



TouchBase^{Pro}

The simplest message distribution service

57 Buckingham Avenue, Craighall Park, Johannesburg, South Africa
(Tel) +27 11 447 9716 / +27 10 500 0024 | **(Fax)** 011 507 5813
[2004/093971/23](#)



TouchBasePro

How to use TouchBasePro

A simple step by step guide



Introduction

TouchBasePro is a pretty easy system to use, but sometimes a step by step guide helps.

NOTE: All the underlined Orange text in this guide is a link to more detailed information.

The TouchBasePro system is a website based system where you can create and send your own email and SMS marketing campaigns. No relying on 3rd parties to edit this or change that, you can do it yourself and make sure that all important email is delivered to everyone on time.

Getting started with TouchBasePro:

- Register your free account at www.touchbasepro.com.
- The free Business Starter Package, providing you with 5 500 emails per month, is free and will be automatically loaded to your account. If you send more than this per month, don't hesitate to contact us for more info on the package that best suits your needs.

When you have created your account, simply do a once off upload of your databases to your secure account, edit your template design in Word, then let our systems take care of the sending and reporting the results back to you.

The sending is done using our servers which are white listed and constantly monitored by experts to maximise your delivery rates. The system will automatically manage your database - unsubscribing recipients that wish to remove themselves and adding those who subscribe, so it's less work for you.

TouchBasePro is a very user friendly system with plenty of special features and powerful reports to ensure your email marketing is effective. Should you need help with anything, our dedicated Support Team is standing by ready to make it happen for you.

Our system is designed in such a way that you probably won't need us to show you how to use it, but this can be arranged if necessary. If you get stuck, contact us and we will walk you through anything within the system. By your second campaign, it shouldn't take more than 5 minutes so set up and deliver an email.

How do I upload my Database?

To upload your database, make sure that it is saved in an Excel or CSV format. You may [not use purchased databases](#).

On the home page of your account, follow **Step 1** and upload your Email or SMS database. When creating a database, be sure to name it something that you will easily remember. Also remember that your recipients are able to see the name of the database that they are loaded to, so make the name relevant.

The next option is your upload method. To upload an Excel / CSV file, tick the “**upload**” box, or to manually type in a list (only advised for less than 10 addresses), tick the “**type in**” box, then select “**next**”.

For the Upload option, once you have selected your database from your computer and uploaded it, you will be asked which columns you would like to use and what you would like to label them. If you do not want to include a column, be sure to select “**Do not use this column**” from the dropdown menu. By default, we give you two options: **Name** and **Email address**. If the option that you need is not listed, click “**Import this data**” to create a new field and label the column in the text box. You can then pull this info into custom fields within your emails.

The next step will notify you that your database upload has been queued. If your database is very large, you may need to wait a few minutes before receiving the **database upload complete** confirmation email. When you receive this email, click on the link in the email. If it's a small database click the **refresh** button on the page a minute or 2 after the upload begins.

If there were any errors in your database (such as a double @ sign, a missing .co.za or a missing email address) you will now be prompted to correct them. Correct these email address and click “**Save these changes and next**”. If you would prefer removing these addresses from your database, click “**Skip**”. To ignore all errors at once, just click on “**ignore all rows**”.

We also have this step by step [Video](#) on how to upload your database.

To add a Subscribe Form to your website that will allow people to be added to your TouchBasePro database automatically, [click here to find out more](#).

This second video will explain everything on how to [manage your databases](#).

Sending your campaign

Designing your emails

Firstly you need to have an email template created (unless you use the Easy Online Editor). If you need help with [designing in Microsoft Word](#) or [designing in HTML](#), please click the relevant link. We also have a number of [free email templates](#) for you to choose from. If you are unsure as to which email format you should use, [click here to find out the options](#).

When designing in MS Word, remember to work within tables (especially if you are working with images as well as text) and always [compress your images to 96ppi](#) before you upload your Word email template to your account. This will result in a higher quality email with a low file size as well as low [Spam score](#).

If your email only consists of text, we advise that you insert the text into a single cell table so as to hold the formatting and prevent the text from stretching across the entire reading pane.

It is advised [not to have your entire email as a single jpeg image](#) as this will result in a high [spam score](#).

Did you know that you can also personalize your emails by [inserting Custom Fields](#)?

If you do not want to use the automatically generated TouchBasePro footer with Unsubscribe, Subscribe, Send to a Friend and Update you details links you can [add your own links](#). For a more detailed explanation please ask us to send you the document detailing how to do this. Click here to find out [why are these links so important?](#)

If you upload your campaign and find it to be too large, [click here](#) to find out how to reduce its size.

NB: When creating a campaign, by default images will not be embedded within your email campaign and will be hosted separately. Embedding images will increase your email file-size and result in a slightly higher delivery cost.

For more info regarding the advantages or disadvantages of embedding images, please contact us at support@touchbasepro.com.

Uploading your campaign: Steps 1 & 2

To create a new email campaign, follow Step 3 and select either Email or SMS campaign depending on which one you would like to create. You will then be prompted to insert your email's From Name, From Address and Subject line. You may also click on the "**switch to advanced mode**" button for more campaign options.

You will now be asked to choose from these [4 methods of uploading your email](#).

1. **The Easy Online Editor** allows you to use one of the many free templates that we have on offer and insert your copy, images and logo where you would like them to be positioned. We advise that you rather design your emails in Microsoft Word or HTML.
2. The second option is to **upload a Word document** which the TouchBasePro system will automatically convert into HTML. If you are using images and different formatting techniques, you will need to put everything inside a table to prevent it from losing its format. **Never insert text in Text Boxes.**
3. The third option allows you to **upload an HTML document** and images in a ZIP folder. This is used if you have someone creating an HTML email template for you and they send you the entire file including images.
4. The fourth option is used if you have your email stored as a webpage on your site and want to **upload it from a URL**.

After this you will be prompted to select which links you would like to add to the bottom of your email – even if you have manually inserted these links. You will need to at least tick “**Unsubscribe**” box, unless the links have already been manually inserted.

We highly recommend allowing the system to automatically generate a [plain text](#) version of your email as this will also reduce your spam score. The plain text version is what some people will see if their email program can’t “read” your email properly.

Step 3

Test your campaign – it’s **VERY** important to do so because it allows you to see if there are any errors in your email. If you did not receive your test, [this could be the reason](#). It is also a very good idea to check your [spam score](#) by clicking the “**Spam Test**” button. The higher your score, the fewer people are likely to receive your email, but don’t worry reasons are provided as to how you received that score, a score of under 2.5 out of 5 is considered good.

Please note: If you have [Custom Fields](#) in your campaign, they won’t work on **Step 3** so rather send yourself a test from **Step 6**. This is because you haven’t selected your database yet.

Steps 4 & 5

In this step you will be able to select your databases and database segments or manually type in the database you would like to send your campaign to.

Step 5 will allow you to choose the future date and time that you would like your email to be delivered. At the bottom of this step you can also turn the delivery notification emails off as well as select the email address these notifications should go to.

Step 6

This is the last and most important step where you check that all your campaign information is correct and that it is going to the right database etc. You may edit any of the campaign info from this step of the process. This is also the step where you may [attach files](#) to your email.

If you inserted Custom Fields into your email, you need to send yourself a test of the email campaign from this step. Do this by choosing an address from the dropdown menu, you will be sending yourself a copy of the email that this particular address will receive.

If everything is in order, click the “**Send and approve for delivery**” button. Don’t be alarmed if it says that it needs to go for a [Campaign Review](#), as this measure is simply there to allow us to check your campaign and make sure everything is fine. We will let you know if there appears to be any errors with your campaign.

Other details about your account

The My Account section

This section of your account will allow you to [check your email and SMS credit balance](#) and [change any of the information about your company](#), as well as turn all [Notification Emails](#) on and off. You can also purchase pre-paid credits using your credit card. Alternatively contact us and we can arrange an invoice to be sent to you for EFT payments.

Why do I need reports?

Reporting data is an invaluable asset and will help you to improve your marketing efforts enabling your business to grow faster.

The reporting data will help guide better product or marketing decisions by means of:

- Your marketing ROI – where you should spend more or cut back on funding.
- Recipient information– this will identify your best customers and provide a starting platform to up/cross sell to them.
 - Who reads your emails?
 - Who are your VIP recipients (people who always open, read, forward or click links in your emails)?
 - Who is interested in which products advertised in your emails,
 - Which articles or links are more popular than others,
 - Which part of the country your clients are based in,
 - Recipient behaviour from click through in your email to their path through your website,
 - Which email template designs provide the best results?
- How many of your email addresses are valid?
- What time of the day, day of the week or month your recipients prefer reading your emails?

For those who send email and SMS campaigns on behalf of their clients, TouchBasePro allows you to publish these reports on custom stylised pages. This means you don't need to pull each report to send it to your clients, you simply send them the secure URL and report login details and they can access the report at their leisure. Learn more about [Published White Labelled Reporting](#) from here.

FAQ's

I have a small database, how can I grow it?

A newsletter subscriber form is already available in your account, you just need to [add it to your website](#). Anyone who wants to [subscribe](#) can do this themselves and will automatically be added.

You should also use the Viral Campaign links to incentivise your recipients to [forward your emails](#) to their friends and family.

Can I buy databases?

No, this is an extremely bad idea and will land you in a bunch of trouble. Rather start with your own lists of clients and grow your database from there.

I don't have an email template, can you help?

Yes we can. We have a number of free templates available in your account. You can download these as a Word document (or HTML if you know what you're doing) and customise them with your own colours, images, formatting etc. We can also build a custom template design for you.

If someone replies to my campaign wanting to be removed, how do I do that?

You can ask them to click the **unsubscribe** link in your campaign or you may [remove them manually](#). To ensure that you don't accidentally send an email to this address in future, we advise adding them to your [Suppression List](#).

How can I separate databases and campaigns I send on my clients behalf?

If you send emails on behalf of your client we suggest creating a new [Sub-Account](#) for each of your clients in your account. This will allow you to separate all info you have sorted for each of your clients so that you don't accidentally send the wrong email to the wrong clients database.

Do you provide Support if I need help?

Support is free for all Paid-For accounts. You can either contact our dedicated Support Team on 011 447 9716 or support@touchbasepro.com. We are more than willing to help you out with any of your queries.

Think Outbox Think TouchBasePro

To trial TouchBasePro for free visit
www.TouchBasePro.com
or contact sales on
+27 11 447 9716

For Quotes, Contracts, package options, template designs requests:
sales@touchbasepro.com

For System Errors, problems when creating campaigns, and uploading databases:
support@touchbasepro.com

For Accounts queries, Invoices, Debt Orders, EFT and Credit Card payment:
accounts@touchbasepro.com



TouchBasePro

The simplest message distribution service