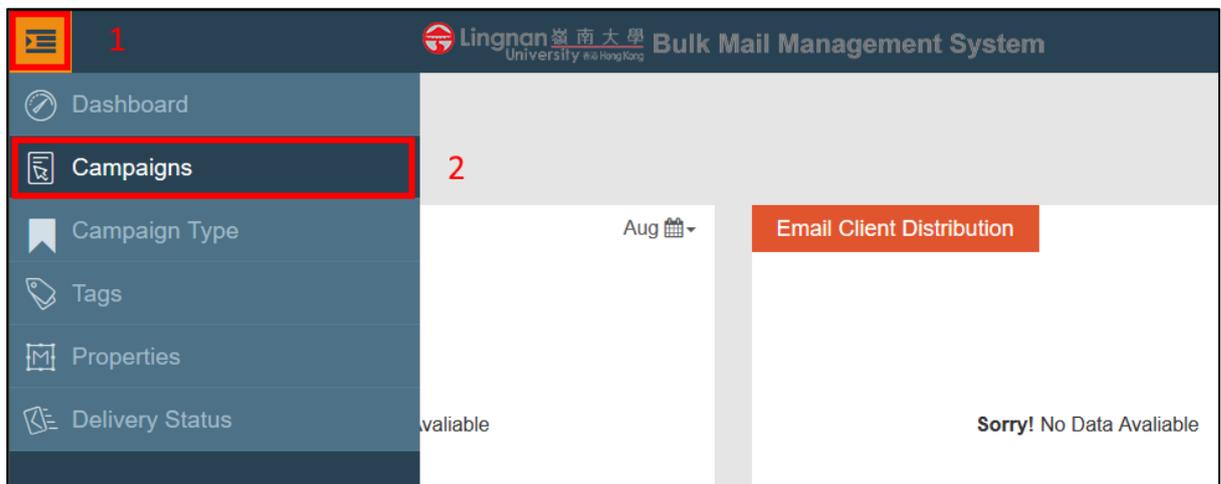


Image 3.1-1 The campaigns menu

- A list of campaigns will be listed (Image 3.2-2).

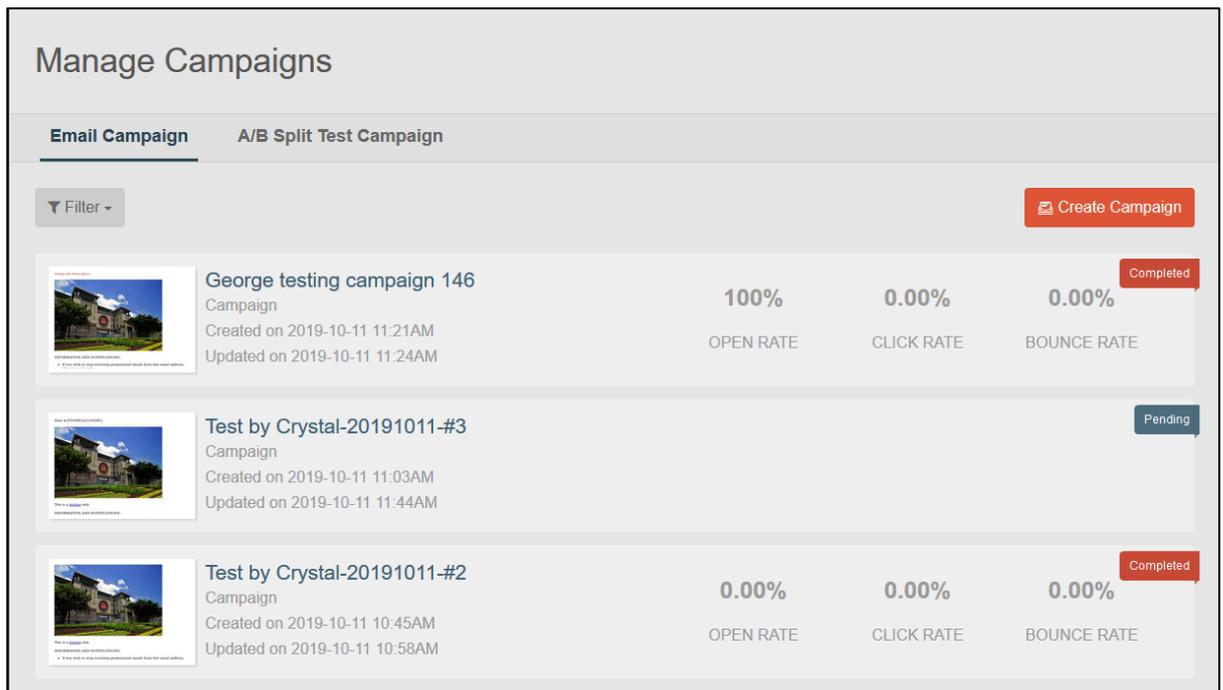


Image 3.1-2 List of campaigns

- If the status of a campaign is “Draft” or “Pending”, move your mouse over to the campaign will allow you to edit or duplicate it (Image 3.1-3).



Image 3.1-3 Mouse over the campaign to edit it

- You can “Abort” a scheduled campaign which marked as “Ready” (Image 3.1-4).

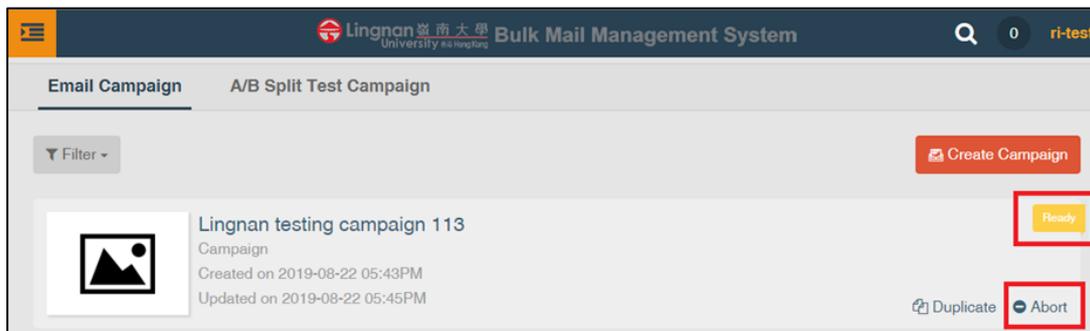


Image 3.1-4 Abort a scheduled campaign

- Statistics will be displayed when the status of a campaign is “Completed” (Image 3.1-5).



Image 3.1-5 Campaign statistics

- To duplicate an existing campaign, click the “Duplicate” button.

3.2. Campaign Approval

- To approve a campaign, login with a user with the approval rights.

- Open side menu by clicking the  icon at upper left hand corner. Click “Campaigns” in the menu (Image 3.2-1).

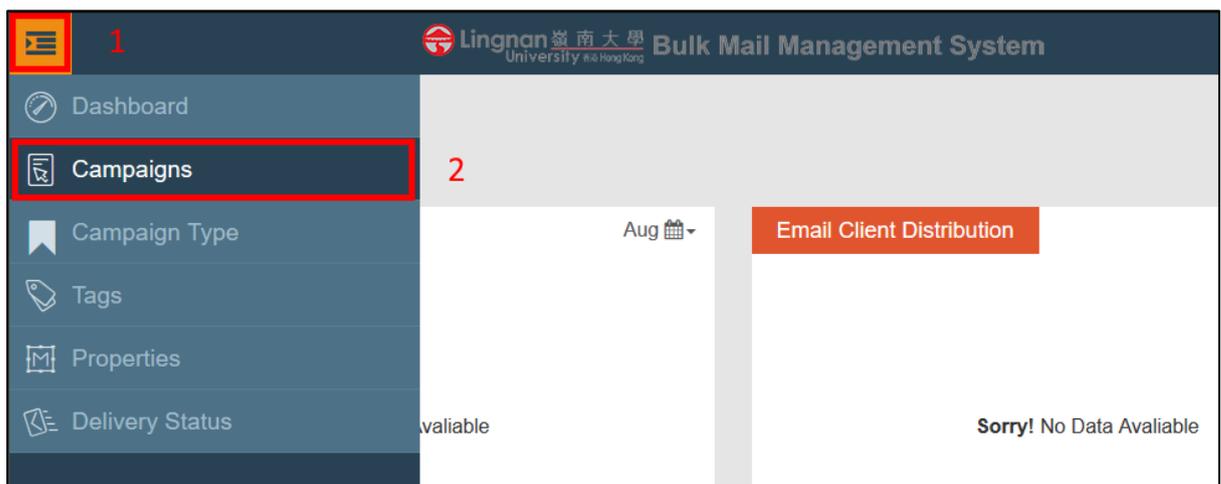


Image 3.2-1 The campaigns menu

- Search for the campaign pending for approval (Image 3.2-2).

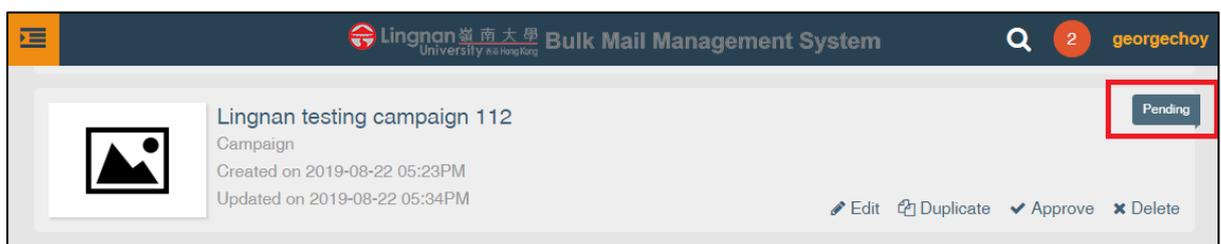


Image 3.2-2 Campaign pending for action

- As an approver, you may review the campaign and perform corresponding actions (Image 3.2-3).



Image 3.2-3 Approver's actions

- Click "Approve" to approve the campaign, the campaign will be sent by the date and time set.
- Click "Edit" to view and edit the campaign.
- Click "Duplicate" if you want to create another campaign with the same campaign template for future use.
- Click "Delete" to delete the campaign.

4. Customizing your Campaign

4.1. Working with Tags (Contact Lists)

Tags is a collection of contacts which is equivalent to contact lists. There are couples of pre-built tags like "Instaff" and "Instudents".

4.1.1. View the tags

- You can view all the tags by clicking the "Tags" button (Image 4.1-1).

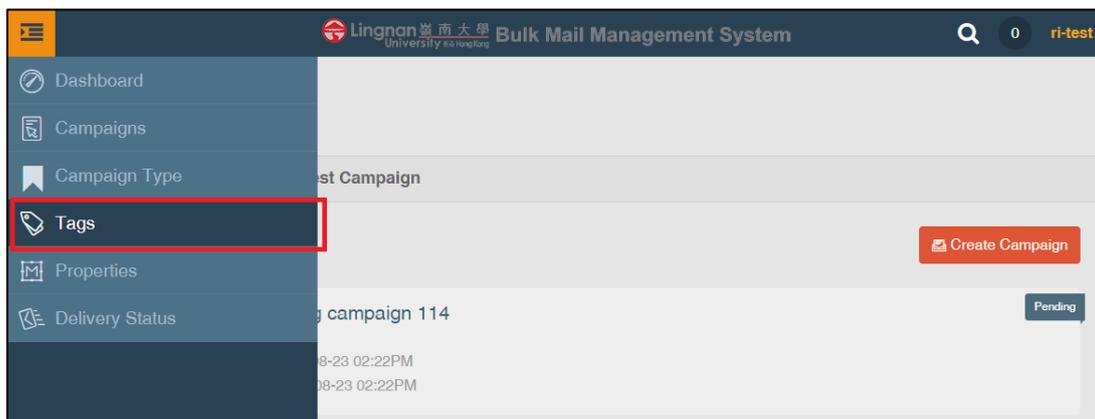


Image 4.1-1 View the tags

- Existing tags (lists) are shown. To explore the system generated list(s) and their descriptions, click “Tag Description” (Image 4.1-2).

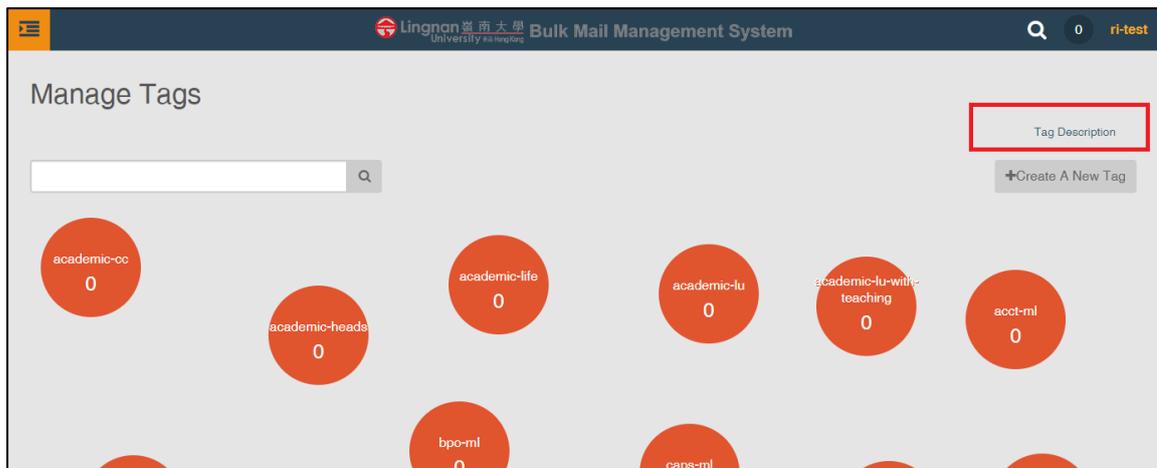


Image 4.1-2 Lists of Tags

- A detailed tag description document will be shown (Image 4.1-3).

Tag Name	Tag Description
academic-cc	All academic staff under CC
academic-heads	Academic Unit Heads Including Heads of CEAL & CLEAC
academic-life	All academic staff under LIFE
academic-lu	All academic staff under LU
academic-lu-with-teaching	All academic staff under LU, including teaching staff (e.g. Part-time Lecturer)
acct-ml	Dept of Accountancy
ad-ac-prog	Assc of Business Studies (Accounting)
ad-ag-prog	Assc of Social Sciences (Applied Gerontology)
ad-ays-prog	Assc of Social Sciences
ad-bsci-prog	Assc of Social Sciences (Behaviorial Science)
ad-cmw-prog	Assc of Arts (Chinese Media Writing)
ad-fs-prog	Assc of Business Studies (Financial Services)
ad-hr-prog	Assc of Business Studies (Human Resources Management)
ad-mk-prog	Assc of Business Studies (Marketing)
ad-phl-prog	Assc of Arts (PHL)
ad-scml	Assc of Business Studies
ad-ss-prog	Assc of Social Sciences

Image 4.1-3 Definition of system generated tags

4.1.2. Segment

“Segment” is a function for users to select only portion of the list.

While creating a bulk mail campaign in [procedure 6 of “Step 1 – Setup”](#), tags (customer list) were selected as the recipients of the campaign. Additional conditions could also be setup to control who will receive the campaign and who will not.

1. For example, if you want to send only to the “fourth year students”, you may first choose the tag “Instudents” (Image 4.1-4).

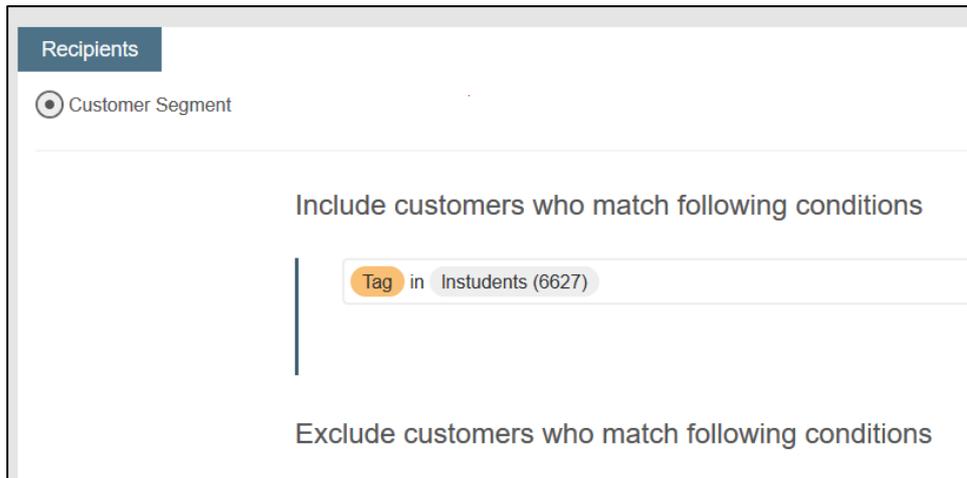


Image 4.1-4 Selecting the tag

2. Move your mouse cursor to the straight line on the left, then add a condition by clicking “Demographic”. Change the condition to [STUDENT_TYPE is “Fourth Year”]. Click  to finish (Image 4.1-5).

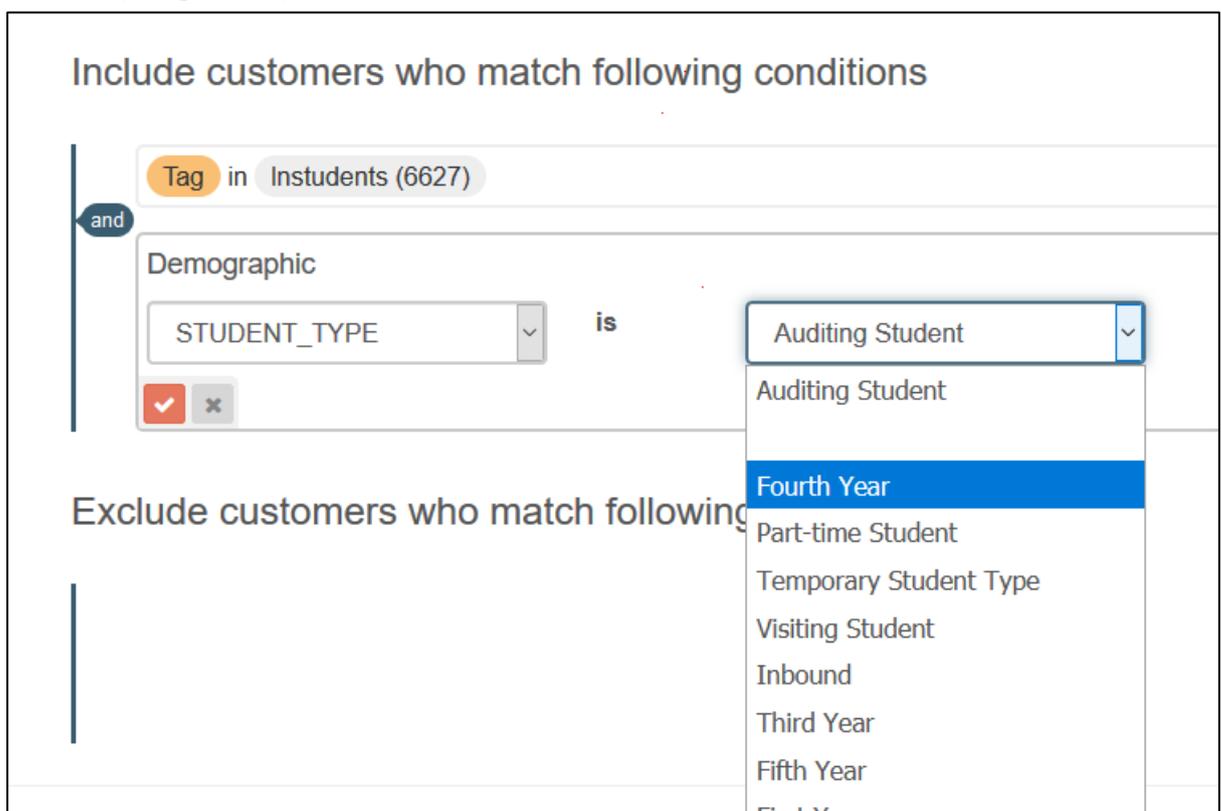


Image 4.1-5 Creating conditions

3. You can add more conditions to create a more precise group of recipients.

4.2. Working with Contents

4.2.1. Adding Attachments

1. You can add attachment to the bulk mail by clicking “Attachment” button in the “Design” tab (Image 4.2-1). The total size of attachment(s) per campaign cannot exceed ONE megabyte (1MB).



Image 4.2-1 Adding attachment to the bulk mail

2. Drag and drop your attachment file into the highlighted area to add your attachment (Image 4.2-2).

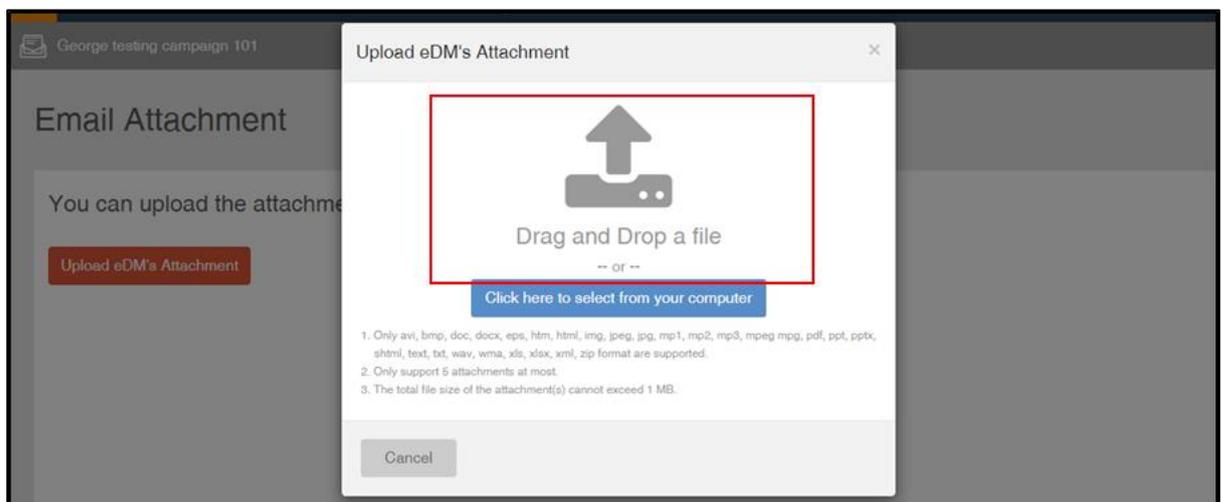


Image 4.2-2 Drag and drop the attachment file

4.2.2. Adding images

1. Click the image icon on the editor bar (Image 4.2-3).



Image 4.2-3 The image icon

2. Click the “upload” button (Image 4.2-4), drag and drop your image file into the highlighted area (Image 4.2-5).

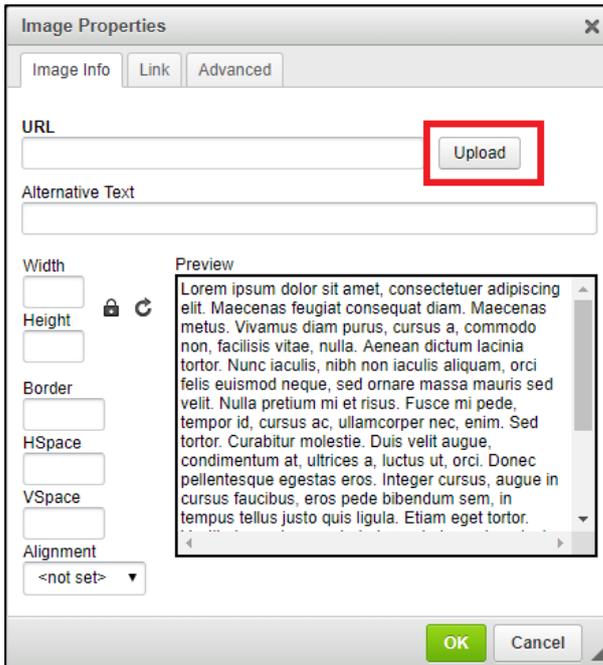


Image 4.2-4 Upload the image file to the bulk mail content

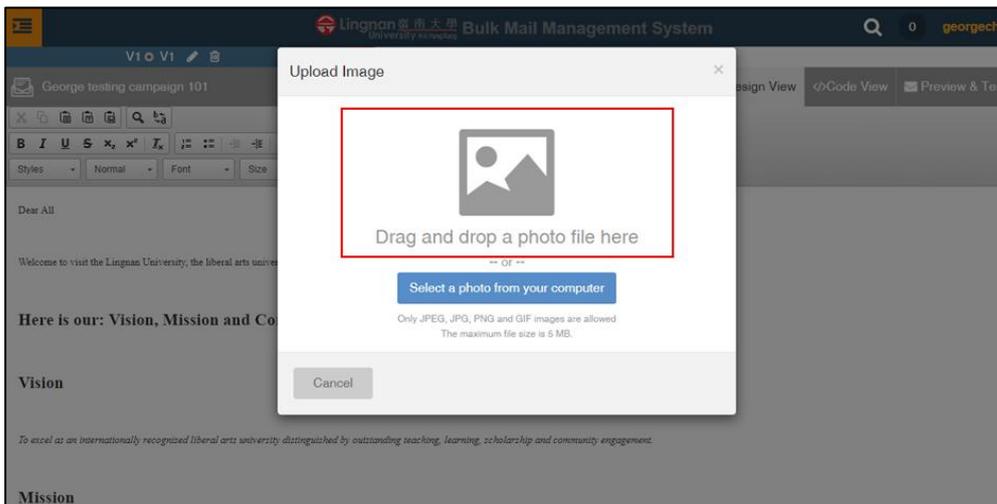


Image 4.2-5 Upload the image file to the bulk mail content

3. The image should be inserted into the email content (Image 4.2-6).

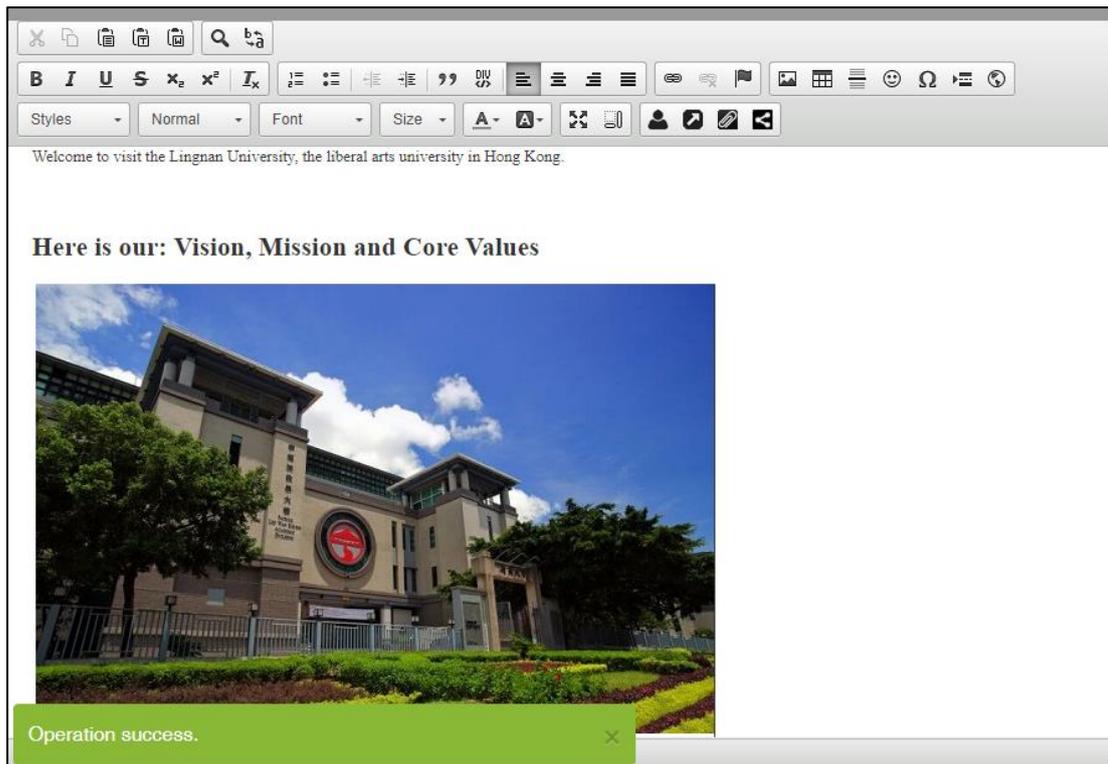


Image 4.2-6 Email content with image inserted

The resolution of the image file should less than 800 x 1130 pixels. Image larger than this resolution may fail to display in certain mail clients (e.g. Microsoft Outlook).

4.2.3. Creating Web Links

1. Highlight the text that you want to insert the web link (Image 4.2-7).



Image 4.2-7 Highlight the text that you want to apply link

2. Click the link icon on the editor bar (Image 4.2-8).



Image 4.2-8 The link icon

3. Then enter the URL address and click “OK” (Image 4.2-9).

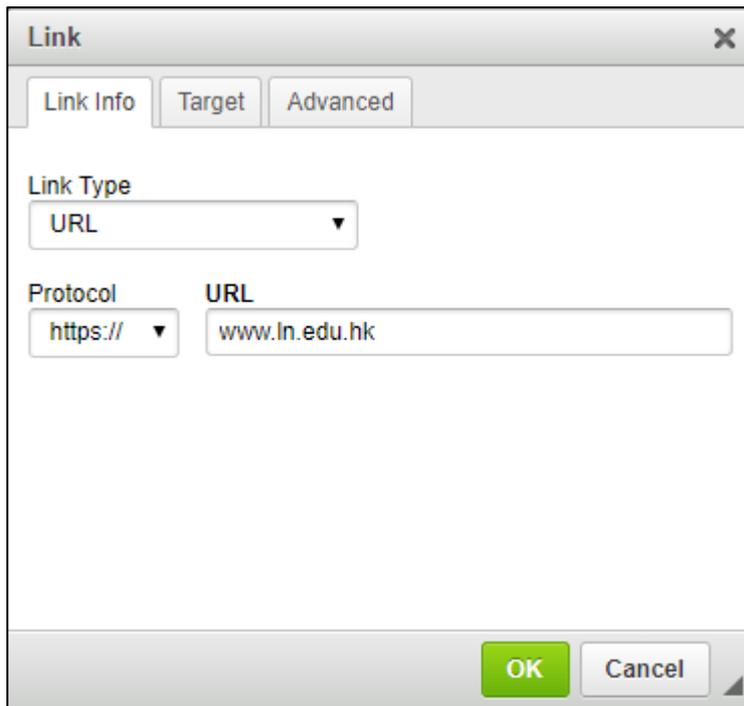


Image 4.2-9 Configure the text link

4.3. Manual Creation of Un-subscription Link

Apart from copying from the duplicating the “Lingnan Unsubscribe Template” as stated in [Chapter 2.2](#), you can also create the un-subscription link manually.

4.3.1. Campaign without using Built-in Template

1. For campaign created without using built-in template, access to the design view of your message.

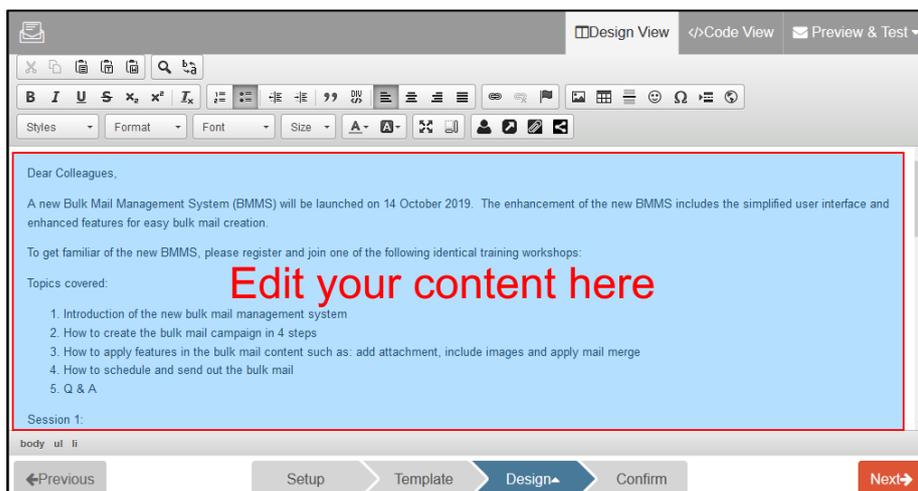


Image 4.3-1 Design View

- Copy the following paragraphs into the campaign contents:

INFORMATION AND NOTIFICATIONS:

- If you wish to stop receiving promotional emails from this email address, please unsubscribe.
- If you want to re-subscribe, please reply us.

Note:

- This will unsubscribe you only from this email address's promotional emails. However, you will continue to receive mandatory emails from this email address.
- You still need to unsubscribe other email addresses' promotional emails address-by-address.
- For details, please refer to the ITSC bulk mail policy webpage.

- Select the word "unsubscribe" in the paragraph. (Image 4.3-2)

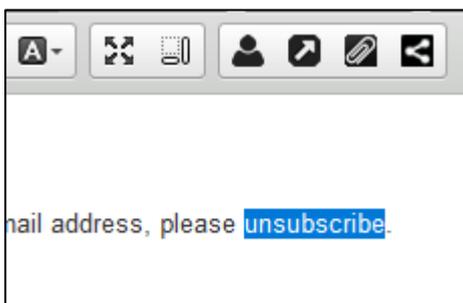


Image 4.3-2 Select the word "unsubscribe"

- Click the "Insert Special Hyperlink" button and select "Unsubscribe" (Image 4.3-3).

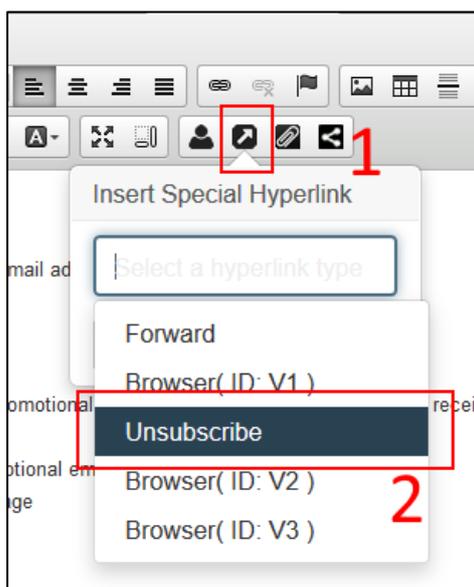


Image 4.3-3 Click and select "Unsubscribe"

5. The selected text will change into a un-subscription link (Image 4.3-4).

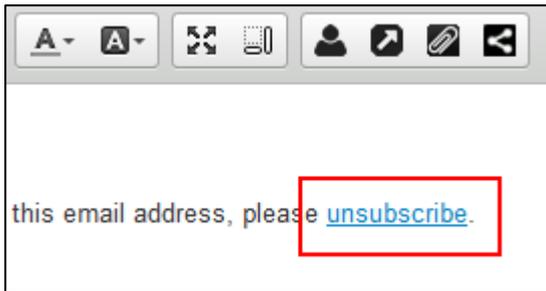


Image 4.3-4 Un-subscription link

4.3.2. Campaign using Built-in Template

When using built-in template to create your campaign (Image 4.3-5), you are required to append the un-subscription information to your campaign manually.

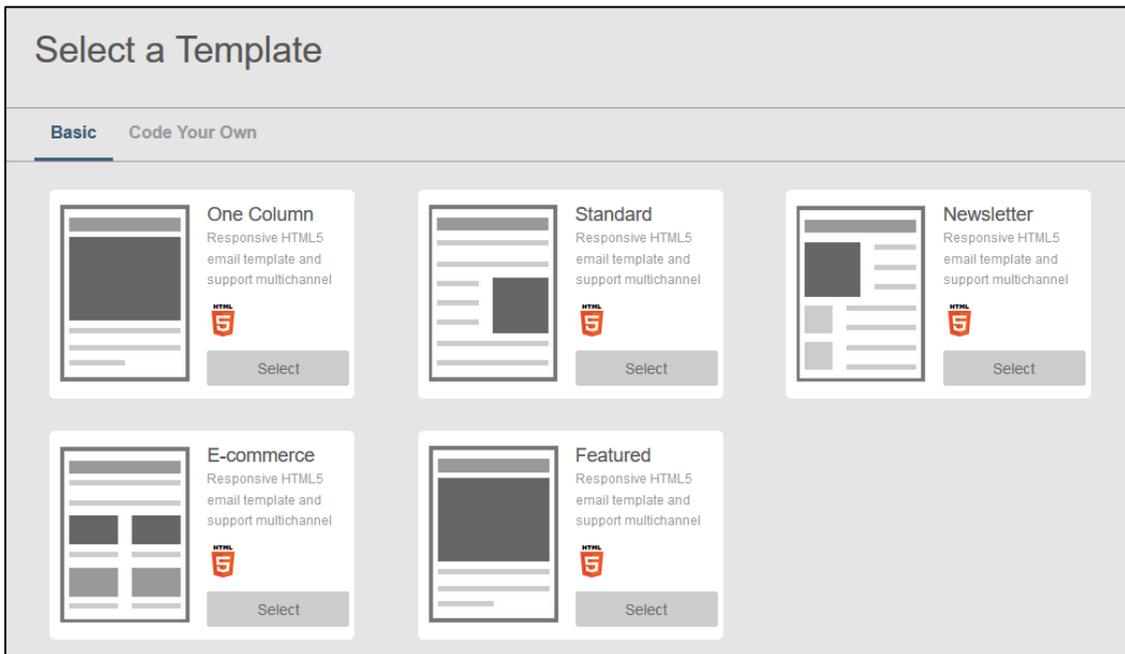


Image 4.3-5 Select a built-in template

1. In the message contents, you can select and delete contents in one of the content boxes (Image 4.3-6).

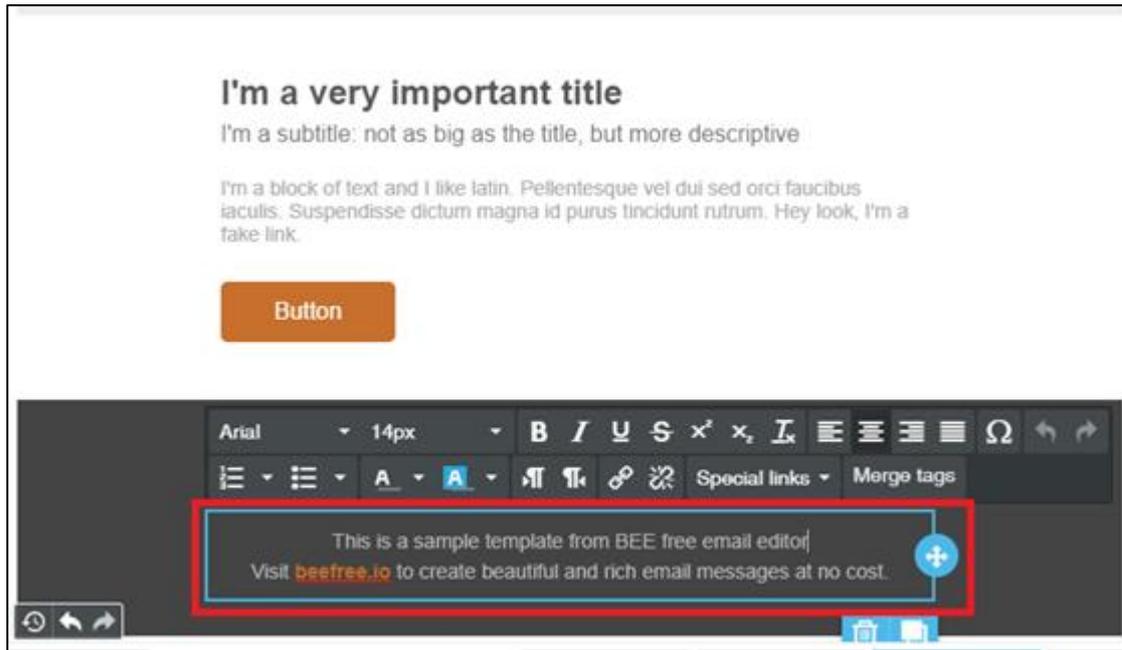


Image 4.3-6 Delete content in content box

2. Copy the following paragraphs into the content box:

INFORMATION AND NOTIFICATIONS:

- If you wish to stop receiving promotional emails from this email address, please unsubscribe.
- If you want to re-subscribe, please reply us.

Note:

- This will unsubscribe you only from this email address's promotional emails. However, you will continue to receive mandatory emails from this email address.
- You still need to unsubscribe other email addresses' promotional emails address-by-address.
- For details, please refer to the ITSC bulk mail policy webpage.

3. Format the contents if necessary (Image 4.3-7).

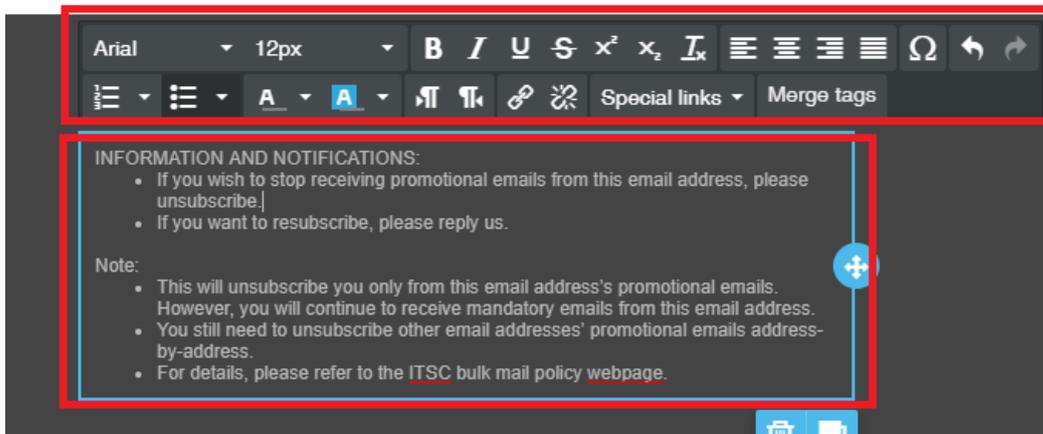


Image 4.3-7 Formatting content

4. Select the word “unsubscribe”. Click “Special Links” → “RiMANNGIS” and then select “Unsubscribe” (Image 4.3-8).

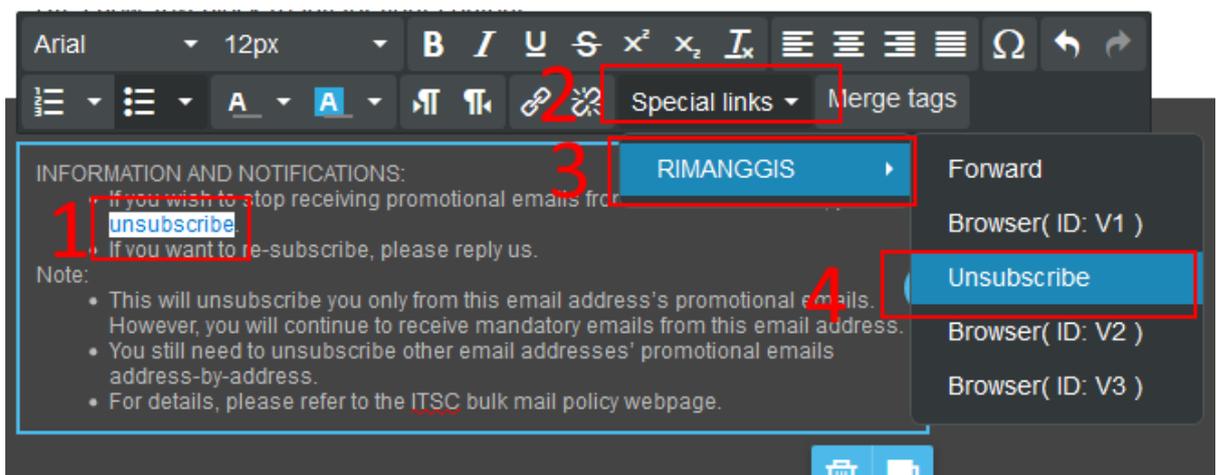


Image 4.3-8 Change selected text into un-subscription link

5. The selected text will turn into the un-subscription link (Image 4.3-9).

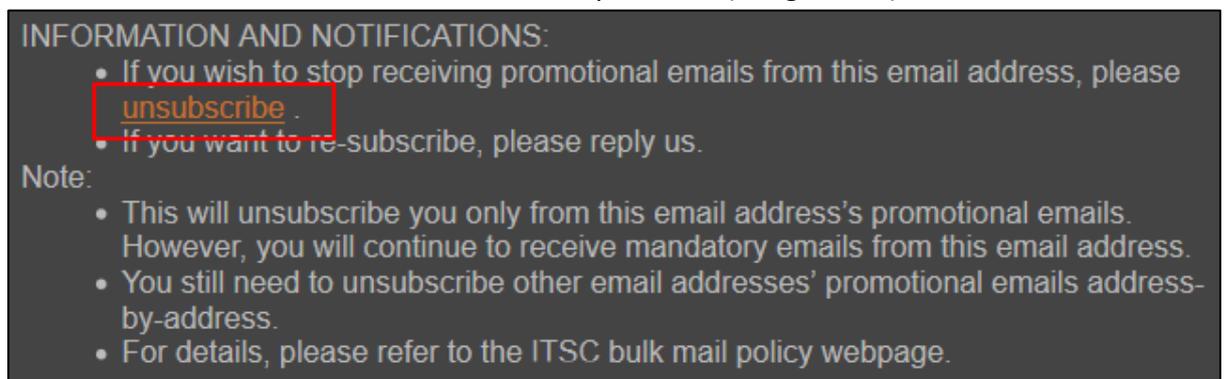


Image 4.3-9 Un-subscription link created