User Guide
for
Bulk Mail Management System

Contents

1 Access to the System

Access the bulk mail Management System via the following URL with your internet browser[1]:

https://bulkmail.ln.edu.hk

Click the "Sign in via SSO" button (Image 1-1) and login by SSO (Image 1-2).

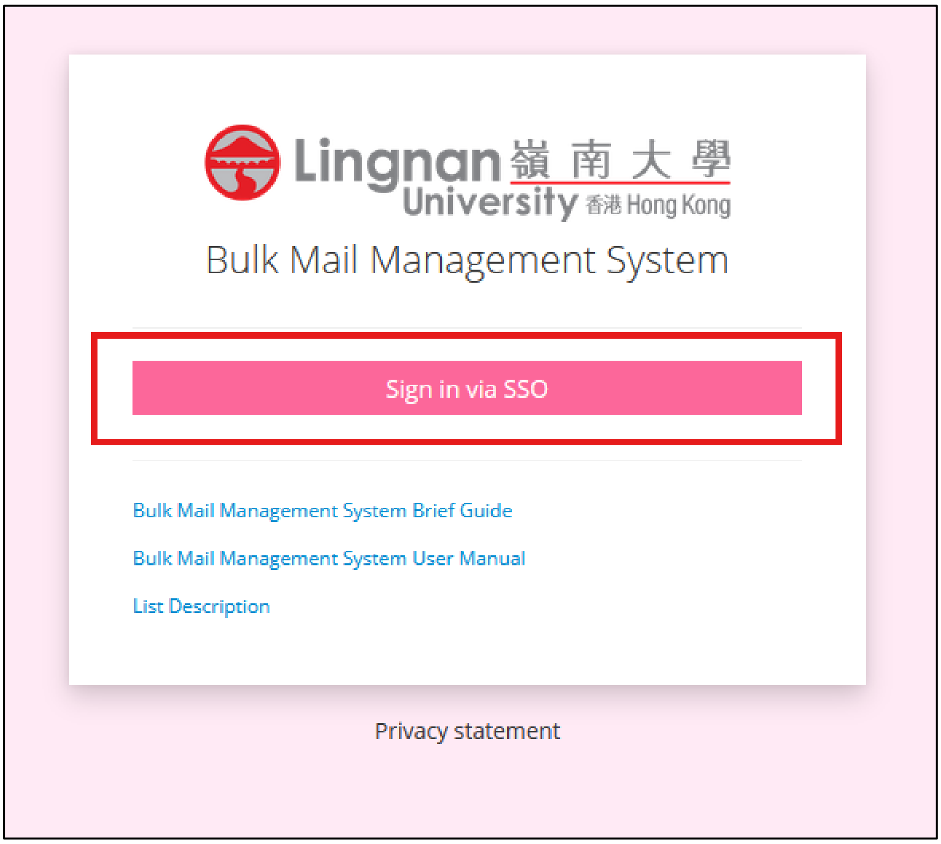

Image 1-1 Login screen

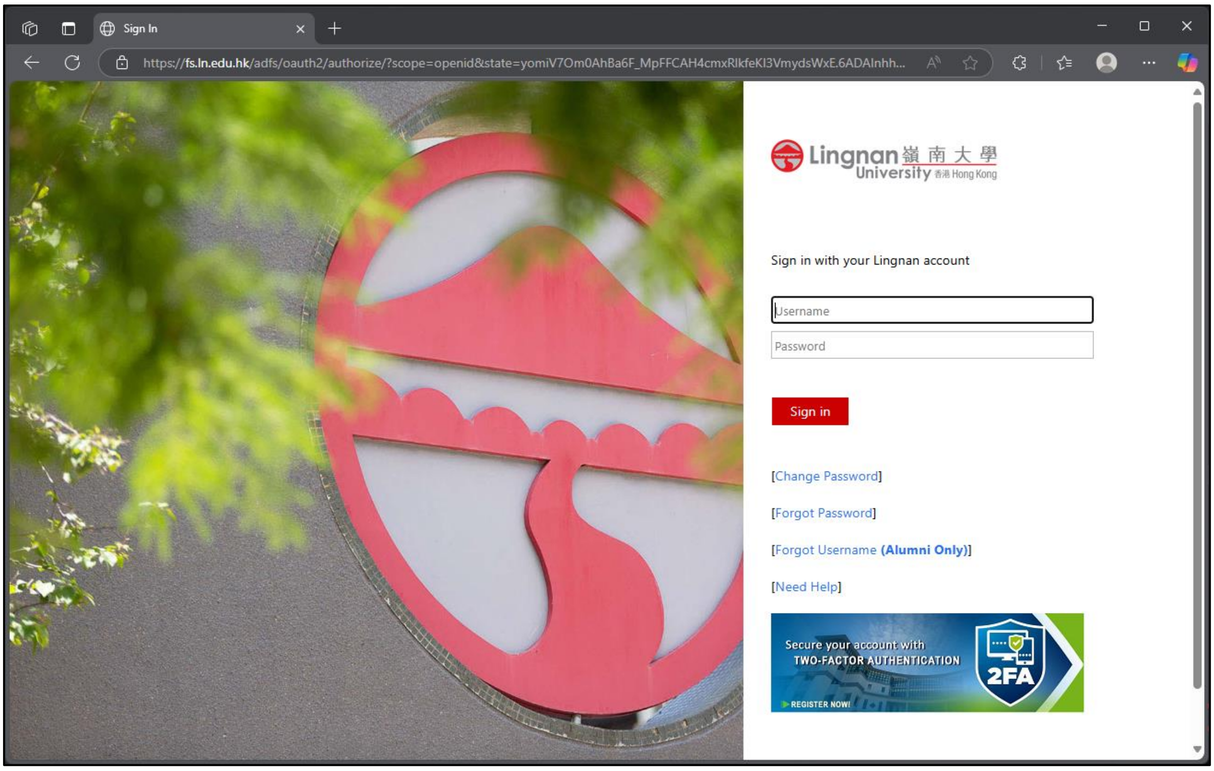

Image 1-2 Login by SSO

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 campaigns you can create in the bulk mail system, "Mandatory" and "Promotional".

- Mandatory Campaign
  This type of campaign will be delivered to all selected recipients. Recipients do not have the option to un-subscribe themselves from this kind of campaign.

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

[1] The bulk mail system supports most of the modern browsers, such as Chrome, Firefox or Edge.

2.1 Step 1 – Edit Delivery Information

1. Clicking the "Automation" at left hand side. Click “Campaigns” in the menu. (Image 2.1-1).

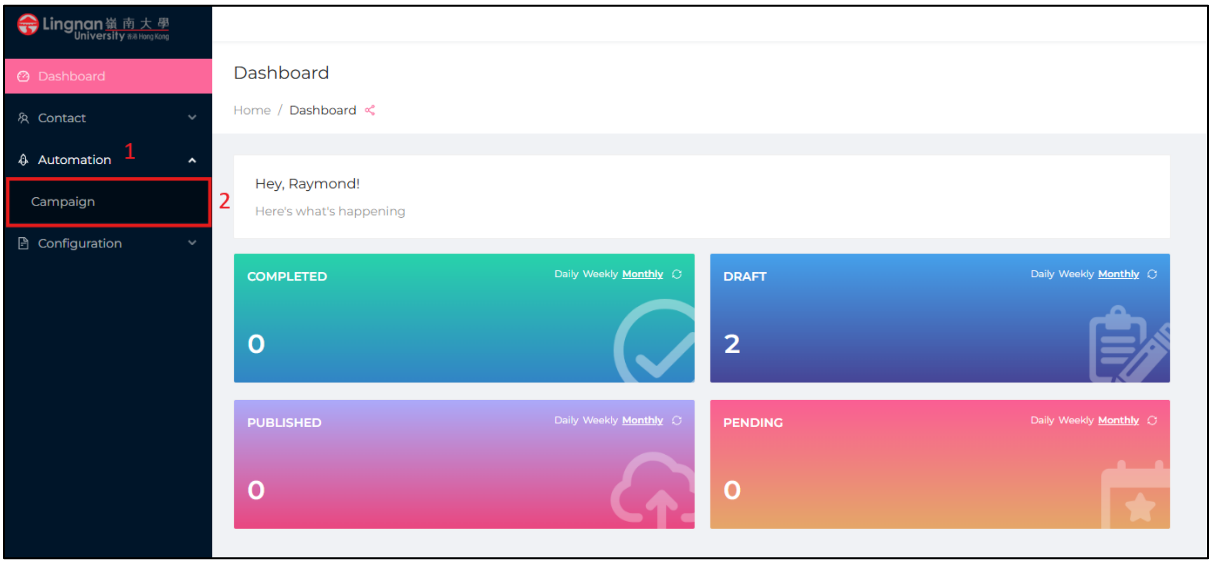

Image 2.1-1 The campaigns menu

2. Click the “Create” button at the right side (Image 2.1-2) or move your mouse to button and click “Duplicate” from an existing campaign (Image 2.1-3).

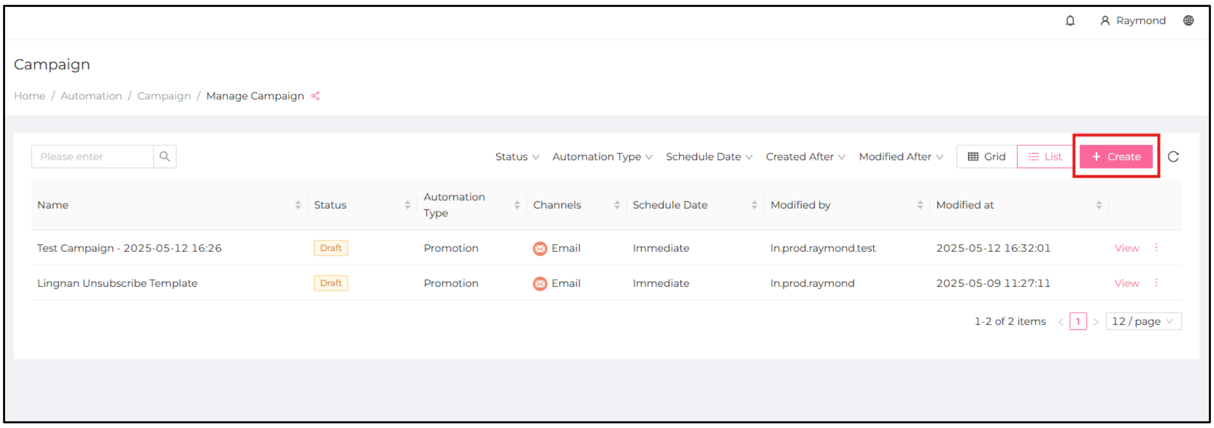

Image 2.1-2 Create campaign button

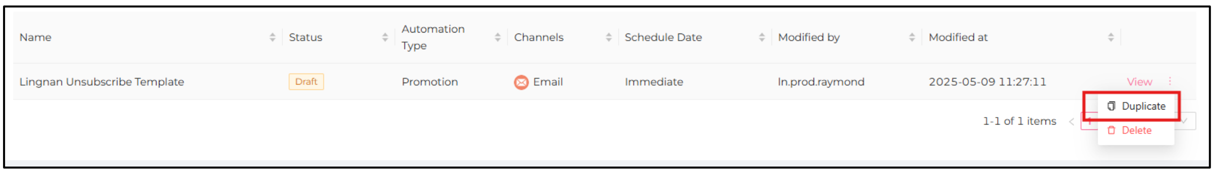

Image 2.1-3 Duplicate the unsubscribe template

3. Fill in necessary information in the “Create Campaign” page (Image 2.1-4).
    I. Campaign Name: A unique name which defines the campaign, not the SUBJECT of the email.
    II. Select “Promotional” or “Mandatory” in “Automation Type”
    III. Description: If you wish to add any remarks or additional details about the campaign, you can fill in the <Description> field. This description serves as a helpful reference and can provide context or specific instructions related to the campaign.

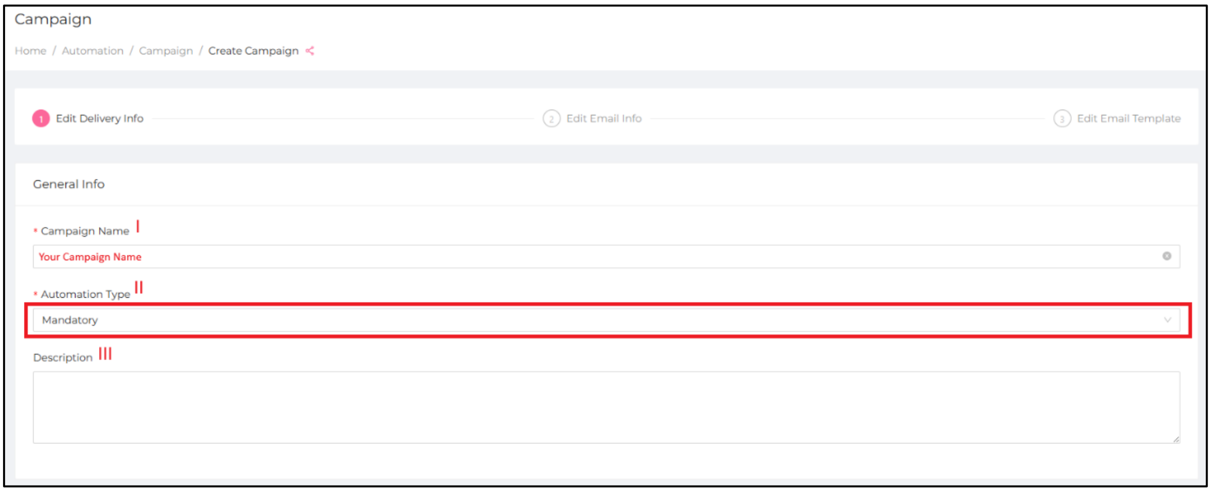

Image 2.1-4 Campaign Information

4. Select Schedule Type
    i. To send the campaign immediately once approved, select “Immediate”.
    ii. To send the campaign at a specific time once approved, select “Schedule” and choose the date and time at “Publishing time” (Image 2.1-5).

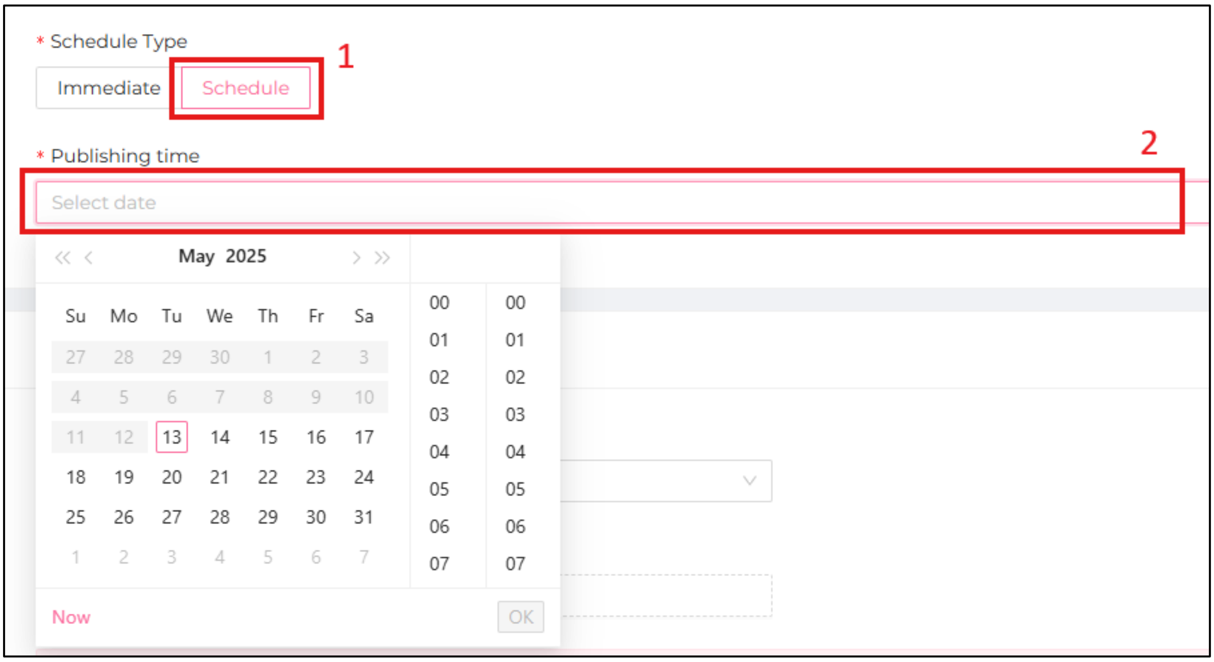

Image 2.1-5 Specify date and time to send the campaign

5. In the Recipients section, select the target recipient in "Contact List" (Image 2.1-6).

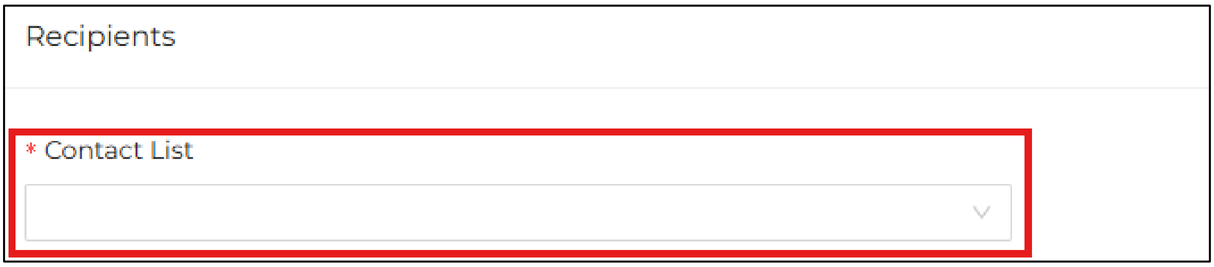

Image 2.1-6 Recipients – Select Contact List

6. Click "Add List" button to add other Contact Lists (Image 2.1-7)

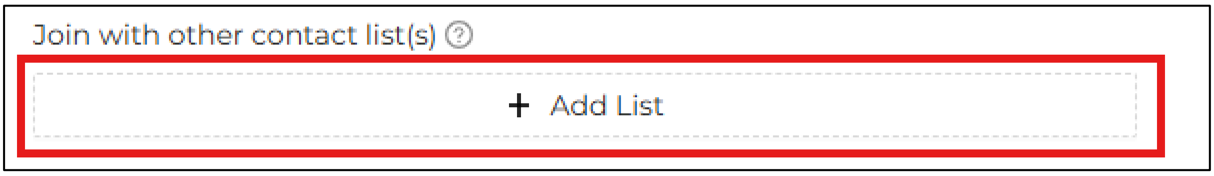

Image 2.1-7 Recipients – Add other Contact Lists

7. Select the required contact list (Image 2.1-8)

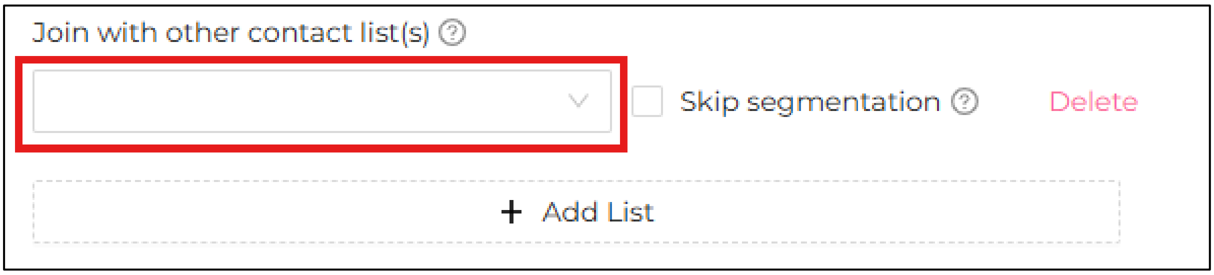

Image 2.1-8 Recipients – Select other contact list to join with

8. You may click “Fetch Preview Contacts” to view the total number of recipients in the selected contact list(s) (Image 2.1-9)

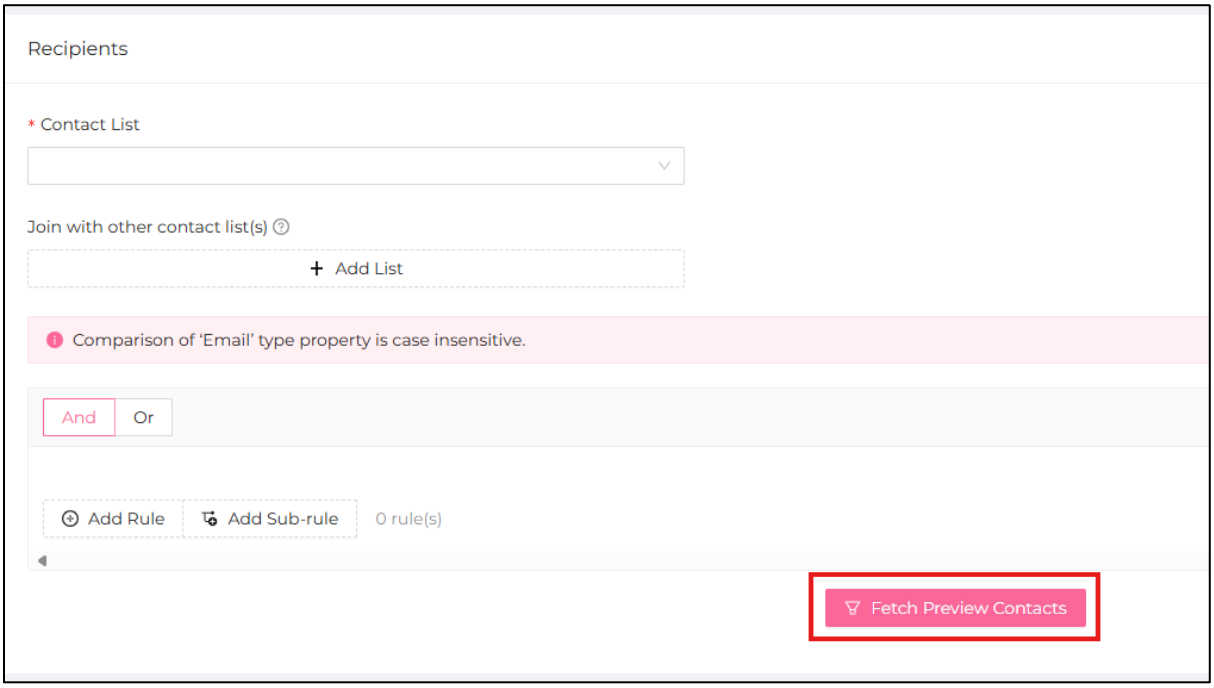

Image 2.1-9 Show total number of recipients in selected contact list(s)

9. Make sure the check box “Allow repeatedly sending” is not selected to avoid sending duplicate recipient email addresses after combination of different contact lists (Image 2.1-10).

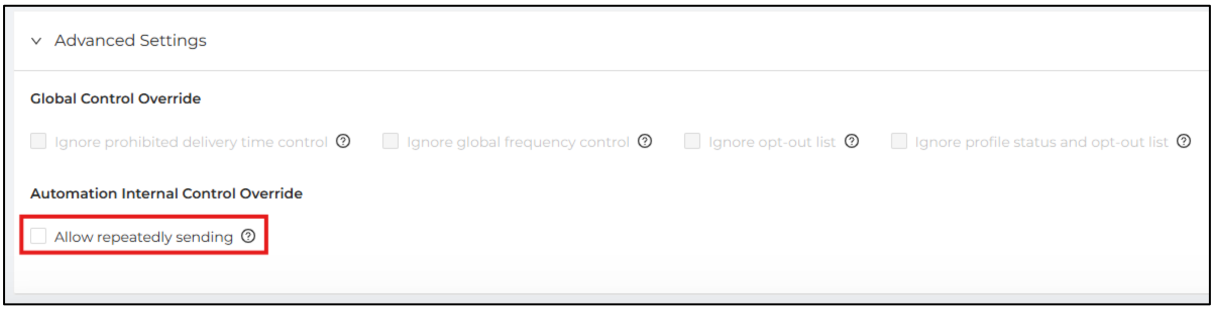

Image 2.1-10 Make sure the check box of “Allow repeatedly sending” is not selected

10. Click “Next” at lower right corner for editing email information (Image 2.1-11)

Image 2.1-11 Click “Next” for edit email information

2.2 Step 2 – Edit Email Information

1. Fill in the email subject for your email. Please provide the desired subject line that will be shown when customers receive the email (Image 2.2-1).

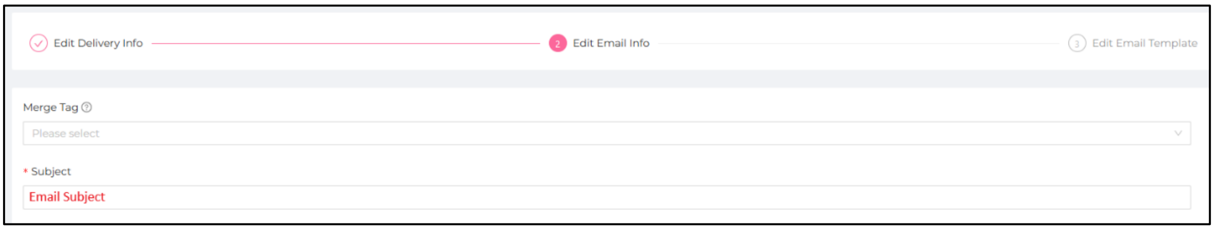

Image 2.2-1 Subject of the Email

2. Upload File: You can add attachment to the bulk mail by clicking “Upload File” button. The total size of attachment(s) per campaign cannot exceed TWO megabytes (2MB) and the total number of attachment(s) per campaign cannot exceed FIVE (Image 2.2-2).

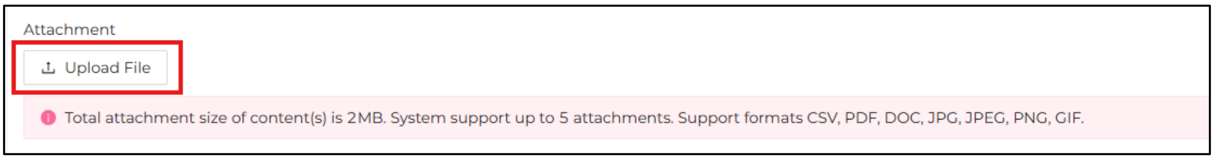

Image 2.2-2 Adding attachment to the bulk mail

3. Fill in the necessary information for Sender information (Image 2.2-3)
   I. From email: Sender email address (your departmental email address).
   II. From name: Display name of the sender email address (name of your department).

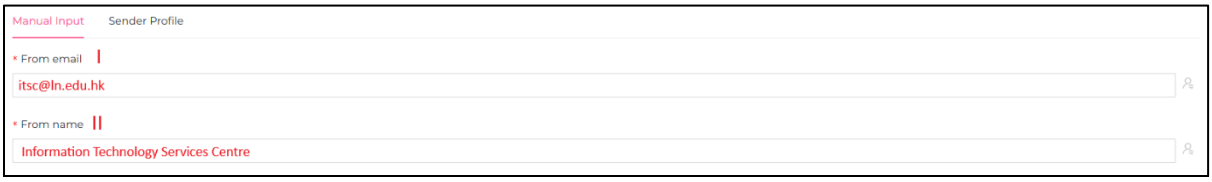

Image 2.2-3 Sender Information

4. Reply to information: If you want to receive the replied email with another email address, you can click “Add Reply To” button (Image 2.2-4).

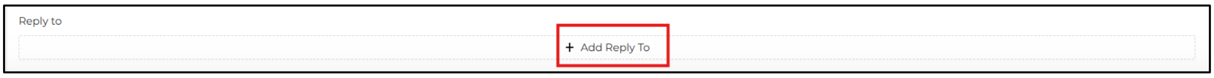

Image 2.2-4 Add Reply To information

5. Fill in the necessary information for the Reply to information (Image 2.2-5)
   I. Reply to email: Reply to email address.
   II. Reply to name: Display name of the reply to email address.
   III. Add Reply To: You can click “Add Reply To” to add multiple reply to email addresses

Image 2.2-5 Reply To information

6. Click “Next” at the lower right corner for editing email template (Image 2.2-6)

Image 2.2-6 Click “Next” for editing email template

2.3 Step 3 – Template

1. You can upload prepared HTML files as your campaign content
   - Click “Select” under “Upload zip file” (Image 2.3-1).

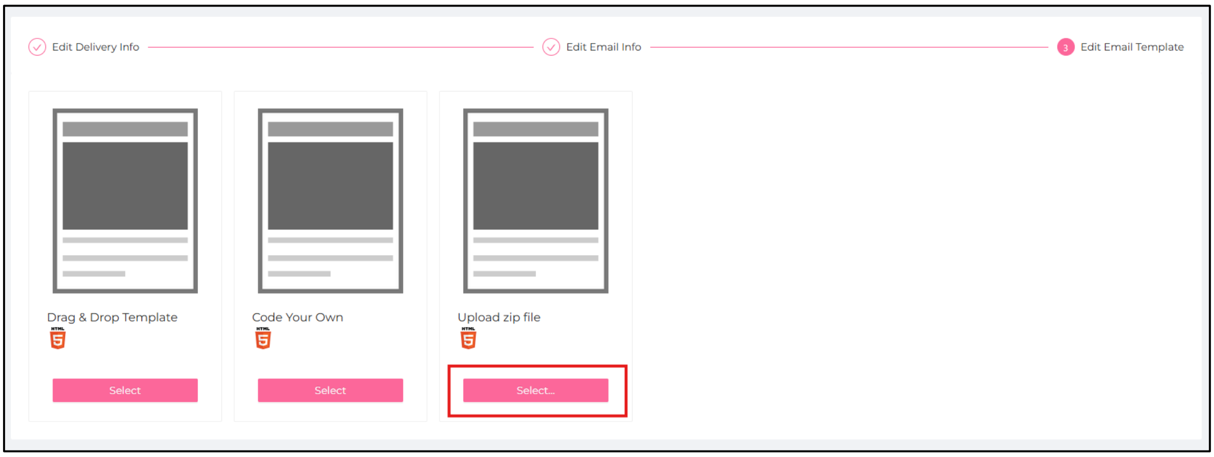

Image 2.3-1 “Upload zip file” as the content

- Click the button under “V1” to browse your computer for the file (Image 2.3-2)

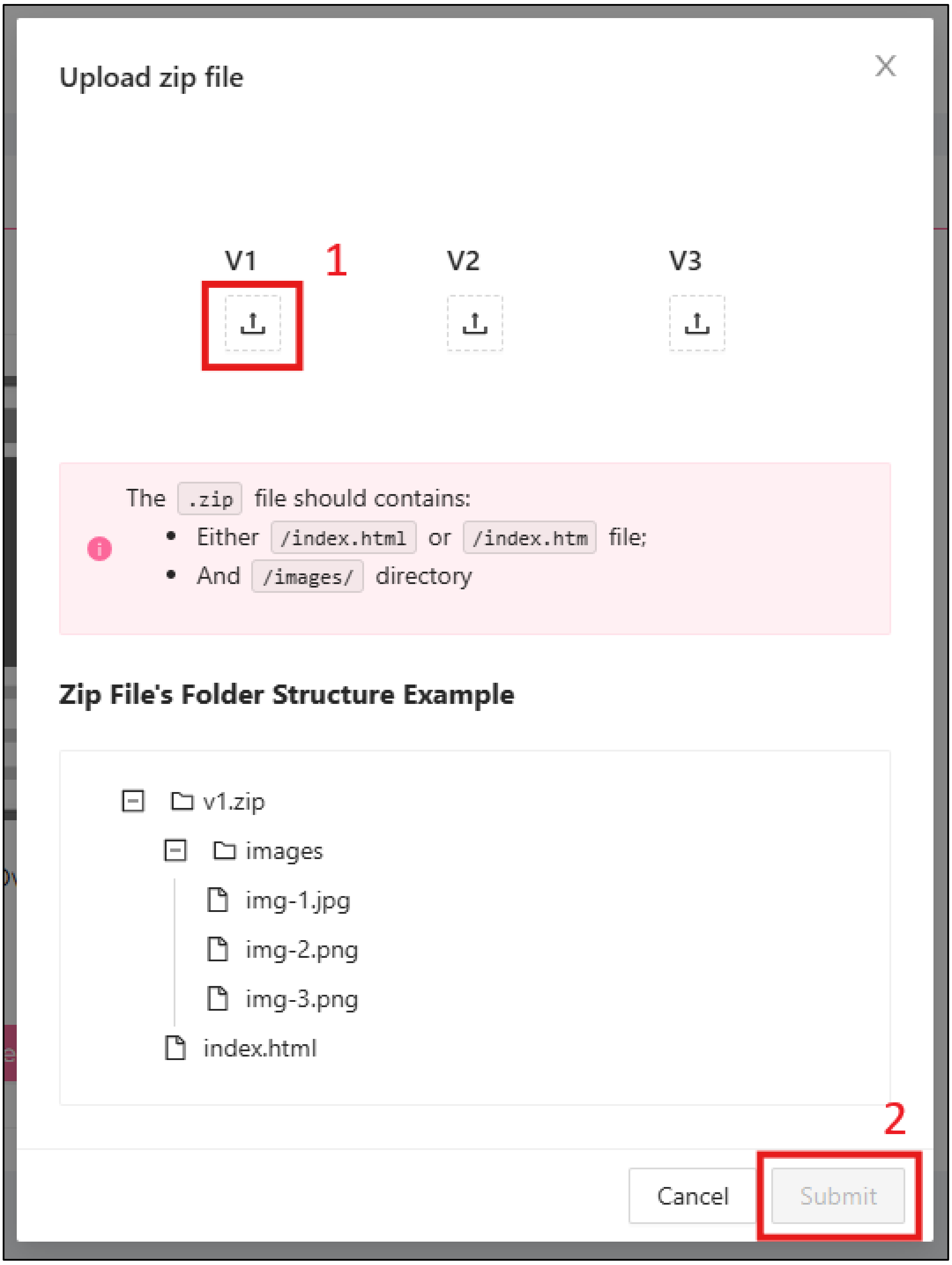

Image 2.3-2 Upload your prepared content

The uploaded zip file should contain a completed HTML file and the media files. The HTML file must be named as “index.html” and placed in the first layer of the zip file. The zip file must be named in English.

Alternatively, you can create your mail content manually by selecting "Code Your Own" (Image 2.3-3).

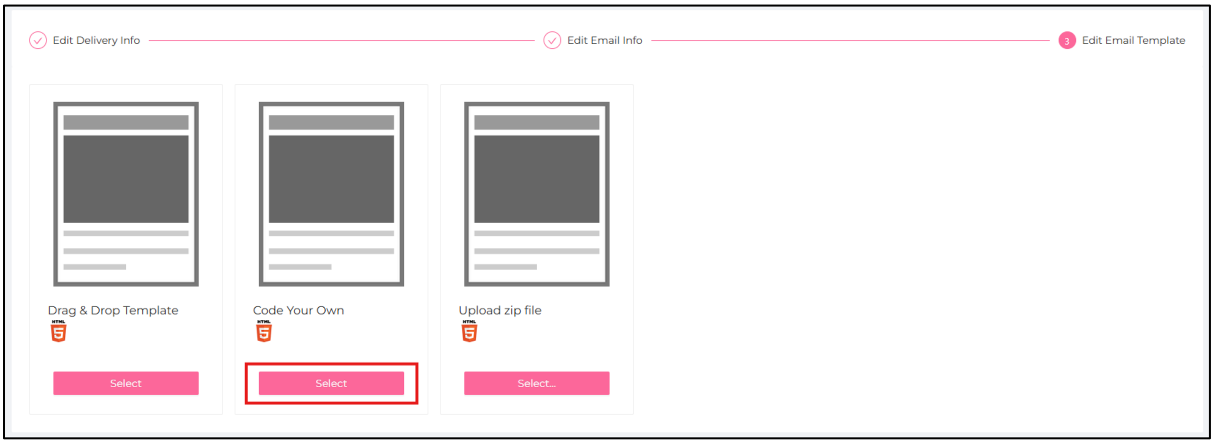

Image 2.3-3 Create content manually by "Code Your Own"

If the campaign is duplicated from an existing one, you can click "Select" under "Existing" to edit the original content (Image 2.3-4).

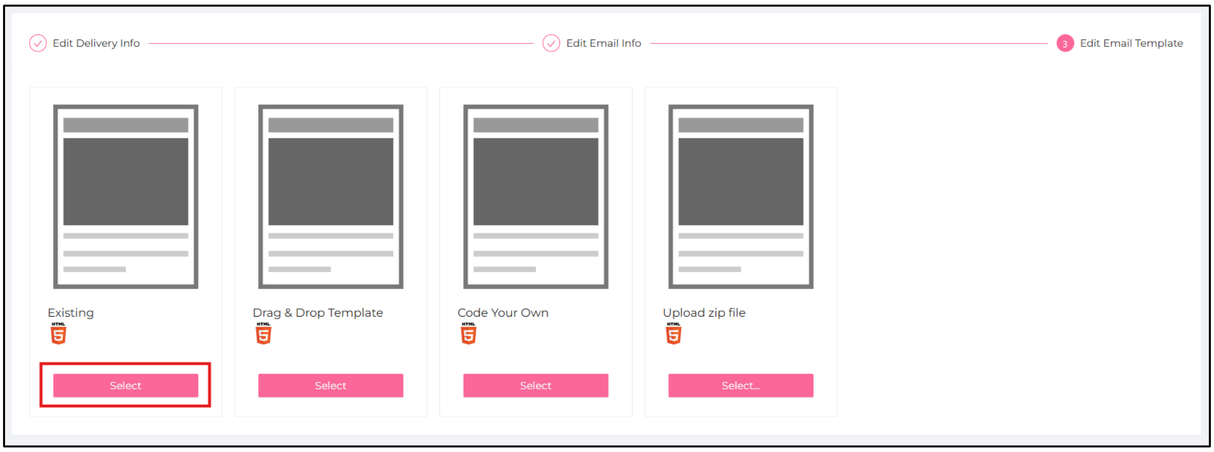

Image 2.3-4 Click "Select" under "Existing"

2.4 Step 4 – Design

1. You can click "Design View" to edit your mail content directly (Image 2.4-1).

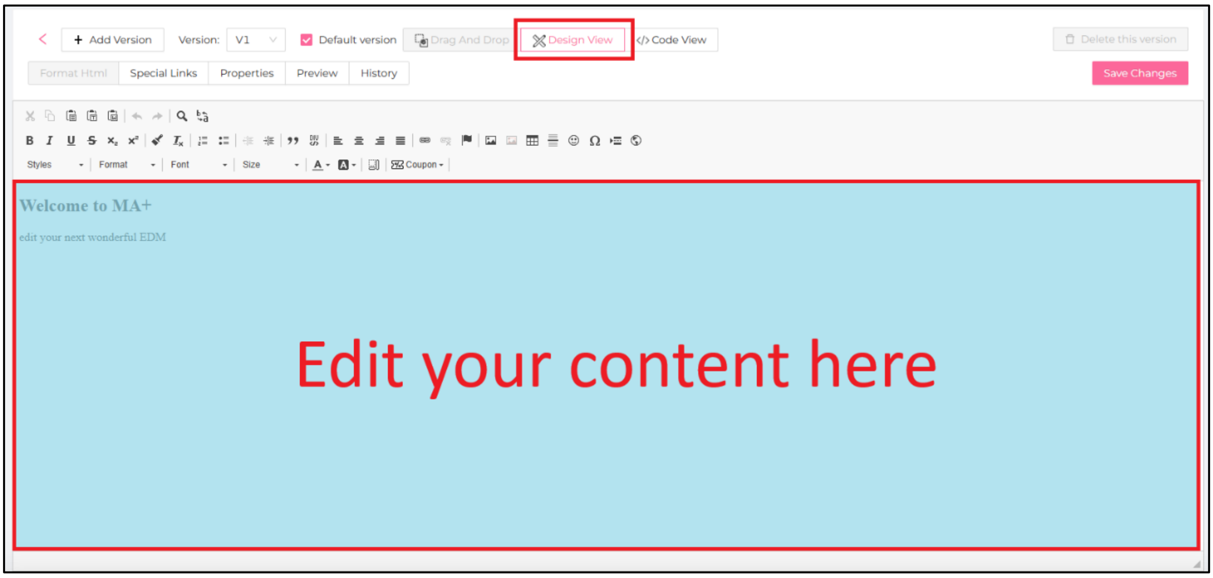

Image 2.4-1 The "Design View" of email content

2. You can preview how your email look and feel when viewed by desktop or mobile client
   - Click "Preview" (Image 2.4-2)

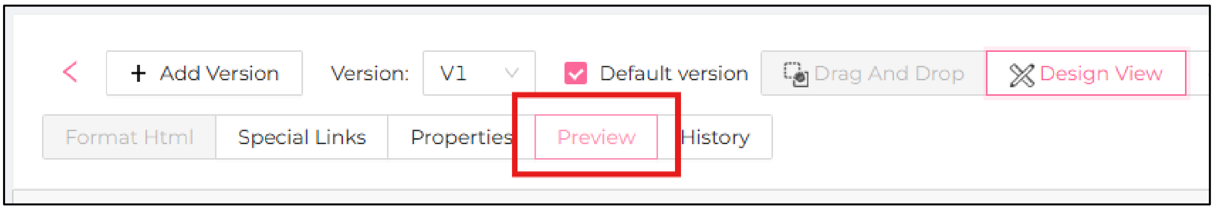

Image 2.4-2 Preview your email

   - A preview of your email will be displayed (Image 2.4-3).

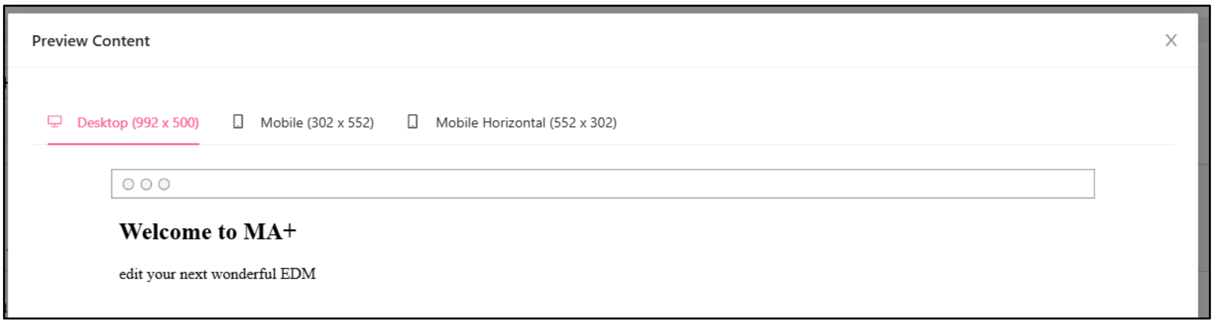

Image 2.4-3 Preview as desktop email client

   - To preview your email as a mobile email client, click "Mobile (302 x 552)" or "Mobile Horizontal (552x302)" (Image 2.4-4)

Image 2.4-4 Change to mobile view

3. Click “Save & Close” to save your email content (Image 2.4-5).

Image 2.4-5 Click “Save & Close” to save the email content

2.5 Step 5 – Preview

1. To send a sample email, click “Send sample” (Image 2.5-1).

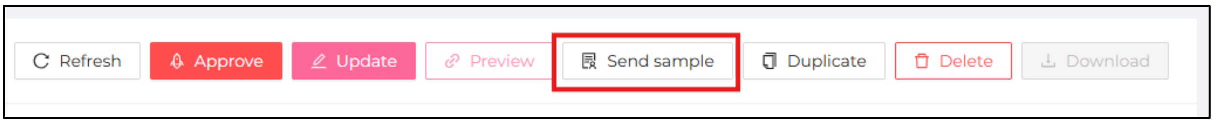

Image 2.5-1 Sending sample emails

2. Select Recipient(s) as Target Type, enter the recipient email address(s) in “Target Recipient(s)” and click “Send” button (Image 2.5-2).

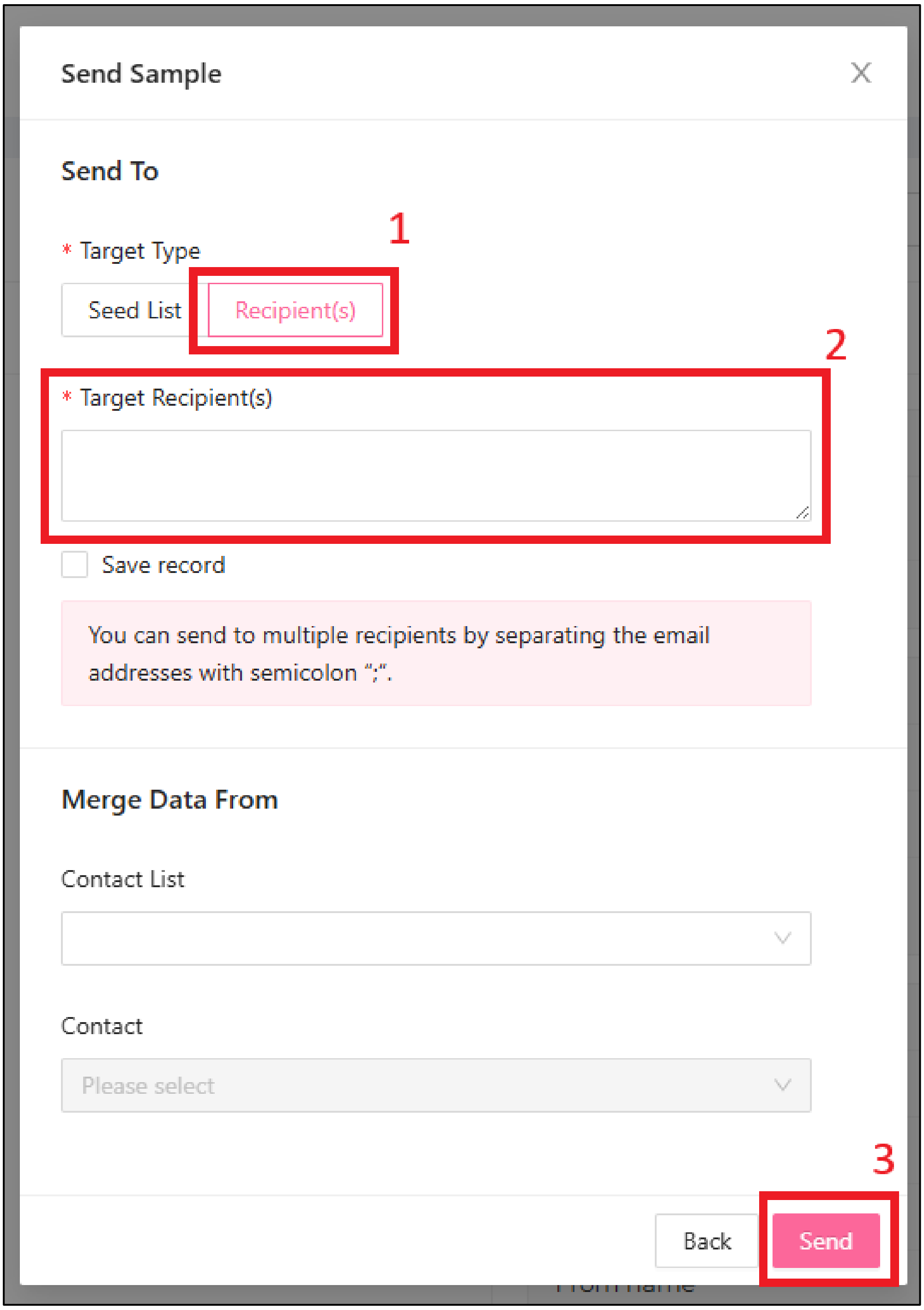

Image 2.5-2 Preview email recipient(s)

2.6 Step 6 – Confirm

1. Review the details of the campaign, click the "View" button to manage it (Image 2.6-1)

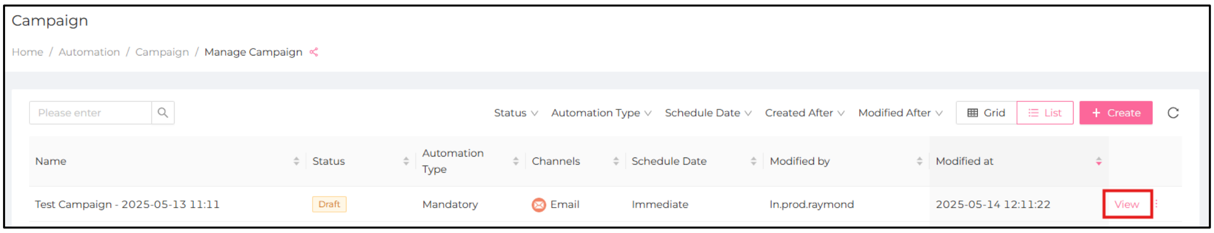

Image 2.6-1 View the campaign detail

2. Click "Update" button to update the content of the campaign (Image 2.6-2)

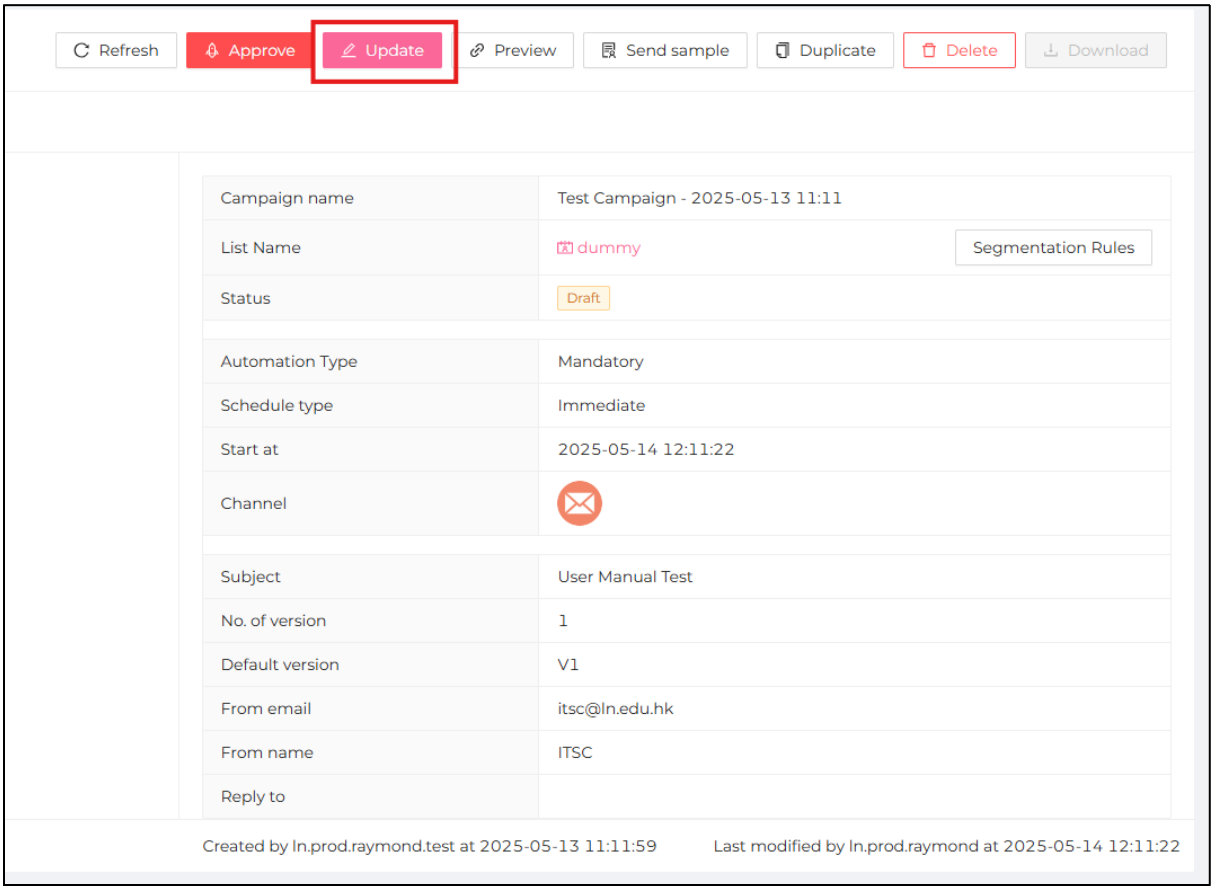

Image 2.6-2 Click "Update" to update the email content

3. If you do not have the right to approve a campaign, click "Request" button (Image 2.6-3) and click "Confirm" (Image 2.6-4)

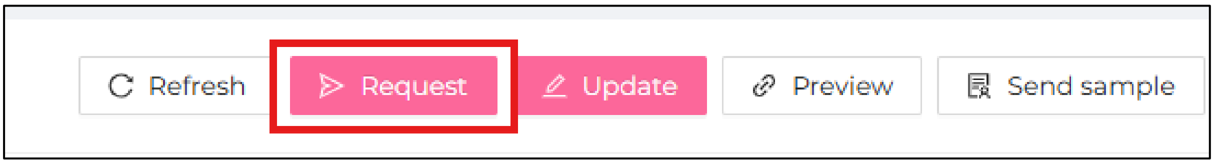

Image 2.6-3 Request for approval

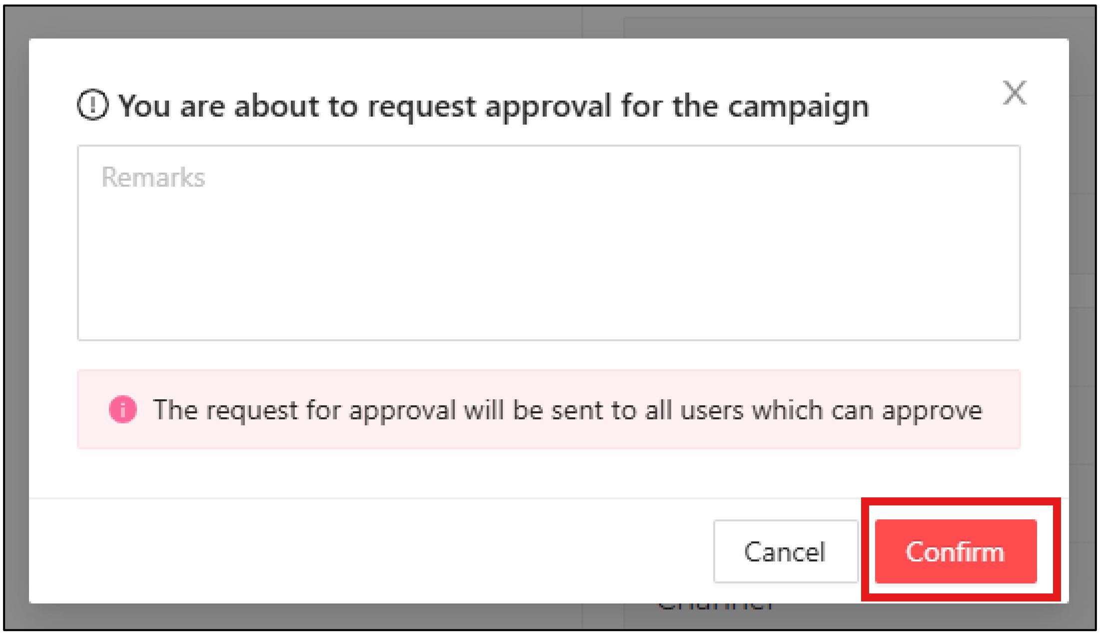

Image 2.6-4 Confirm to send out approval request to all approvers

4. If you have the right to approve a campaign, click “Approve” (Image 2.6-5). You will be asked to confirm the delivery of your campaign. Select “Confirm” to confirm or “Cancel” to go back (Image 2.6-6).

Image 2.6-5 Click “Approve” to send a campaign

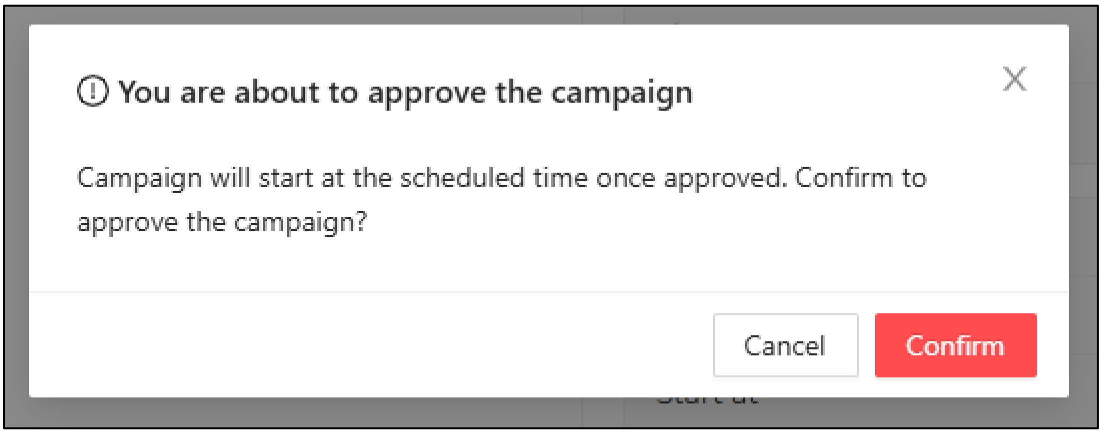

Image 2.6-6 Confirmation of campaign delivery

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

3 More about Campaign

3.1 Campaign Management

1. Clicking the "Automation" at left hand side. Click “Campaigns” in the menu. (Image 3.1-1).

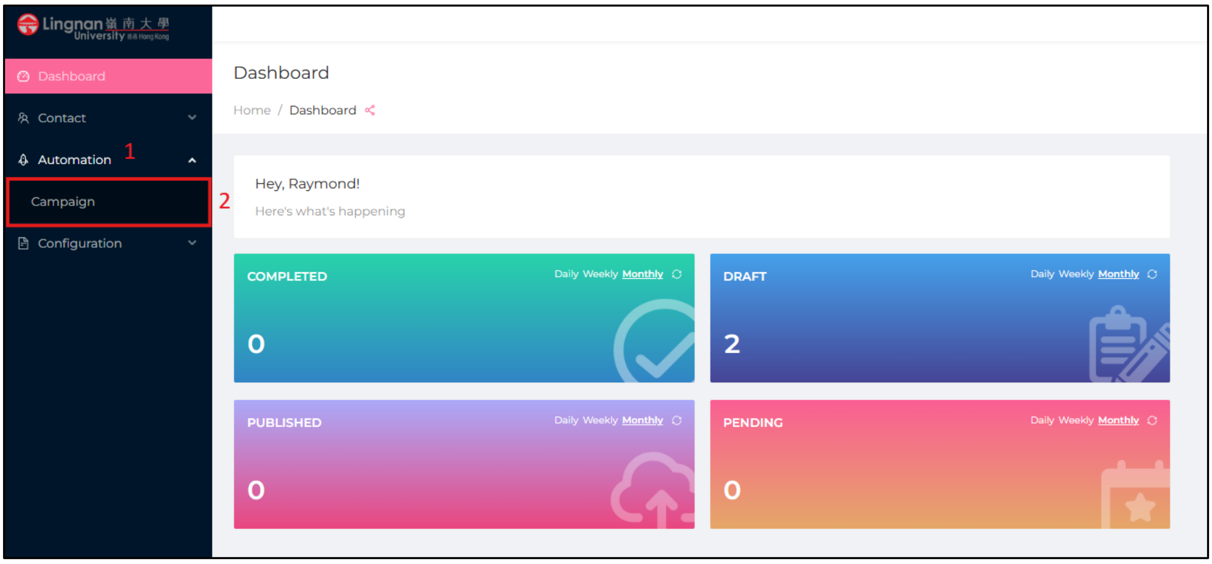

Image 3.1-1 The campaigns menu

2. A list of campaigns will be listed (Image 3.1-2)

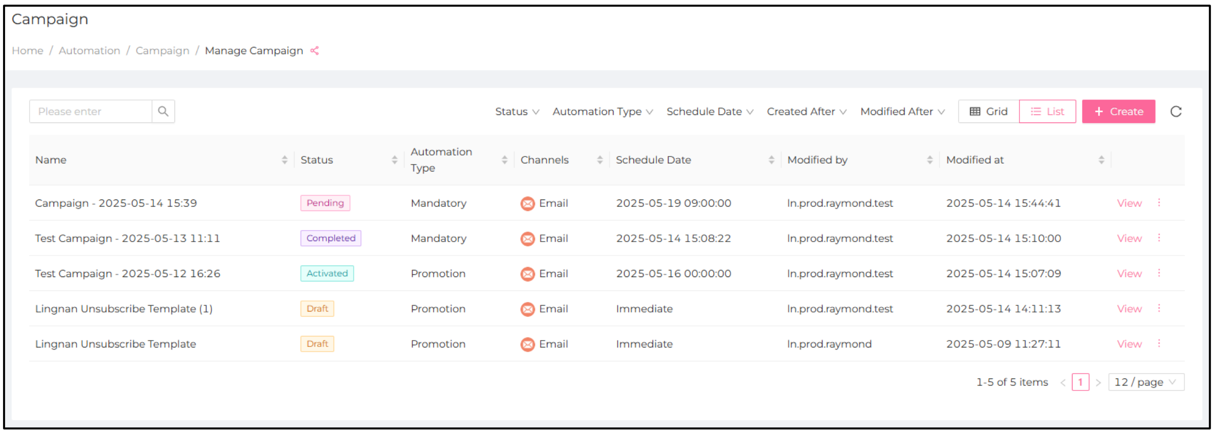

Image 3.1-2 List of campaigns

3. Click “View” to view the detail of the campaign (Image 3.1-3)

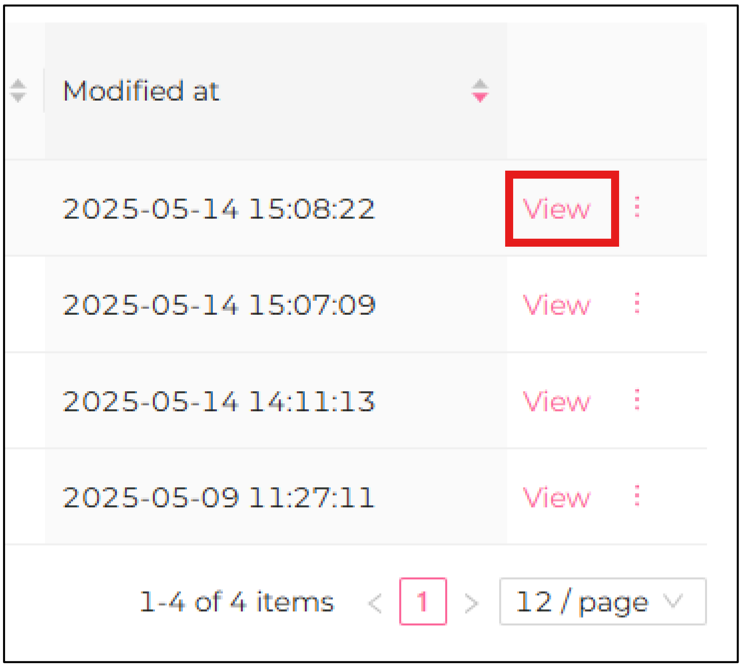

Image 3.1-3 View the campaign details

4. If the status of a campaign is "Draft" or "Pending", you can edit or duplicate it (Image 3.1-4)

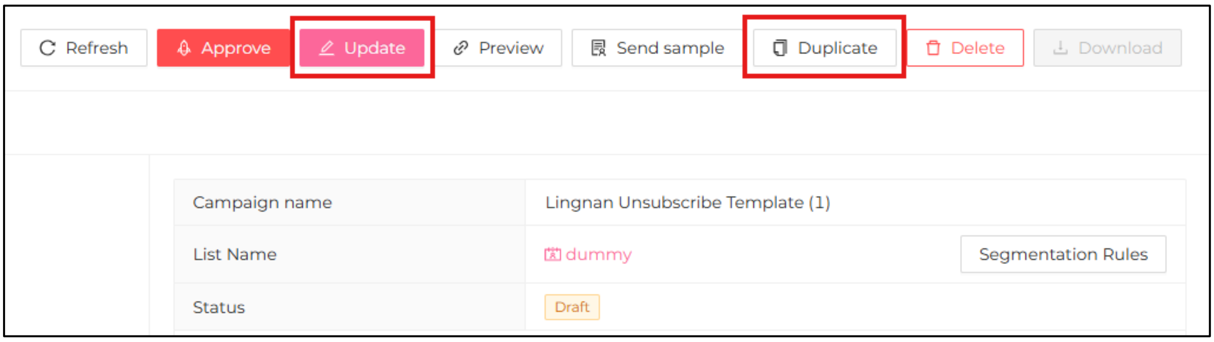

Image 3.1-4 Update the campaign or duplicate the campaign as a new one

5. You can "Stop" a scheduled campaign which marked as "Activated" (Image 3.1-5)

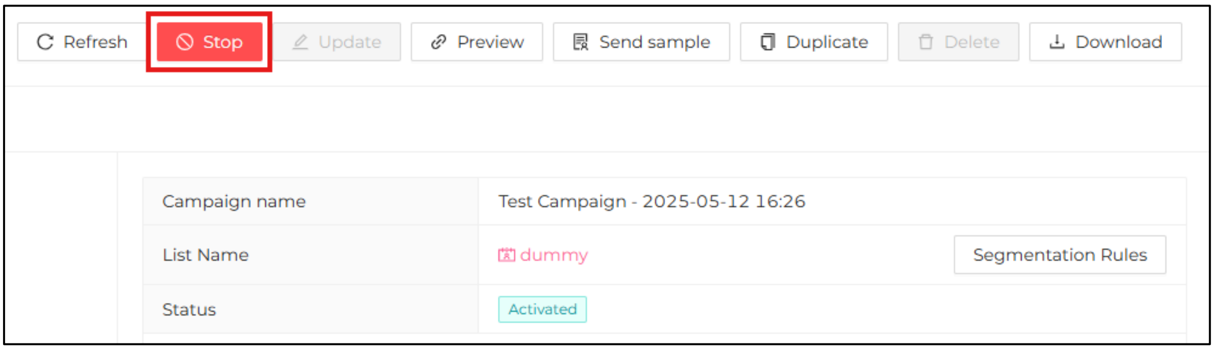

Image 3.1-5 About a scheduled campaign

6. Analytics Report will be available when the status of a campaign is “Completed” (Image 3.1-6).

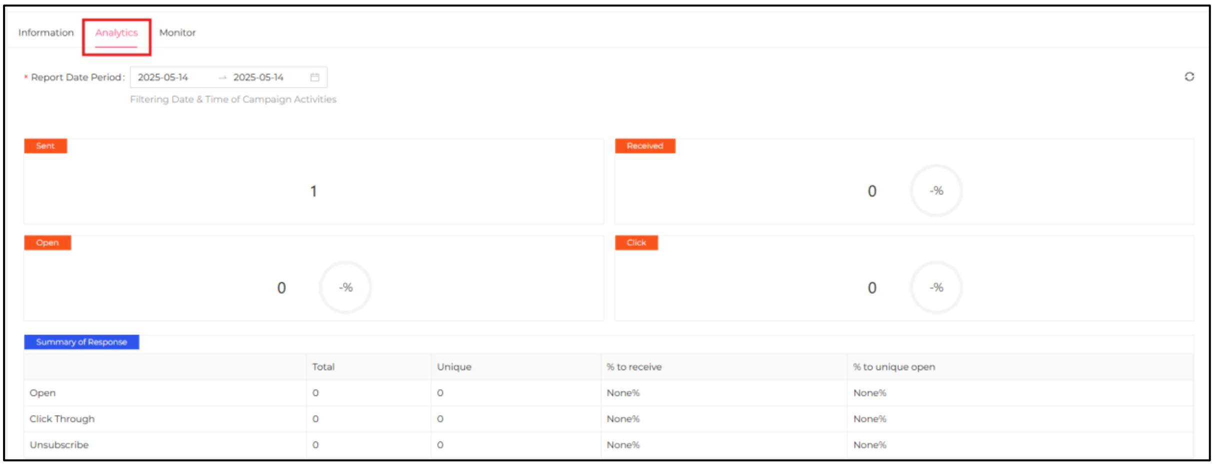

Image 3.1-6 Campaign statistics

The status of the campaign will be changed according to the users' actions (Image 3.1-7).

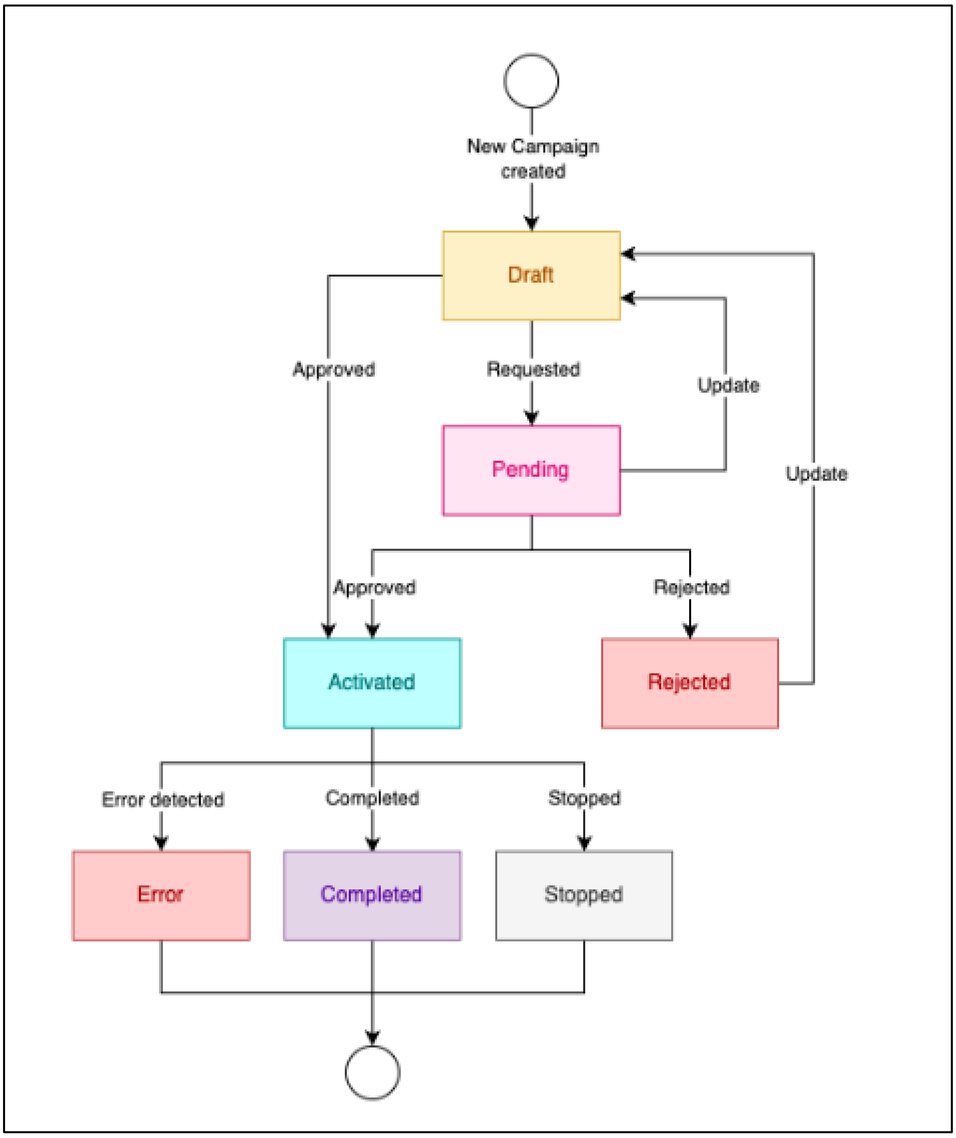

Image 3.1-7 Campaign status

3.2 Campaign Approval

1. To approve a campaign, login with a user with the approval rights.
2. Clicking the "Automation" at left hand side. Click “Campaigns” in the menu. (Image 3.2-1).

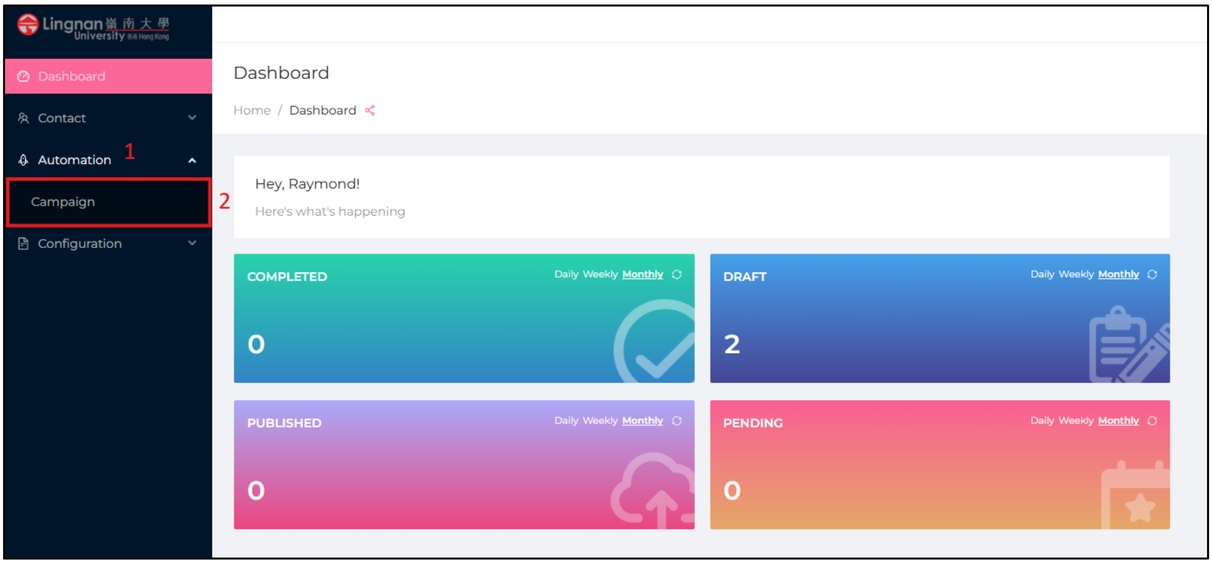

Image 3.2-1 The campaigns menu

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

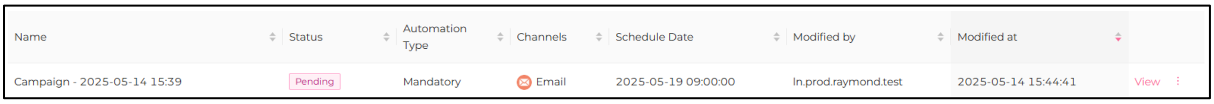

Image 3.2-2 Campaign pending for action

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

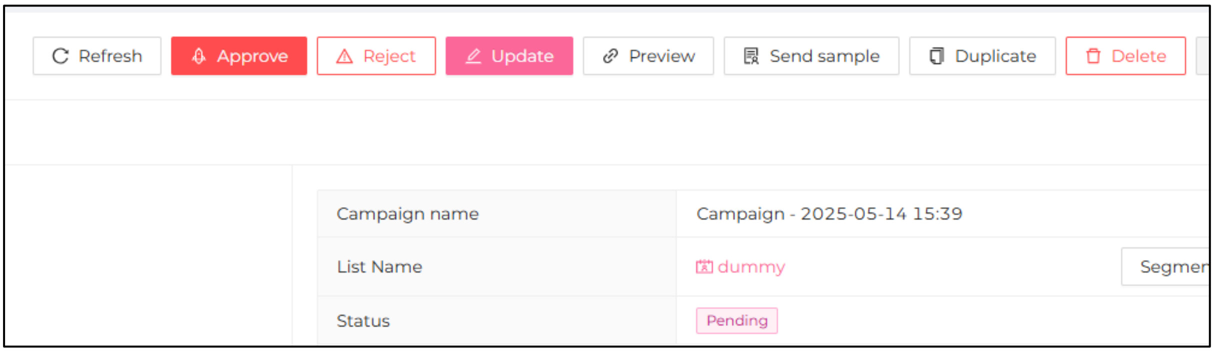

Image 3.2-3 Approver's actions

- Click "Approve" to approve the campaign, the campaign will be sent by the date and time set
- Click "Reject" to reject the campaign.
- Click "Update" to edit the campaign.
- Click "Preview" to view the campaign.
- Click "Send sample" to send an email sample to specific recipient(s).

- Click “Duplicate” to duplicate the campaign.
- Click “Delete” to delete the campaign.

4 Customizing your campaign

4.1 Working with Contact Lists

4.1.1 View the Contact Lists

1. Clicking the "Contact" at left hand side. Click “Contact List” in the menu. (Image 4.1.1-1).

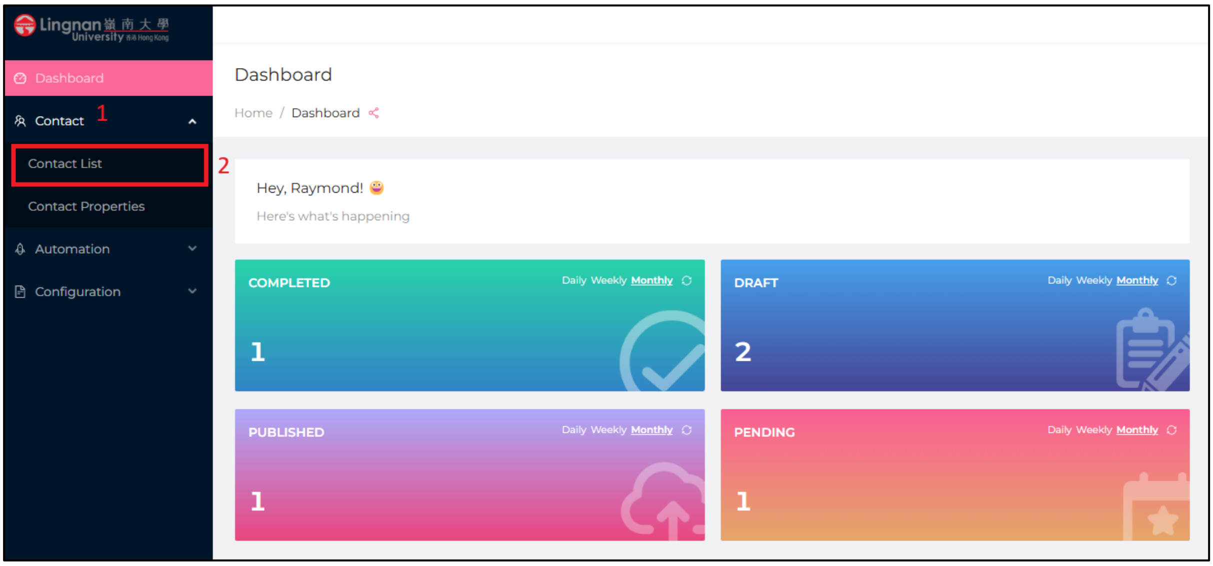

Image 4.1.1-1 View the contact lists

2. Existing lists are shown. To explore the list(s) created by request, click “Contact List” (Image 4.1.1-2). To explore the system generated list(s), click “Share Contact List” (Image 4.1.1-3).

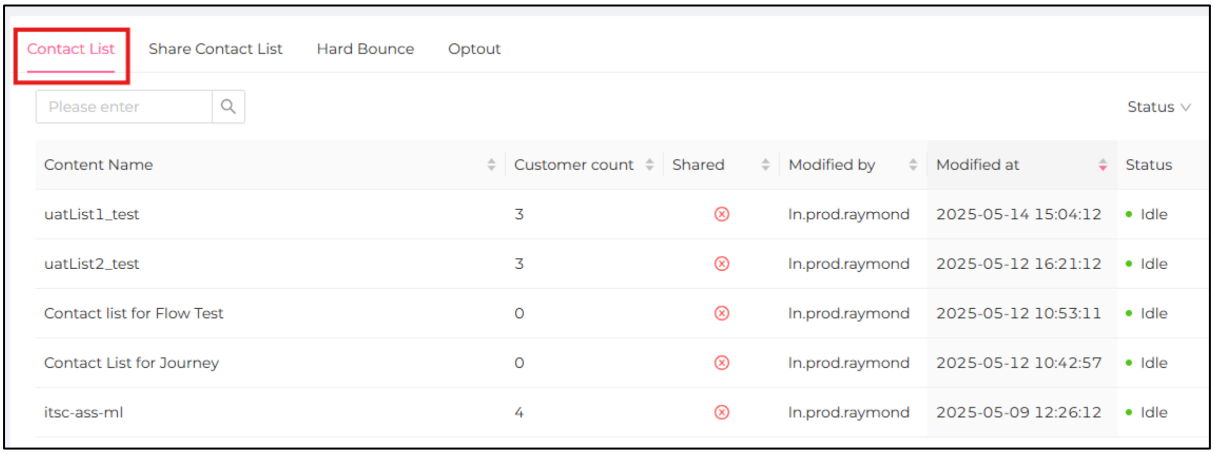

Image 4.1.1-2 View the contact lists

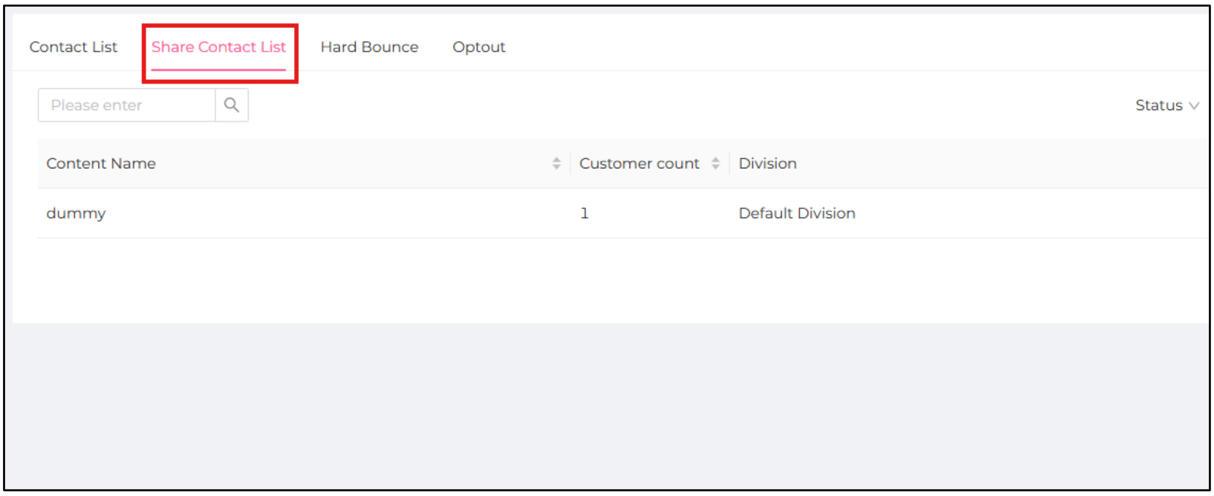

Image 4.1.1-3 View the share contact lists

4.1.2 Segment

“Segment” is a function for users to select only portion of the list. While creating a bulk mail campaign in [“Step 1 – Edit Delivery Information”](), contact lists 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 list “lnstudents” (Image 4.1.2-1).

Image 4.1.2-1 Select the contact list

2. Click “Add Rule” and select "If the contact’s property matches” (Image 4.1.2-2). Change the condition to [STUDENT_TYPE Equal “Fourth Year”]

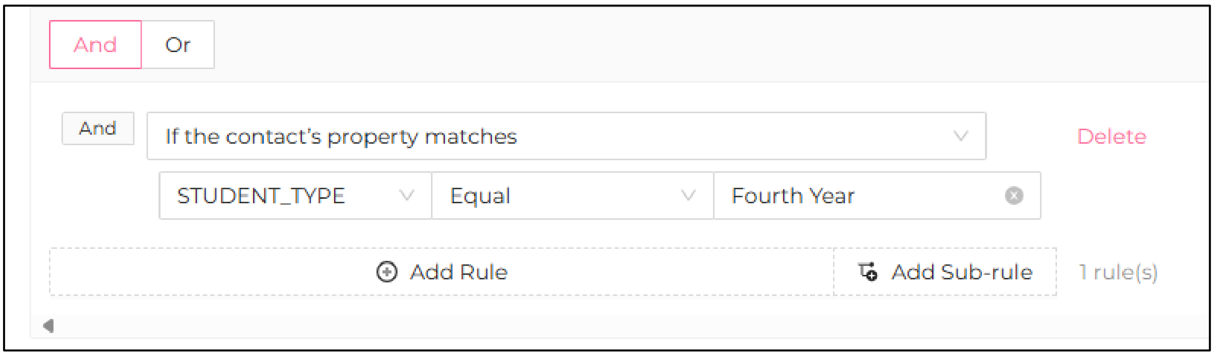

Image 4.1.2-2 Creating rules

You can add more conditions to create a more precise group of recipients by clicking “Add Rule” or “Add Sub-rule”.

4.2 Working with Contents

4.2.1 Adding Images

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

Image 4.2.1-1 The image icon

2. Click the "upload" button (Image 4.2.1-2), drag and drop your image file into the highlighted area (Image 4.2.1-3).

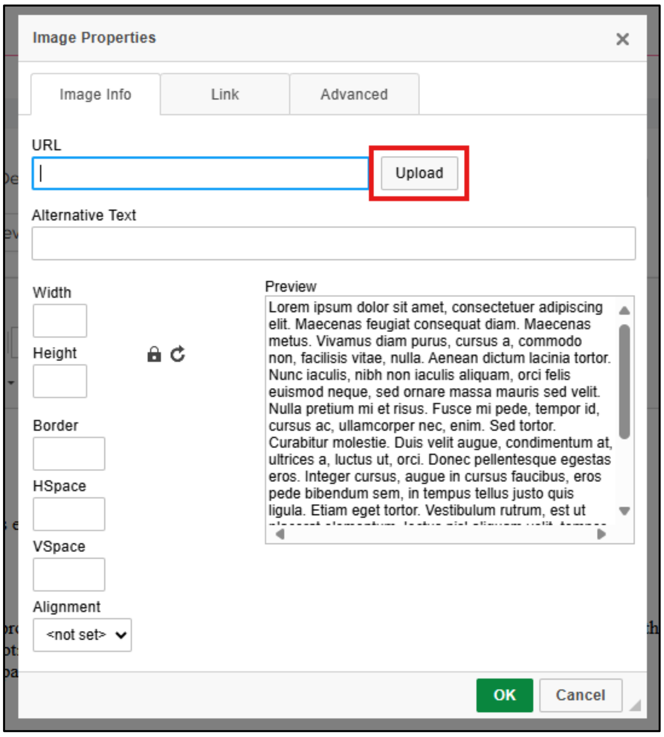

Image 4.2.1-2 Upload the image file to the bulk mail content

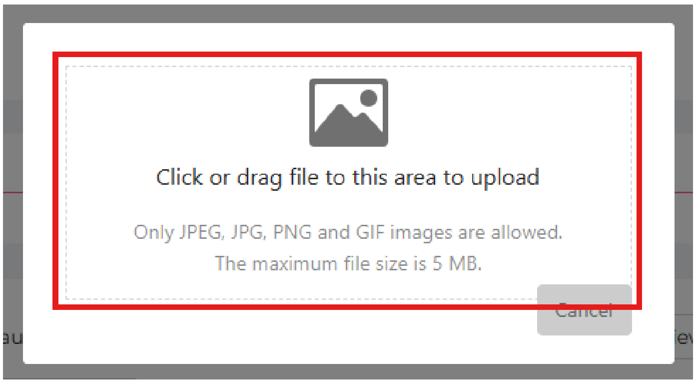

Image 4.2.1-3 Upload the image file to the bulk mail content

3. The image should be inserted into the email content (Image 4.2.1-4).

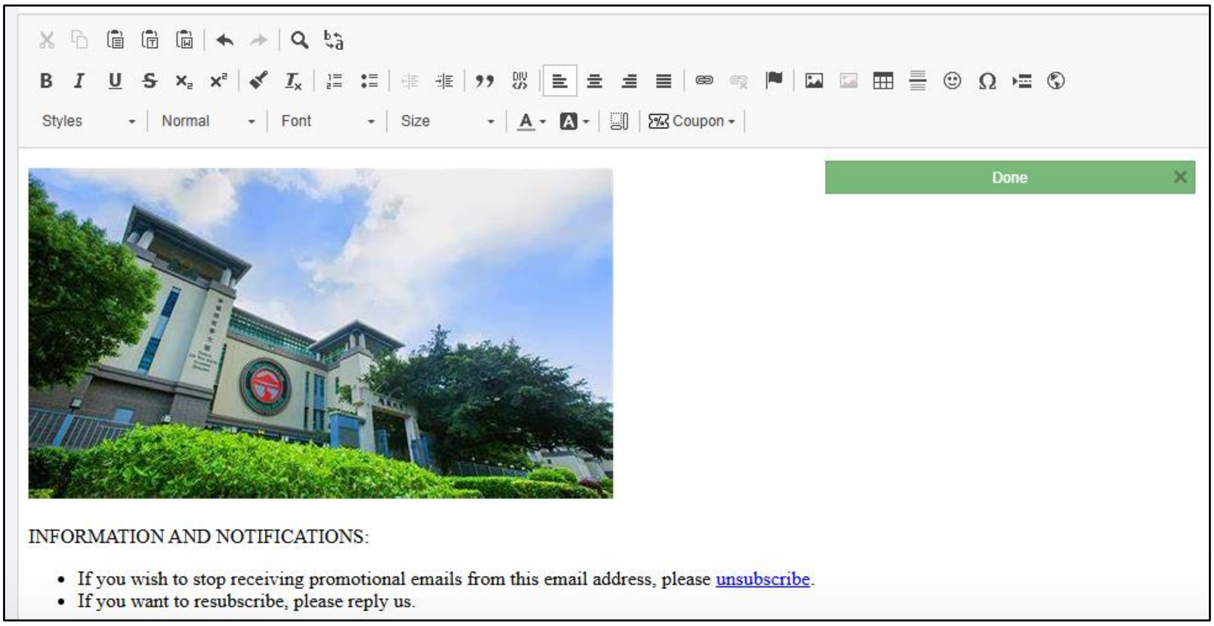

Image 4.2.1-4 Email content with image inserted

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

4.2.2 Creating Web Links

1. Highlight the text that you want to insert the web link (Image 4.2.2-5).

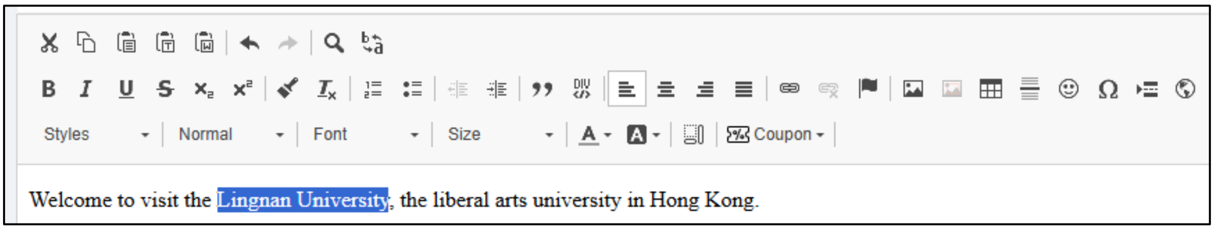

Image 4.2.2-5 Highlight the text that you want to apply link

2. Click the link icon on the editor bar (Image 5.2.2-6).

Image 4.2.2-6 The link icon

3. Enter the URL address and click "OK" button (Image 4.2.2-7).

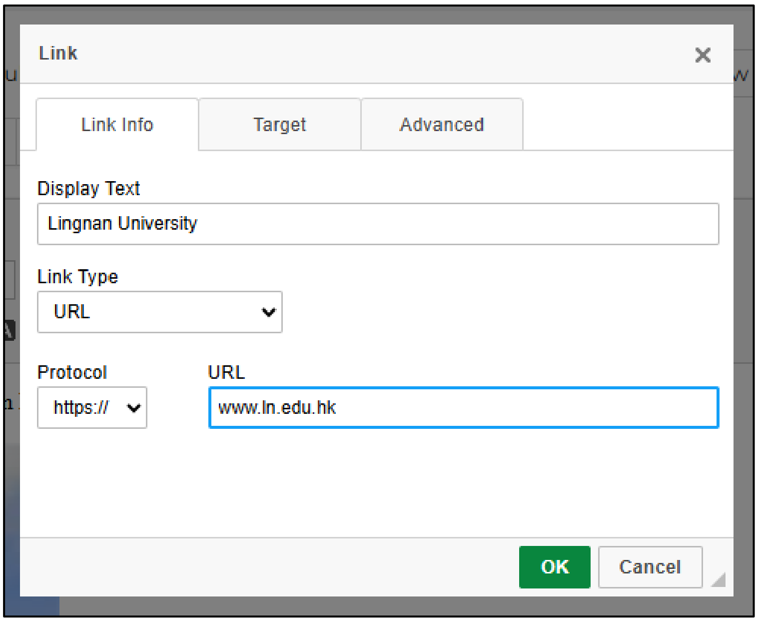

Image 4.2.2-7 Configure the text link

5 Manual Creation of Un-subscription Link

Apart from copying the duplicating the "Lingnan Unsubscribe Template" as stated in Step 1 of Chapter 2, you can also create the un-subscription link manually.

5.1 Campaign without using Built-in Template

1. For the campaign created without using built-in template, first access the design view of your message (Image 5.1-1).

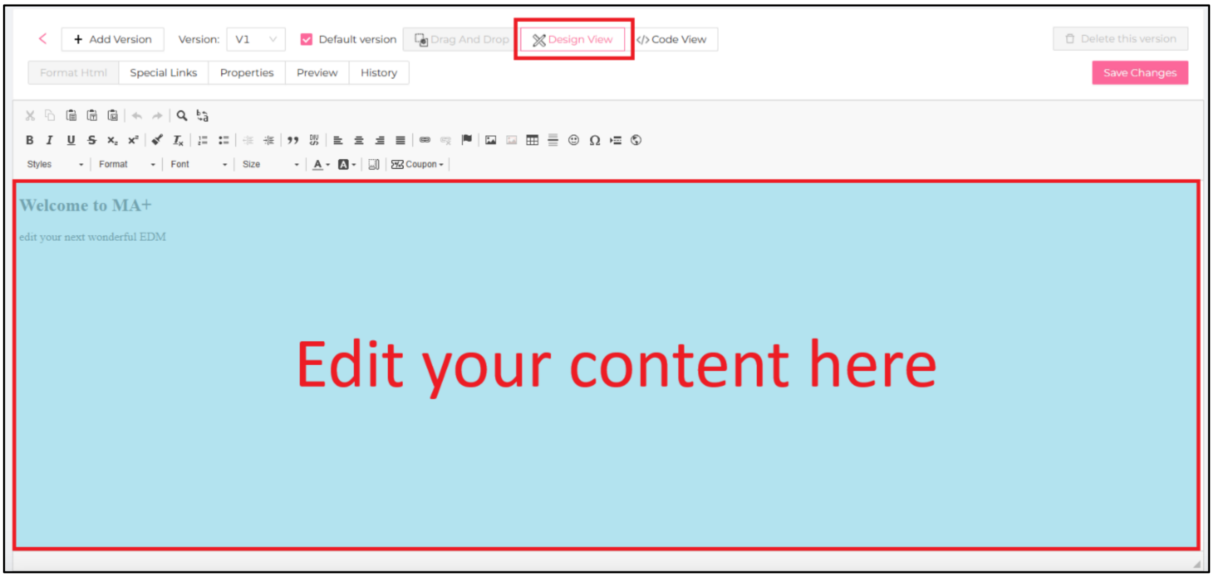

Image 5.1-1 Design View

2. 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.

3. Select the word "unsubscribe" in the paragraph (Image 5.1-2).

Image 5.1-2 Select the word "unsubscribe"

4. Click the "Special Links" button (Image 5.1-3) and select "Unsubscribe" (Image 5.1-4).

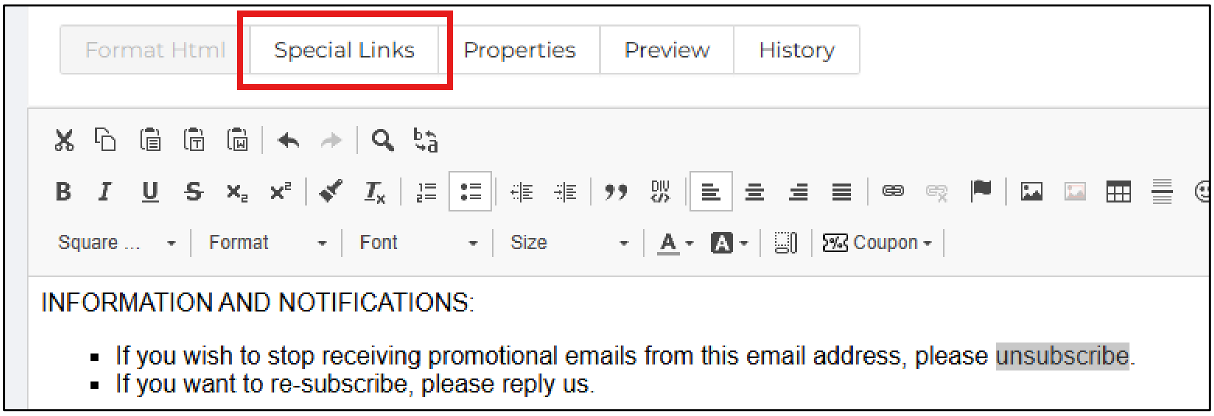

Image 5.1-3 Click the "Special Links"

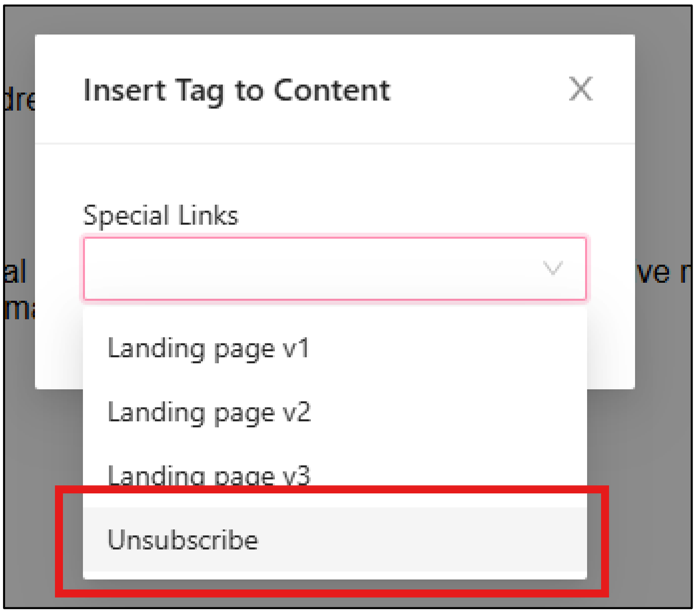

Image 5.1-4 Select "Unsubscribe"

5. The selected text will change to an un-subscription link (Image 5.1-5).

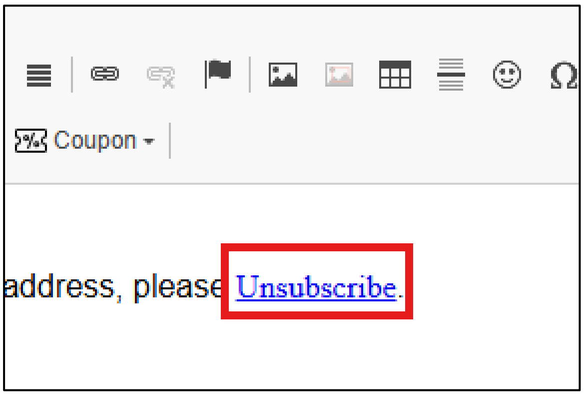

Image 5.1-5 Un-subscription link

5.2 Campaign using Built-in Template

When using a built-in template to create your campaign (Image 5.2-1) you are required to append the un-subscription information to your campaign manually.

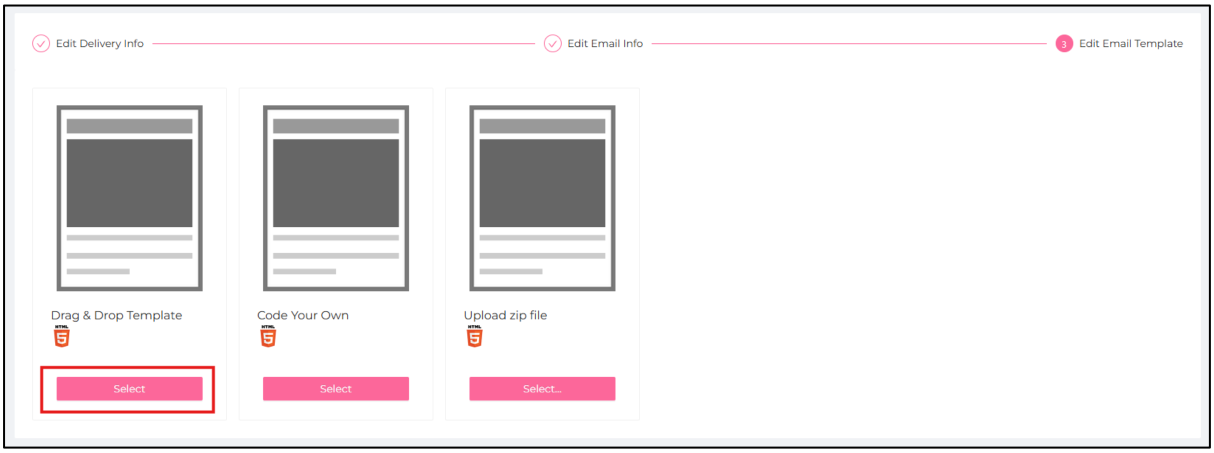

Image 5.2-1 Select the Drag & Drop Template

1. In the message contents, select and delete the content in one of the content boxes (Image 5.2-2).

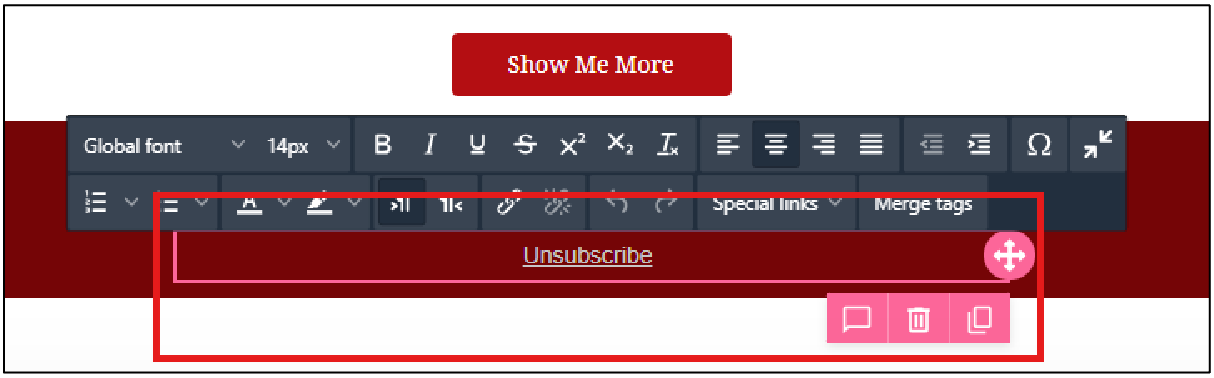

Image 5.2-2 Delete the content from the content box

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 5.2-3).

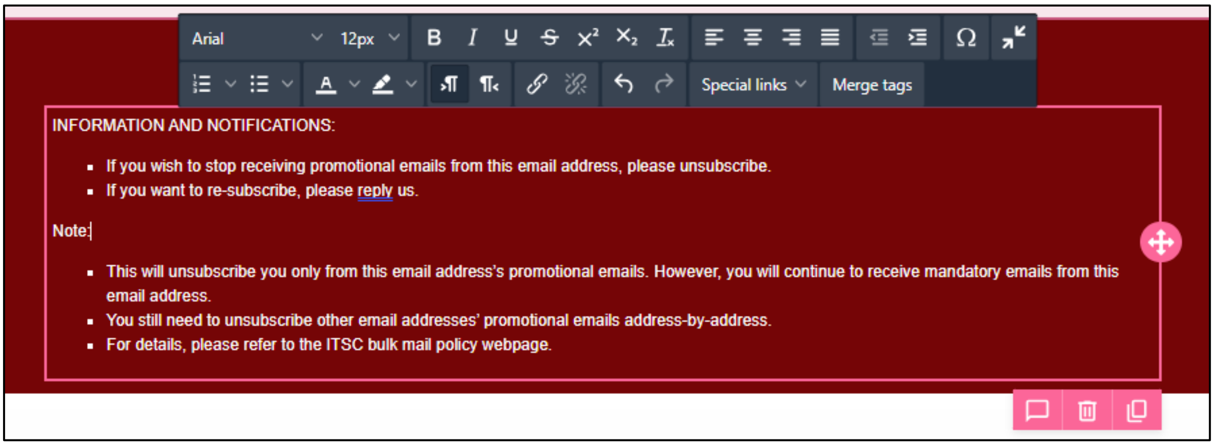

Image 5.2-3 Formatting content

4. Select the word "unsubscribe" (Image 6.2-4).

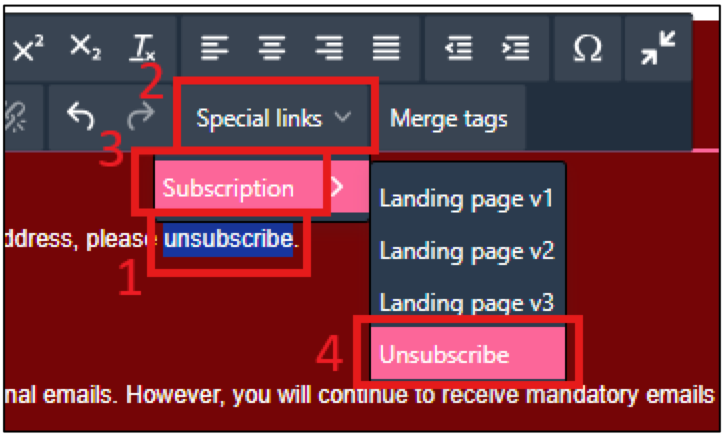

Image 5.2-4 Change selected text into an un-subscription link

5. The selected text will turn into the un-subscription link (Image 5.2-5).

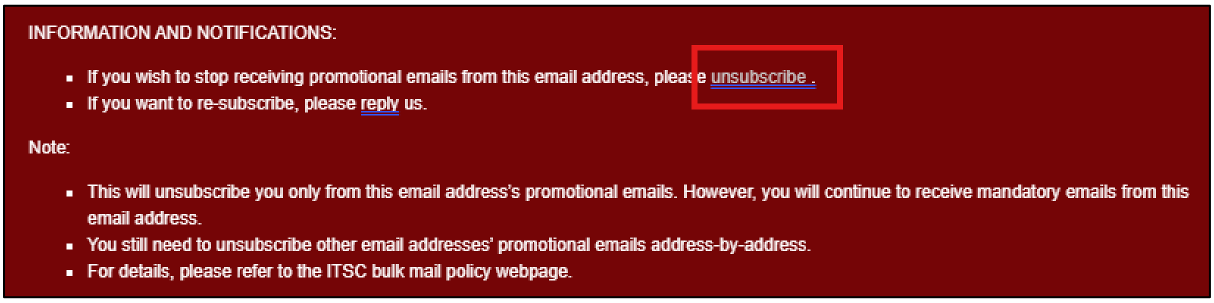

Image 5.2-5 Un-subscription link created