Campaign Coach

Welcome to the Campaign coach. This file is designed to help you get started creating a mailing in Campaign. It provides step-by-step instructions on setting up a new mailing, so leave this window open and follow the instructions.

To skip the Campaign coach during this session, click the Close button below.

{button Close,Exit()}

To prevent the coach from opening on startup in the future, choose Options from the main menu, then click the **Do not show startup tutorial** checkbox.

Let's get started!

What do you want to do?

» Use Campaign for the first time
» Set up an e-mail campaign
» Automate a mailing

Using Campaign for the first time

Get an overview of how Campaign works
Set up my own mailing

Overview of how Campaign works

There are four main steps in creating a mailing in Campaign.

1. Find a data source and define your audience

   You are probably accustomed to using an address book or a recipient list for sending e-mail.

   But instead of a recipient list or address book, Campaign reads e-mail addresses and other data directly from your database file.

   The Database Filter screen is where you will first identify a data source containing your recipients' e-mail addresses and other data, and then define your audience based on information in your database. Decide who you want to reach, and configure the Filter accordingly.

2. Write a message

   After you decide who will receive your e-mail, you need to write the text of the message. In Campaign's Message Editor, you can compose a new message, as well as import or paste text from another application. You can also add attachments to your e-mail in the Message Editor.

   If you want to personalize messages, you can add merge variables to the message text. When you merge the e-mail, variables in the message will be replaced with data from your database.

3. Merge the e-mail

   A Merge It Task generates individual e-mail messages for each of your recipients. On this screen, choose a database filter and a message to use in the merge process, which generates e-mail and queues it to Campaign's Out mailbox. You can also use a Merge It Task to set up an automated e-mail campaign that communicates regularly with your customers, prospects, members, subscribers or any other important contacts.

4. Send the e-mail

   A Mail It Task actually sends the mail created in the previous step. Messages will be queued in the Campaign Out mailbox until you run a Mail It Task.

   Campaign can send e-mail either through a direct connection to an SMTP mail server, or by transferring messages to your favorite e-mail client, such as Lotus cc:Mail or Microsoft Outlook.

Set up my own mailing

Instead of using these instructions, you can use Campaign's interactive Project Wizard to set up a mailing.

To open the Wizard, open the Projects window (choose View > Projects if the Projects window is hidden) and click New. Click **Yes** in the dialog box that asks if you want to run the Project Wizard.

To continue using this startup tutorial, click the Continue button.

{button Continue,JI(`>Main',`StepOne.Findadatasourceanddefineyouraudience')}

Step One: Find a data source and define your audience

In Step One of a mailing, create a new Database Filter. In the Filter, you will first locate the database file that has your recipients' information, then define your audience.

{button Next,JI(`>Proc',`StartbycreatinganewFilter.');CW(`main')}

Start by creating a new Filter.

1. Choose View > Database Filters.

   The Database Filters window appears. This window lists all the available Filters.

2. Click **New**.

3. Name the Filter and click **OK**.

   The Database Filter configuration screen appears.

{button Next,JI(`>Proc',`Locatethedatasource')}

Locate the data source

1. Click **Browse**.
2. In the Browse box, open the **Type of Database** drop-down box. This menu lists database applications and formats that are compatible with Campaign.
3. Choose the database application you want to use.

   (Click here if your application is not listed)
4. Locate the database file on your hard drive or network.
5. Click **OK** to return to the Database Filter configuration screen.
6. If you are using a Microsoft Access or Excel data source, open the **Table name** drop-down box. Choose a specific table, query or sheet to use as the data source.

{button Next,JI(`>Proc',`Defineyouraudience')}

Define your audience

1. Click the **Basic** tab.
2. The rows of boxes on the Database Filter configuration screen are divided by two headers: **Database Fields** (the single column of boxes at the left) and **Criteria** (the remaining six columns).

   Fields mean the field names in your database file, while *Criteria* refers to the data in those fields.
3. Open the drop-down box at the top of the Database Fields column. The menu lists all the fields in your data source.

   Choose a field containing information you want to filter. For example, you would choose a field called LastName if you wanted to filter records based on the recipients' last names.
4. Open the menu to the right of the Fields column. This menu contains operators, which describe how to filter the field data. There are different operators for text, numeric, date, and true/false database fields.

   (Fortunately, you don't have remember all the different operators. Campaign will auto-detect the field type and provide the corresponding operators for you to choose from.)
5. In the next field to the right, enter the filter criteria. The filter criteria is the text string or value that defines your audience.

   For example, if you want to send e-mail to your contacts who live in Maine, then the text string "Maine" would be the criteria. You can use words, letters, numbers or calendar dates as filter criteria.
6. Repeat the above steps for the remaining fields if you want to narrow the filter further. You can search up to five fields, using three criteria per field.

{button Next,JI(`>Proc',`ChecktheFilterresults')}

Check the Filter results

1. Click **Preview**. The Filter Preview screen appears.

   The Filter Preview displays a table of all the database records matching the current filter, along with a count of the total matching records.

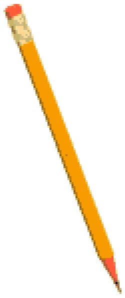
   If there are no matching records, check the filter criteria and edit as necessary until the filter is successful.

2. When you finish previewing, click **OK** to close the Preview screen.

3. On the Database Filter configuration screen, click **OK** to save and exit.

{button Step Two,JI(`>Main',`StepTwo.Writeamessage');CW(`proc')}

Step Two: Write a message



After creating a database filter to define your audience, you now need to write a message. You can compose the e-mail text in Campaign's Message Editor, or you can paste or import a text from another application.

You can also attach files to your e-mail with the Message Editor.

{button Next,JI(`>Proc',`Createanewmessage');CW(`main')}

Create a new message

1. Choose View > Messages.
2. The Messages window appears. This window lists all the Messages in the storage file.
3. Click **New**.
4. Name the Message and click **OK**.
5. The Message Editor appears.

{button Next,JI(`>Proc',`Writethetext')}

Write the text

1. Type in the subject and body of the message.
2. You can also paste text (choose Edit > Paste) from a different application, or import text from a plain text (.txt) file.

    To import a text file, click **Import Text**.

    To check spelling, click **Check Spelling**.

{button Next,JI(`>Proc',`Addmergefields')}

Add merge fields

A merge field is placeholder text that is replaced with data during the merge process.

The format for merge variables is a database field name enclosed in braces { }.

For example, suppose you keep your contacts' first name in a database field labeled "FirstName." When you add the variable of {FirstName} to the message, it will be replaced during the merge process with each person's first name.

{button ,JI(`>Example',`Mergefields')} Example

To add a merge field

1. Open the **Get fields from this database filter definition** drop-down box. The menu lists all the available Database Filters. Choose the Database Filter you created in Step One.
2. Position the cursor at the location in the subject or message body where you want to add the merge variable.
3. Under **Fields available to insert**, you will see a list of database fields. Double-click on a field name to use as a merge variable.
4. The merge variable is placed in your message or subject at the insertion point.
5. Click **OK** to save and exit.

{button Step Three,JI(`>Main',`StepThree.Mergethee.mail');CW(`proc')}

Merge fields

Suppose your database has three fields:

FirstName, **LastName**, and **Email**.

It has three records:

```
John, Doe, jdoe@isp.com

Quentin, Kopp, kopp@sf.com

Cam, Payne, campaign@arialsoftware.com
```

Your message uses the field names as merge variables:

```
Hello {FirstName},

Best wishes to everyone in the {LastName} household.

Is {Email} still your correct e-mail address?
```

The merge process then generates three messages, which now have the recipient's data instead of the field name:

```
To: jdoe@isp.com

Hello John,

Best wishes to everyone in the Doe household.

Is jdoe@isp.com still your correct e-mail address?
```

```
To: kopp@sf.com

Hello Quentin,

Best wishes to everyone in the Kopp household.

Is kopp@sf.com still your correct e-mail address?
```

```
To: campaign@arialsoftware.com

Hello Cam,

Best wishes to everyone in the Payne household.

Is campaign@arialsoftware.com still your correct e-mail address?
```

Step Three: Merge the e-mail

At this point in your new mailing, you have a data source containing addresses and other recipient information, and a message to send. Now it's time to merge recipient data into the message. Merging is done through a Task called Merge It, which you will set up in the next step.

{button Next,JI(`>Proc',`CreateanewProject');CW(`main')}

Create a new Project

1. Choose View > Projects.
2. The Projects window appears. This window lists all the Projects in the storage file.
3. Click **New**.
4. Name the Project "Merging" and click **OK**.

{button Next,JI(`>Proc',`AddaMergeItTasktotheProject')}

Add a Merge It Task to the Project

1. Click **Add Task**.

   The Add Task window appears.

2. Choose **Merge It** and click **Add**.

   The Merge It screen appears. On this screen, you will specify a database filter and a message to merge.

{button Next,JI(`>Proc',`ChooseaDatabaseFilterandMessageformerging')}

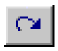
Choose a Database Filter and Message for merging

1. Look at the top three fields to the left of the screen.
2. These fields provide the information necessary for the merging process: the database filter for your recipient information and the e-mail message you want to send.

   All three fields use drop-down boxes to provide the necessary information.

- **Use this database filter definition**

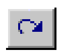
  This drop-down box lists all of Campaign's Database Filters. Choose the one you created in Step One.

  To view a filter, click the  button to open the Database Filters window, select a filter, and click **Edit**.
- **Get e-mail address from field**

  This menu lists all the fields in the database used by the filter selected in the previous field. Choose the field that contains your recipients' e-mail addresses.

  Campaign will try to auto-detect the correct e-mail address field. If it chooses an incorrect field, open the drop-down box and choose the correct field.
- **Use this e-mail message**

  This menu lists the e-mail messages available for Campaign to send. Choose the one you created in Step Two.

  If you want to view the text of the messages, click the  button to open the Messages window, select a message, and click **Edit**.

3. Click **OK** to save and exit the Merge It screen.
4. On the Tasks window, click **Close** to return to the Projects window.

{button Next,JI(`>Proc',`Mergethee.mail')}

Merge the e-mail

1. In the Projects window, select the Project you just created.
2. Click **Run**.

   Running a Project executes all the individual Tasks within the Project. Your Project only contains one Merge It Task, so Campaign will only carry out that single Merge It.
3. The Merge It Task merges data into the e-mail message, generating an individual piece of e-mail for each recipient. As the Task runs, a progress bar shows the number of messages being generated. At the end of the merging process, a status report screen displays a summary of the Project that just ran.
4. After the messages are generated, they are queued to Campaign's Out mailbox. You can preview the messages by choosing Mailbox > Outbox.
5. At this point, you *merged* the messages and queued them; the remaining step is sending them.

{button Step Four,JI(`>Main',`StepFour.Sendthee.mail');CW(`proc')}

Step Four: Send the e-mail

With the messages queued in Campaign's Out mailbox, the remaining step in your mailing is to send the e-mail. Sending messages requires a Task called Mail It, which provides information about your e-mail account that Campaign needs to send e-mail.

You can send mail directly with Campaign by connecting to a mail server, or you can transfer e-mail to another mail application such as Outlook, cc:Mail, or GroupWise.

{button Next,JI(`>Proc',`CreateadifferentProjectformailing');CW(`Main')}

Create a different Project for mailing

1. Choose View > Projects.
2. Click **New**.
3. Name the Project "Mailing" and click **OK**.

{button Next,JI(`>Proc',`AddaMailItTasktothecurrentProject')}

Add a Mail It Task to the current Project

1. Click **Add Task**.

   The Add Task window appears.

2. Choose **Mail It** and click **Add**.

3. The Mail It screen appears. On this screen, enter information about your e-mail account or mail server that Campaign needs to send mail or transfer it to another e-mail application.

{button Next,JI(`>Proc',`Entersendinginformation')}

Enter sending information

Open the **Send mail via** drop-down box. This menu lists Campaign's sending options.
More about sending options

How do you want to send e-mail?
Through a direct SMTP mail server connection
Through another e-mail application

(Campaign is compatible with Outlook/Exchange (and any MAPI-compliant application), cc:Mail, Notes, GroupWise, and Banyan VINES)

Send through a direct SMTP mail server connection

1. Choose **SMTP method #1** or **SMTP method #2**.

   (Use **SMTP method #1** if you are sending e-mail with attachments. SMTP method #2 does not support attachments.)

2. Enter information in the SMTP Settings box.

- **SMTP Host Name:**

  Enter the name of your SMTP mail server.

  If you are not sure of the mail server name, check the settings in your primary e-mail application. Contact your network administrator or Internet Service Provider if you are still unsure.

  Alternately, you can use the mail server's IP address if you know it; otherwise, use the server's host name.

- **Return e-mail address**:

  Enter your e-mail address or another address to use as the reply address.

3. Click **Save** to save and continue.
4. On the Tasks window, click **OK** to return to the Projects window.

{button Next,JI(`>Proc',`Sendthequeuede.mail')}

Send the queued e-mail

1. Before you start sending e-mail, check that your computer is connected to the Internet. If you have a dial-up e-mail account, use your modem to open an Internet connection now.
2. On the Projects window, select the "Mailing" Project.
3. Click **Run**.

   Campaign will contact the mail server and begin sending the queued e-mail.
4. As the mail is sent, a Progress bar displays the number of messages being sent and the estimated time needed to complete the mailing.
5. When the mailing is complete, Campaign displays a status report that summarizes the mailing. To print the report, click **Print**.

{button ,JI(`>main',`Whatdoyouwanttodo.');CW(`proc')} Go back to the main menu

Send through another e-mail application

1. Choose the e-mail application to use for sending Campaign's e-mail.

- Microsoft Outlook
- Microsoft Exchange
- Lotus cc:Mail
- Lotus Notes
- Novell GroupWise
- Banyan VINES

2. Now enter information your e-mail account information.

   Find the **Profiles Settings** box. Enter your e-mail account information in the two fields.

- **Profile Name**: Enter the profile or username for your e-mail account.
- **Password**: If applicable, enter the password to your e-mail account.

3. Click **Save** to save sending information and continue.
4. Click **OK** on the Tasks window and return to the Projects window.

{button Next,JI(`>Proc',`Transfermessagestoyourmaine.mailapplication')}

Transfer messages to your main e-mail application

Before you send the messages, make sure your main e-mail application (the one you entered in the Mail It **Send mail via** field) is running. Also ensure that your computer is connected to the Internet, either through an office LAN or a dial-up account.

When you run the "Mailing" project, Campaign will transfer its queued messages to your main e-mail application.

If your main e-mail application is set up to queue messages for you to send manually, you will need to open your main e-mail client and send the messages that Campaign transferred.

However, if your e-mail application is set up to send mail immediately (without queuing) your messages will be sent as soon as they are transferred from Campaign.

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1. In the Projects window, select the "Mailing" project.
2. Click **Run**.
3. The Project progress bar appears. It displays the total number of messages to be sent and their estimated sending time.
4. When all messages have been transferred, the Project Completion Status report appears with a summary of the sending process. Click **Print** for a hard copy of the report, or click **OK** to continue.
5. Open your main e-mail application and view the Outbox contents.
6. If you have your e-mail application set to send mail immediately, the messages will be marked as sent.

   Conversely, if your e-mail application does not send mail immediately, the messages from Campaign will be queued and waiting to send. Send the messages as you would normally.

Go back to main page

More About Sending options

The way you send e-mail with Campaign depends on the type of Internet connection you have and your preference of e-mail client.

• Direct SMTP connection

SMTP stands for Simple Mail Transfer Protocol, a widely used method for sending e-mail through the Internet.

A direct SMTP connection is the fastest method for sending messages with Campaign, because it lets Campaign communicate directly with your mail server.

However, if your computer is on an office LAN that uses a proxy server, you probably will not be able to send mail with a direct connection. Instead, Campaign can be used with your main e-mail client to send e-mail.

If you have a dial-up e-mail account through an Internet Service Provider or web hosting service, your connection is most likely an SMTP connection.

Different flavors of SMTP

Notice that the Mail It Task provides a choice between **SMTP method #1** and **SMTP method #2**.

Each method uses the SMTP sending protocol, but through a different internal process in the Campaign software. The choice is available to ensure that Campaign works with all SMTP mail servers. So if you find that one SMTP option creates difficulty with your mail server, use the other one.

A notable difference between the SMTP options is that SMTP method #2 does *not* support e-mail attachments. If you want to send messages through SMTP and attach files to your e-mail, use SMTP method #1. Attachments work with all of Campaign's sending options except SMTP method #2.

• Other e-mail clients

You can use Campaign to merge e-mail from your database, but actually send the messages using your main e-mail client application.

Campaign must be used with another e-mail client if your computer is on a Local Area Network that uses a proxy server. The SMTP option will not work with a proxy server.

Campaign works with the following e-mail client software:

- Lotus cc:Mail
- Lotus Notes
- Microsoft Outlook
- Microsoft Exchange
- Novell GroupWise
- Banyan VINES

Advanced users may prefer to choose a specific mail sending protocol in the Mail It Task, including the VIM, MHS, or MAPI protocols.

Setting up an e-mail campaign

An e-mail campaign is a series of related, timed messages sent according to a preset schedule. Campaign can send automated follow-up messages to new customers, automate backend sales to existing customers, market to new prospects, or encourage an ongoing customer service dialog. While a single e-mail message broadcast may have a one-time impact, a well-planned and well-executed e-mail campaign can increase your response rate and establish lasting customer loyalty.

If you are using Campaign for the first time, it is recommended that you set up a basic mailing before using the campaign scheduling feature.

What do you want to do?

Learn more about how campaign scheduling works

Set up my own campaign

How campaign scheduling works

An e-mail campaign is based on relative sending dates; all messages in a campaign are sent relative to a specific starting date in your database.

Example

Suppose you have a short e-mail campaign intended for your new customers. When a customer makes a purchase from your company, a new record with their contact information is added to your customer database, and the e-mail campaign starts.

There are three messages in the campaign:

First Message

Thank you message; sent 3 days after purchase.

Second Message

Follow-up to order; sent 10 days after purchase.

Third Message

Request for comments/suggestions; sent 30 days after purchase.

Here are three customers, their starting date (the Purchase Date column) and how the e-mail campaign will work for them.

Customer	Purchase Date	Message 1: 3 days later	Message 2: 10 days later	Message 3: 30 days later
Ephram	**1/5/98**	1/8/98	1/15/98	2/5/98
Kristen	**1/8/98**	1/11/98	1/18/98	2/8/98
Pat	**1/20/98**	1/23/98	1/20/98	2/20/98

Because the sending intervals are relative to the customer's purchase date, the campaign is tailored to *each* customer. The actual calendar dates on which each person receives each message is different, but all customers get the first message 3 days after their purchase date, the second message 10 days after their purchase date, and the third message 30 days after.

Also notice that you never actually enter a calendar date when configuring a campaign. Instead, you specify a database field containing a calendar date, and the number of days after the purchase date for each message to be sent.

Set up my own campaign

Before you start, you will need to prepare your database and Campaign to run an e-mail campaign.

What you will need:

In your database

- A starting date field

  The starting date can be any date that provides a reference point for the e-mail campaign, such as the date a customer is added to your database.

  This field must be a date type field. Text or numeric database fields will not work.

- A field for the campaign status

  Campaign needs a status field to keep track of the e-mail campaign's progress for each recipient.

  To set up a status field, create a new numeric field in your database and call it CampaignStatus (or something similar). Do not add data to this field. The status field must be a numeric type field. Text or other field types will not work.

In Campaign

- The messages that will constitute the e-mail campaign. You will need at least two messages to run an e-mail campaign.

Click here to open the main help file for more information about e-mail campaign prerequisites.

Proceed with my e-mail campaign

First message

Start by creating a new Project and a new Merge It Task.

{button Next,JI(`>Proc',`CreateanewProjectandaddaMergeItTask')}

Create a new Project and add a Merge It Task

1. Choose View > Projects.
2. Click **New**.
3. Name the new Project and click **OK**.
4. In the Add Task window, choose **Merge It** and click **Add**.

   The Merge It screen appears.

{button Next,JI(`>Proc',`EnterbasicMergeItconfigurationdata')}

Enter basic Merge It configuration data

- **Use this database filter definition**

  Choose a database filter for the data source.

- **Get e-mail address from field**

  Choose the database field that contains your recipients' e-mail addresses.

  Campaign will try to auto-detect the address field; if it picks the wrong field, choose the correct one.

- **Use this e-mail message**

  Choose the *first* message of the e-mail campaign.

{button Next,JI(`>Proc',`Adde.mailcampaignscheduling1')}

Add e-mail campaign scheduling

1. Check the Enable e-mail scheduling checkbox. The grayed-out text and fields below the checkbox become active.

   Enter information in the three fields that are now active:

- **Field containing campaign starting date**

  This drop-down box lists all the fields in your data source. Choose a calendar date field to use as the e-mail campaign's starting point.

- **Number of days after campaign start date to e-mail this message**

  The value in this field determines when the message will be sent. Enter the number of days after the starting date that the campaign's first message should go out.

  For example, if you enter 3, the first message in the campaign will be sent 3 days after the starting date. To send the message on the same day as the starting date, enter 0.

- **Field to reserve for campaign status**

  This drop-down box lists all the fields in your database. Choose a field that has been set aside for Campaign to record the status of the e-mail campaign.

  For example, if you have a numeric field called "Status" or "CampaignStatus" set aside for Campaign to use for status tracking, use that field here.

1. Click **OK** to save and exit the Merge It screen.
2. Leave the Tasks window open, because you are going to add another Task to the same Project.

{button Second message,JI(`>Main',`SecondMessage')}

Second Message

1. In the Tasks window, click **Add Task**.
2. Choose **Merge It** and click **Add**.

{button Next,JI(`>Proc',`EnterMergeItconfigurationdata')}

Enter Merge It configuration data

For this new Merge It Task, enter information for merging the second message in the e-mail campaign.

- **Use this database filter definition**

  Choose a Filter to use as the data source. Use the same Filter used for the first message in the campaign.

- **Get e-mail address from field**

  Choose the database field that contains your recipients' e-mail addresses. Campaign will try to auto-detect the address field; if it picks the wrong field, choose the correct one.

- **Use this e-mail message**

  Choose the *second* message in the e-mail campaign.

{button Next,JI(`>Proc',`Adde.mailcampaignscheduling2')}

Add e-mail campaign scheduling

1. Check the **Enable e-mail scheduling** checkbox.

   Configure the campaign scheduling data:

- **Field containing campaign starting date**

  Choose the same calendar date field you used for the first message.

- **Number of days after campaign start date to e-mail this message**

  Enter the number of days after the starting date for the *second* message to go out. For example, if the second message goes out two weeks after the starting date, enter 14 in this field.

- **Field to reserve for campaign status**

  Choose the same status field you used for the first message.

2. Click **OK** to save and exit the Merge It screen.

{button Next,JI(`>Proc',`Thirdandsuccessivemessages')}

Third and successive messages

By now, the procedure for setting up and scheduling additional messages in an e-mail campaign should be clear.

Each message in the campaign requires a separate Merge It Task. Much of the configuration data is the same among messages, including the database filter, e-mail address field, campaign starting date and status fields.

The only differences are the message (specified in the **Use this e-mail message** field) and the sending date (the **Number of days after campaign start date to e-mail this message** field) used by each Merge It Task.

So to add a third message to the e-mail campaign, create another Merge It Task in the same Project, and enter the same data used in the previous two Tasks, *except* in these fields:

- **Use this e-mail message**

  Choose the *third* message in the e-mail campaign.

- **Number of days after campaign start date to e-mail this message**

  Enter the number of days after the starting date for the third message to go out.

Go back to Main page
How do I send e-mail?

Automate a mailing

Campaign can automate any Project to run unattended.

On Campaign's Schedule screen, automating a Project simply requires choosing a Project and the frequency for it to run; options range from once a minute to once a day.

What do you want to do?

{button ,JI(`>proc',`AutomateaProject');CW(`main')} Automate a Project

{button ,JI(`>main',`StepOne.Findadatasourceanddefineyouraudience');CW(`Main')} Create a new Project

Automate a Project

If you use a dialup account to send e-mail, you will need to add modem dial and hangup Tasks to your Project.

How does your computer connect to the Internet?

{button ,JI(`',`Dialup')} Dialup

{button ,JI(`',`Createanewscheduleentry')} Network

Dialup

If you are automating a Project that sends messages through your dialup e-mail account, the Project must contain a RAS Dial Task and a RAS Hangup Task, in order to open and close an Internet connection.

Use this sequence of Tasks in a Project:

- RAS Dial
- MailIt
- RAS Hangup

A Project used only to merge e-mail without sending it does not need an Internet connection.

To create an RAS Dial Task

1. On the Projects window, click **Add Task**.
2. Choose **RAS Dial** and click **Add**.
3. From the **RAS Phonebook Entry** drop-down box, choose the entry for your e-mail account.
4. Click **OK**.

{button Next,JI(`>Proc',`CreateanewScheduleentry')}

Create a new Schedule entry

1. Choose View > Schedule.
2. Click **Add**.
3. Name the Schedule entry and click **OK.**
4. The Schedule screen appears.

{button Next,JI(`>Proc',`SchedulettheProject')}

Schedule the Project

1. Fill in the three fields on the Schedule screen.

- **Project To Run**

  This menu lists all the available Projects. Choose the one you want to automate.

- **Run Every**

  This menu lists the available intervals for the Project to run. The options range from the smallest interval of once every minute, to the longest of once per day.

- **Active**

  Checking the Active checkbox makes the Schedule item ready to run. If the box is not checked, the Schedule item will not run.

2. Click **OK**. On the Schedule window, click **OK**.
3. Choose View > Projects.
4. Check the **Schedule Active** checkbox. When the Schedule is active, the graph icon will be animated.
5. After the scheduled project runs, the time and date is recorded on the Schedule window.

{button ,JI(`>main',`Whatdoyouwanttodo.');CW(`proc')} Go back to main page


SMTP Settings
SMTP Host Name or IP Address:
mail.arialsoftware.com
Return E-Mail Address:
info@arialsoftware.com

For most e-mail accounts with a commercial Internet Service Provider, the SMTP host name will be in one of these formats:

mail.domain.com

smtp.domain.com

where "domain.com" is the ISP's domain name (such as att.net for AT&T WorldNet or msn.com for the Microsoft Network).

If your computer is on a Local Area Network with a mail server, the host name may be different.

The IP (Internet Protocol) address is a unique string of numbers (like 204.159.111.101) identifying a computer on the Internet. Use the mail server's IP address only if you definitely know it.


Enable e-mail campaign scheduling
Calendar Functions
Field containing campaign starting date:
PurchaseDate
Number of days after campaign start date
to e-mail this message:
3
Field to reserve for campaign status:
Status