

LISTMAN v5.0 Tutorial

Interactive email subscription list management

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Accessing LISTMAN

Your LISTMAN Admin is located at: _____

You will be prompted for a user name and password to access your LISTMAN.

Your user name is: _____ Your password is: _____

LISTMAN Main Menu

The LISTMAN Main Menu has three options: [Emails](#), [Listmans](#), and [Users](#), and a "Breadcrumb Trail".

[Emails](#)
[Listmans](#)
[Users](#)

The "Breadcrumb Trail" is a navigation tool that allows you to move between menus. When you are at the Main Menu, the Breadcrumb Trail will simply read "> Index".

> [Index](#)

If you click the "Emails" Link, the Breadcrumb Trail will change to "> [Index](#) > [Emails](#)", with the word "[Index](#)" as a link back to the Main Menu. The Breadcrumb Trail will always show the levels above your current position as links, with your current position as bold text at the far right.

> [Index](#) > [Emails](#)

If you have clicked any of the links in the Main Menu, click "[Index](#)" in the Breadcrumb Trail to get back to the Main Menu page

Clicking the "[Emails](#)" link will present you with the following options:

> [Index](#) > [Emails](#)



View: See emails you have sent via LISTMAN

New: Send a new email

Export: Download and email you have sent via LISTMAN

Import: Upload a file to send through LISTMAN

Clicking the "[LISTMANS](#)" link will present you with the following options:

View: See LISTMAN you have set up

> [Index](#) > [Listmans](#)

New: Create a new LISTMAN



Export: Download data from an existing LISTMAN

Import: Upload data for a new LISTMAN

LISTMAN Main Menu (Continued)

Clicking the “Users” link will [> Index > Users](#) present you with the following options:

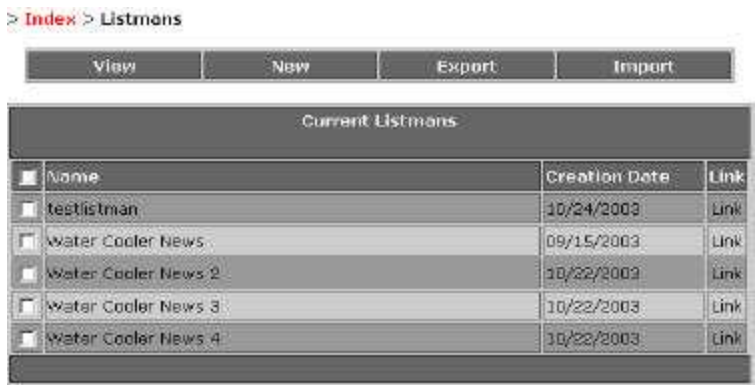


- View: View the list of subscribers to your LISTMAN
- New: Add a new subscriber
- Export: Download your subscriber list
- Import: Upload a list of subscribers
- Custom Fields: Add special data fields to your subscriber list

The “Listmans” Link Creating A new LISTMAN

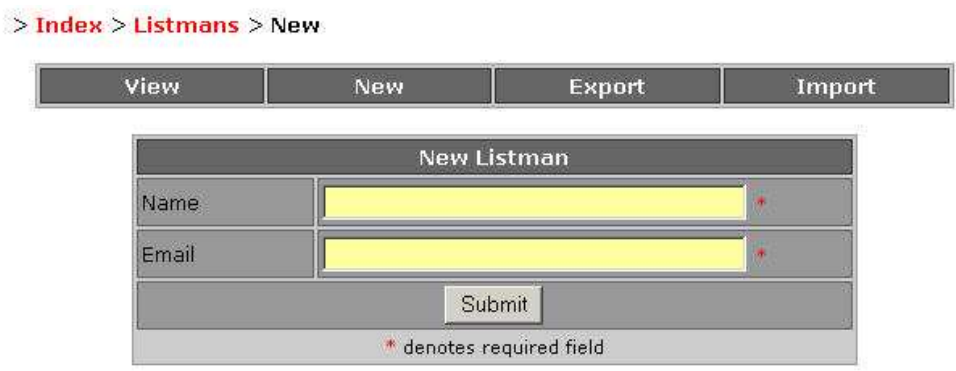
In addition to your normal LISTMAN, it is a good idea to create a “Test” LISTMAN to view your emails before you send them to your Subscribers.

First, click the “LISTMANS” link in the Main Menu. (If you need to get back to the Main Menu, click the “Index” link in the Breadcrumb Trail). You will be presented with a screen similar to the one at the right.



Next, Click “New” to create a new LISTMAN. (Notice how the Breadcrumb trail changes).

You will see a form containing two fields: “Name” and “Email.” in the “Name” field, enter the name of your LISTMAN. If you are creating a test LISTMAN, enter “Test LISTMAN”, so you won’t confuse the Test LISTMAN with your regular LISTMAN! If you are creating your actual LISTMAN, enter something professional, since your subscribers will see the LISTMAN’s name. “ABC Company Newsletter” or something similar would be fine.



The “LISTMAN” Link
 Creating a new LISTMAN (Continued)

In the “Email” field, enter the email address you want your subscribers to see when they receive your email. We recommend using info@yourdomain.com. You must enter a valid email; recipients may wish to reply to your email. Your message may also be considered spam without a valid email address!

When you are satisfied with the information you have entered click “Submit.” You will be shown a screen that confirms the information you have entered.

Click the “LISTMANS” link in the Breadcrumb Trail to get back to the main LISTMAN screen. You will see your new LISTMAN displayed.



If you are not happy with the information you have entered, click the “Link” link in the row of the LISTMAN you want to edit. If you only have one LISTMAN, you will only see one row!

> **Index** > Listmans



After clicking “Link” you will see a screen containing information about the LISTMAN. Click “Edit” in the Menu below the Breadcrumb Trail to edit that LISTMAN.



You will then see a screen similar to the LISTMAN Creation screen. You may change the information as you see fit, then click “Submit” to save the changes.



The “LISTMANS” Link
Viewing Subscribers to your LISTMANS

Click the “LISTMAN” link in the Breadcrumb Trail to go back to the Main LISTMAN page.

If you would like to view the subscribers to a particular LISTMAN, click “Link” next to the LISTMAN.

<input type="checkbox"/>	Test Listman	12/19/2003	Link
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In the Menu directly under the Breadcrumb Trail, click the “Users” link.

> [Index](#) > [Listmans](#) > [Test Listman](#)

View	Edit	Users	Emails
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You will see a list of all the subscribers to this LISTMAN. Most subscribers will have been added through the opt-in LISTMAN subscription form on your website. If you have just created this LISTMAN, you probably won't see any names. If you have users subscribed to other LISTMANS and you would like to add them to this LISTMAN, click the “Subscribe Users” link in the lower left corner, under “Shortcuts”.

> [Index](#) > [Listmans](#) > [Test Listman](#) > [Users](#)

View	Edit	Users	Emails
------	------	-------	--------

Test Listman's Subscribed Users				
<input type="checkbox"/>	Email Address	First Name	Last Name	Link
No records to display				

Action on selected Items per page

Shortcuts
[Subscribe Users](#)

You will see a list of all the users that are not subscribed to this LISTMAN. To subscribe one or more of them, check the box next to their names, then select “Subscribe” in the “Action on selected” dropdown in the lower left of the page.

> [Index](#) > [Listmans](#) > [Test Listman](#) > [Add Users](#)

View	Edit	Users	Emails
------	------	-------	--------

Subscribe A User				
<input type="checkbox"/>	Email Address	First Name	Last Name	Link
<input type="checkbox"/>	andy@onyourmark.com			Link
<input type="checkbox"/>	keith@onyourmark.com			Link

Action on selected Items per page

The “Users” Link

Changing the information you collect

To perform various actions on the subscribers to your LIST-MANs, click “Users” in the Main Menu. (You may need to click “Index” in the Breadcrumb Trail).

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[Emails](#)

[Listmans](#)

[Users](#)

You will see a screen similar to the one at the right. First, you will need to decide what information you will collect from your users. Click the “Custom Fields” link in the Menu directly under the Breadcrumb Trail.

> [Index](#) > [Users](#)

View	New	Export	Import	Custom Fields
Current Users				
1 2 3 4 5 6 7 8 9 10 Next >>				
<input type="checkbox"/>	Email Address	First Name	Last Name	Link
<input type="checkbox"/>	andy@onyourmark.com			Link
<input type="checkbox"/>	andy@phpage.net			Link
1 2 3 4 5 6 7 8 9 10 Next >>				
Action on selected ▾				Items per page ▾

> [Index](#) > [Users](#) > [Custom Fields](#)

View	New	Export	Import	Custom Fields
Custom Fields				
Custom Field 1	Custom Field 1			
Custom Field 2	Custom Field 2			
Custom Field 3	Custom Field 3			
Custom Field 4	Custom Field 4			
Custom Field 5	Custom Field 5			
Custom Field 6	Custom Field 6			
Custom Field 7	Custom Field 7			
Custom Field 8	Custom Field 8			
Custom Field 9	Custom Field 9			
Custom Field 10	Custom Field 10			
<input type="submit" value="Submit"/>				
<small>* denotes required field</small>				

The LISTMAN collects some general information about Subscribers (Email, Salutation, First Name, Last Name, Company, Address 1, Address 2, City, State, Zip, Phone, and Fax), but you may add up to ten custom fields.

For instance, if you would like to know the ages of your subscribers, change the text “Custom Field 1” to “Age” or “Date of Birth.” The information you collect is up to you, but keep in mind that only “Email” is required, so some users may not enter any other information.

When you have customized the information you collect to your liking, click “Submit” to save your settings.

The page where users subscribe to your LISTMAN will automatically update with your new fields.

The "Users" Link

Manually adding users to your lists

Once you have decided what information you are going to collect from your users, you are ready to add some users to your lists.

First click "Users" in the Main Menu.

> Index
Emails
Listmans
Users

Then click "New" in the Menu directly under the Breadcrumb Trail.

> Index > Users > New

View New Export Import Custom Fields

Since this is your LISTMAN, you should subscribe yourself to it. Fill in your information in the form that is displayed. You may add as much or as little as you like. Click "Submit" when you are finished.

> Index > Users > New

View New Export Import Custom Fields

New User

Email	andy@onyourmark.com
Solution	Mr.
First Name	Andrew
Last Name	Lubeck
Company	Kerth Klein & Associates
Address	32601 West Main St
Address (cont.)	
City	Sussex
State	WJ
Zip	53089
Phone	262-820-8201
Fax	262-820-8202

Submit

* denotes required field

User 'andy@onyourmark.com' successfully created.

> Index > Users > andy@onyourmark.com

View Edit Subscriptions

User Info	
Email	andy@onyourmark.com
Solution	Mr.
First Name	Andrew
Last Name	Lubeck
Company	Kerth Klein & Associates
Address	32601 West Main St
Address (cont.)	
City	Sussex
State	WJ
Zip	53089
Phone	262-820-8201
Fax	262-820-8202
Creation Date	Friday, 29th 2003
Subscriptions Info	
Subscriptions	0

You will see a screen containing the information you added. To subscribe this user to a LISTMAN, click "Subscriptions" in the Menu under the Breadcrumb Trail.

The “Users” Link
Manually adding users to your lists (Continued)

You will see a list of this user’s subscriptions (None, since you just added the user). Click the “Add Subscription” link under “Shortcuts.”



You will then see a list of all your LISTMANs. Select the LISTMAN(s) you would like to subscribe this user to, then select “Subscribe” in the “Action on selected” dropdown box.



If you just added yourself, you should subscribe to your main LISTMAN and your Test LISTMAN.

The “Users” Link
Editing Information about your subscribers

You may need to edit information about your subscribers once they have subscribed. Select “Users” in the Main Menu.

> [Index](#)
[Emails](#)
[Listmans](#)
[Users](#)



Select “Link” next to the User you wish to edit.

You will be shown the User’s information. Select “Edit” in the Menu under the Breadcrumb Trail.



From here, you may make the appropriate changes. Select “Submit” at the bottom of the page when you are done making changes.

The “Emails” Link
Sending an email to one or more LISTMANs

Once you have a LISTMAN set up, and at least one user subscribed, you are ready to start sending emails to your LISTMAN.

> **Index**
Emails
Listmans
Users

First click “Emails” in the Main Menu. Then select “New.”

> **Index** > **Emails**



> **Index** > **Emails** > **New**

A form with three fields (Subject, Message, and Send To) will be displayed. The Subject field will be the Subject of the email you send. You should have a consistent name for each of your emails. A good name would be “ABC Company Newsletter #1.” This way, your subscribers will know your newsletter instantly. The Subject should contain your company name, for easy identification.

Next, enter the message you would like to send in the “Message” field. You may want to type your email in another program like Notepad or Word first, but keep in mind that bold text and other formatting will be lost. If you would like to send emails with more formatting, including HTML email, contact Keith Klein & Associates, Inc. about our eSponse service. You may also visit www.eSponse.com.

After you enter your message, select one or more lists in the “Send To” box. You may select more than one list by holding “Ctrl” and clicking. We suggest sending your email to the Test LISTMAN first (if you set one up). This will allow you to see the email as your subscribers will, before they see it.

When you are ready to send your message, click “Submit” and it will be immediately sent to everyone subscribed to the LISTMANs you selected.

The "Emails" Link

Viewing Previously sent emails

First go to the Main Menu screen.

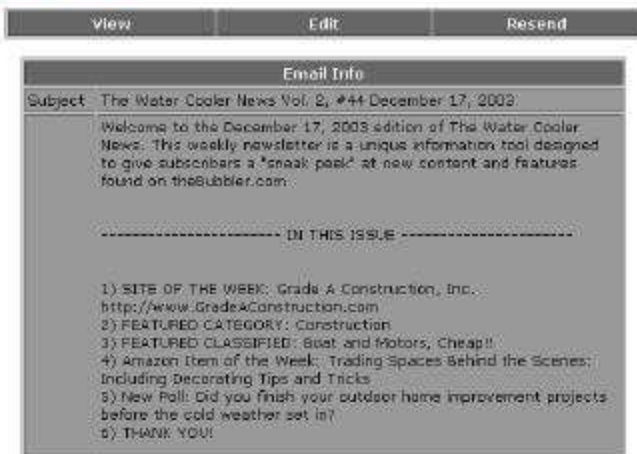
Then select "Emails." The list of previously sent Emails will be displayed.

> Index
Emails
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Users

This page is useful in keeping the subject line of your emails consistent. To view the message portion of a previously sent Email, select "Link" next to the corresponding Email.



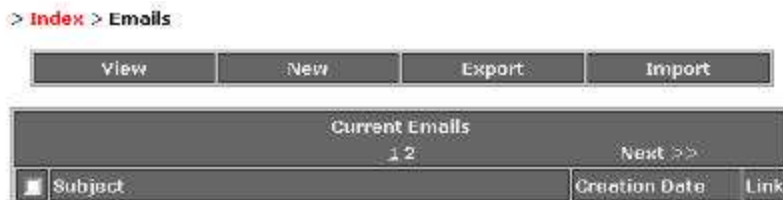
> Index > Emails > The Water Cooler News Vol. 2, #44 December 17, 2003



The information you sent will be displayed.

Miscellaneous LISTMAN Options

There are some options that apply to all of the "Emails," "LISTMANs," and "Users" menus.



In the "View" page, you will be able to sort your data by clicking on the text in the header of the table.

In the lower right corner of many pages, there is a dropdown menu that reads "Items per page." This option allows you to show more on each page, which is helpful when you start sending many emails, and your list grows larger.



The "Emails" Link

Viewing Previously sent emails (Continued)

You may also view all the emails sent by a particular LISTMAN.

Click "[LISTMANS](#)" in the Breadcrumb Trail to return to the main LISTMAN screen. To view emails sent from a particular LISTMAN, Click "Link" next to the LISTMAN.

> [Index](#) > [Listmans](#)

View	New	Export	Import
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Current Listmans			
<input type="checkbox"/>	Name	Creation Date	Link
<input type="checkbox"/>	Test Listman	12/19/2003	Link

Then, click "Emails" in the Menu under the Breadcrumb Trail.

> [Index](#) > [Listmans](#) > [Test Listman](#)

View	Edit	Users	Emails
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> [Index](#) > [Listmans](#) > [Water Cooler News](#) > [Emails](#)

<input type="checkbox"/>	Subject	Creation Date	Link
<input type="checkbox"/>	The Water Cooler News Vol. 2, #44 December 17, 2003	12/17/2003	Link
<input type="checkbox"/>	The Water Cooler News Vol. 2, #43 December 10, 2003	12/10/2003	Link
<input type="checkbox"/>	The Water Cooler News Vol. 2, #42 December 3, 2003	12/03/2003	Link
<input type="checkbox"/>	The Water Cooler News Vol. 2, #41 November 26, 2003	11/26/2003	Link
<input type="checkbox"/>	The Water Cooler News Vol. 2, #40 November 19, 2003	11/19/2003	Link
<input type="checkbox"/>	The Water Cooler News Vol. 2, #39 November 12, 2003	11/12/2003	Link
<input type="checkbox"/>	The Water Cooler News Vol. 2, #38 November 5, 2003	11/05/2003	Link
<input type="checkbox"/>	The Water Cooler News Vol. 2, #37 October 29, 2003	10/29/2003	Link
<input type="checkbox"/>	The Water Cooler News Vol. 2, #36 October 22, 2003	10/22/2003	Link
<input type="checkbox"/>	The Water Cooler News Vol. 2, #35 October 15, 2003	10/15/2003	Link
<input type="checkbox"/>	The Water Cooler News Vol. 2, #34 October 8, 2003	10/08/2003	Link

You will be shown a list of each of the emails you have sent. If this is a new LISTMAN, there won't be any emails in the list.

To view an Email, click "Link" next to the Email you wish to view.

> [Index](#) > [Emails](#) > [The Water Cooler News Vol. 2, #44 December 17, 2003](#)

View	Edit	Resend
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Email Info	
Subject	The Water Cooler News Vol. 2, #44 December 17, 2003
Welcome to the December 17, 2003 edition of The Water Cooler News. This weekly newsletter is a unique information tool designed to give subscribers a "sneak peek" at new content and features found on theBubbler.com	
----- IN THIS ISSUE -----	
1) SITE OF THE WEEK: Grade A Construction, Inc. http://www.GradeAConstruction.com	
2) FEATURED CATEGORY: Construction	
3) FEATURED CLASSIFIED: Boat and Motors, Cheap!!	
4) Amazon Item of the Week: Trading Spaces Behind the Scenes: Including Decorating Tips and Tricks	
5) New Poll: Did you finish your outdoor home improvement projects before the cold weather set in?	
6) THANK YOU!	

The entire email will be displayed.

Advanced LISTMAN Options

The “Export” Option

The Export option found in many of the menus is used to download information about your users, previously sent emails, or LISTMANs.

First, go to the section you would like to export data from.

> [Index](#) > [Emails](#)



To download the information, click “Export” in the appropriate section. You will be shown a list of formats to download in.

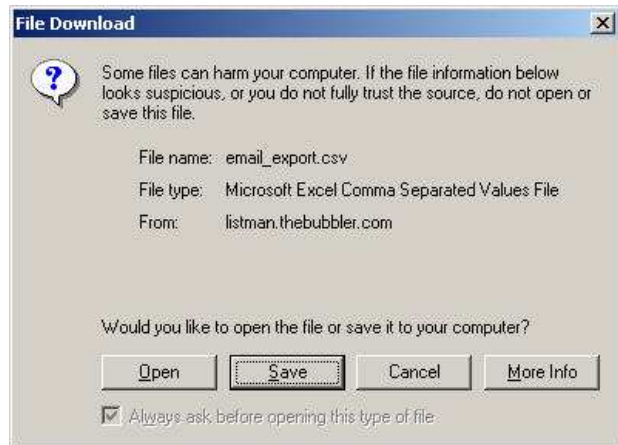
> [Index](#) > [Emails](#) > [Export](#)

The only format that is currently available is CSV, which is a comma separated text file. This file can be opened by many different programs such as Microsoft Excel or Notepad.

A dialog box titled "Export Emails". It has a "Format:" label and a radio button selected next to "CSV". There is a red asterisk next to "CSV". Below the format selection is a "Submit" button. At the bottom, there is a note: "* denotes required field".

Then click the “Submit” button.

A Windows file download box will appear. Select “Save” in the File Download box that appears.



Simply choose where you would like to save the file.



Advanced LISTMAN Options

The “Import” function

The “Import” function of the LISTMAN is used to take data, such as a customer list, and save it into your LISTMAN.

To use this feature, go to the section you want to Import to, for example “> Index > Users.”

> [Index](#) > [Users](#) > [New](#)

Then click the “Import” link.



> [Index](#) > [Users](#) > [Import](#)



Import Users

CSV File *

* denotes required field

Click the browse button, then use the box that pops up to find the CSV file on your computer.



After you find the file, click the “Open” button. The file’s location will appear in the text box on the page. Click “Submit” to upload the file to LISTMAN.

> [Index](#) > [Users](#) > [Import](#)



When you have done this, you will be shown a screen containing the fields in your file and a list of the available fields in LISTMAN. The top half of the page contains information the LISTMAN was not able to match against existing fields. The bottom half of the page contains the fields the LISTMAN was able to match.

> [Index](#) > [Users](#) > [Import](#)



For example, if your CSV file has a “URL” column for a subscriber’s web address, but the field is called “Custom field 9” in LISTMAN, the fields will need to be matched before LISTMAN can import.

To match your data to the available fields, click one of the options in the left column, then click the matching option in the right column. When you have a match, click “Link” and the fields will be added to the lower table.

Advanced LISTMAN Options

The "Import" function (Continued)

There are some guidelines you should follow when you set up a file to be imported into LISTMAN.

The file must be a valid CSV file. A CSV file is a text file containing values separated by commas. This isn't as intimidating as it sounds. See the screenshot of a valid CSV file.



The first row of the CSV file must be the name of the field, as in the screenshot.

The easiest way to obtain a CSV file is to save spreadsheet as a .CSV file in Microsoft Excel. If you are unsure of how to do that, consult the help menu in Excel.

LISTMAN Assistance

For assistance with LISTMAN, please contact us at 262.820.8201 (800.747.3399 outside greater Milwaukee). We are happy to help you!