GETTING STARTED GUIDE

Understanding The Basics Of Using Pinpointe

In 15 Minutes or Less

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CONGRATULATIONS...

We're glad you've decided to choose Pinpointe, On-Demand, Inc. for your email marketing needs.

At your fingertips is the unprecedented ability to create, manage and automate samll to large-scale email marketing campaigns, mailing lists, and automatic responses.

Sending your first email campaign is a simple task but requires some initial setup before you can begin. By following a few simple steps, you'll be on your way to sending your first email campaign.

If you happen to get stuck along the way you can always reach out to our super, awesome support team or get some self-help through Pinpointe's online Support Center with Knowledgebase.

GET HELP/SUPPORT

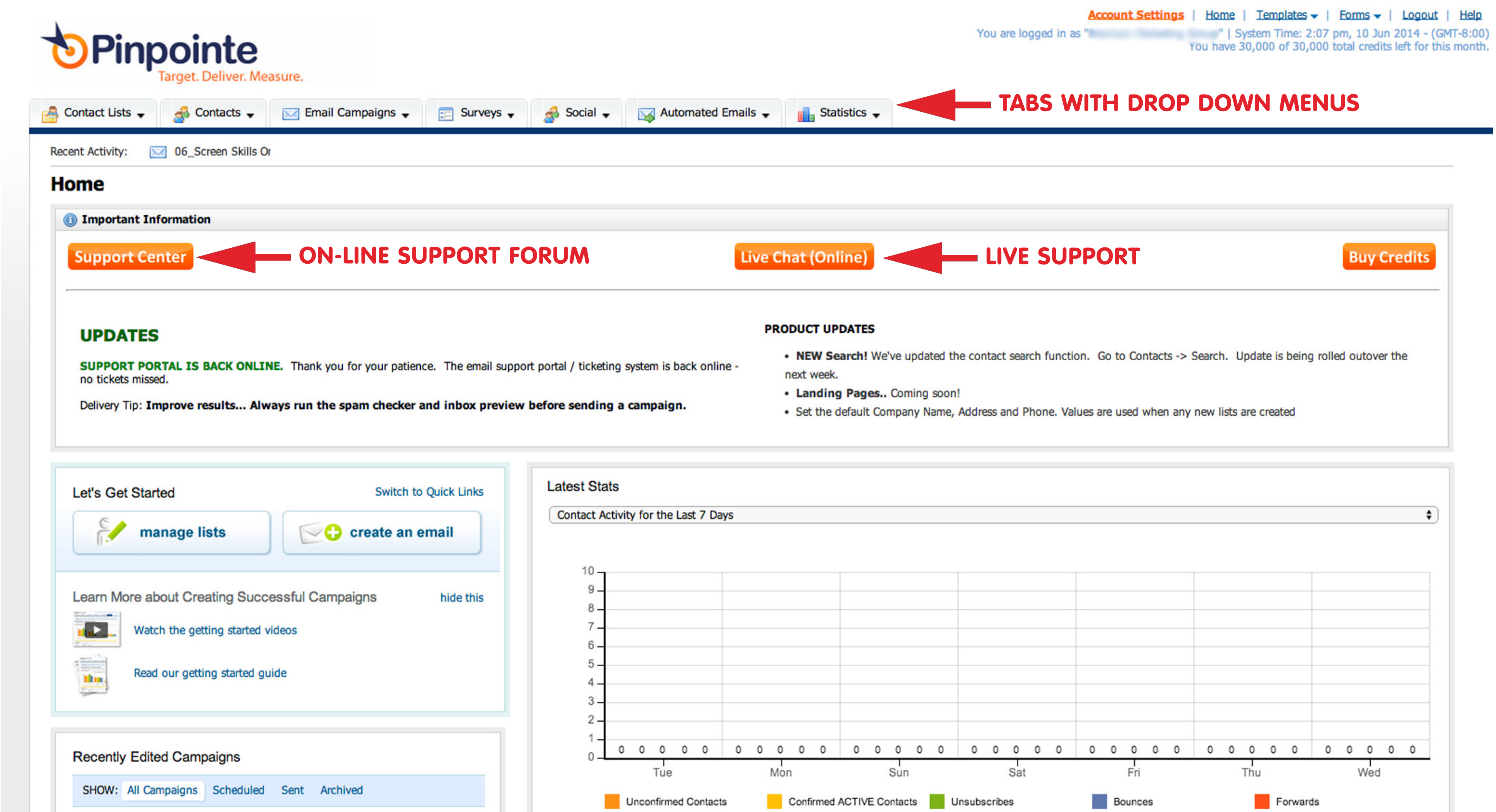
Pinpointe provides you multiple ways to get support 24 hours a day, 7 days a week. You choose the way you'd like to connect with us to get your issue resolved quickly and efficiently.

Support Options Include:

- **Email:** support@pinpointe.com
- **Live Chat:** *Available from 9:00 AM - 5:00 PM EST, M - F*
- **Phone:** 1-408-834-7577 | Option 5 - *Available from 9:00 AM - 5:00 PM EST, M - F*
- **Online Support Center with Knowledgebase:** *Available 24/7* within your Pinpointe account

GET TO KNOW THE PLATFORM

We recommend you spend a little time perusing the Pinpointe platform to get familiar with the different tabs and drop down menus. There is a lot of functionality just waiting to be used...



CONTACT LISTS AND SEGMENTS

If you do not read anything else in this guide but this section...you WILL save yourself a ton of time!

Lists Vs. Segments

Lists

Each list you load into Pinpointe is a separate database. What this means…

If *jane@company.com* is a contact in three of the lists you have loaded into Pinpointe, she accounts for three separate contacts. Now, let's say you send an email campaign to one of the lists that *jane@company.com* is on and she unsubscribes. *Guess what? jane@company.com* is still subscribed to those two other lists and may get a little irritated if she receives another marketing email from your company. You can save the hassle of manually unsubscribing *jane@company.com* from those other two lists by using segments, but first you rneed to create a master (main) contact list.

Create a Contact List:

Click **Contact Lists** tab > **Create a Contact List** > Fill out list details > Click **Save** button

** Note: Your administrator may have already created a contact list for you. To check to see if a contact list already exists, click **Contact Lists** tab > **View Contact Lists**.*

Segments

Segments are like 'saved searches' — or flexible dynamic lists — and can be changed any time. You can define your 'segment' (or 'audience') based on demographics — custom fields you upload — and/or behavioral info like opens and clicks.

Pinpointe highly recommends working from a master list and segmenting it into small lists, rather than uploading multiple lists. You'll be able to better target audiences by pulling out portions of your list and sending targeted emails to specific segments, and you'll also be able to manage your lists more effectively.

IMPORTANT! READ THIS SECTION!

Create a Segment:

Click **Contacts Lists** tab > **View Segments** > Click **Create a Segment** button > Type in a **Segment Name** > Choose the list to segment your contacts from > Choose your **Segment Rules** > Click **Save** button

CREATE A CUSTOM FIELD

If you want to collect and store specific types of information about your contacts, you can create custom fields to hold that information.

Create a Custom Field:

Click **Contact Lists** tab > **View Custom Fields** > Click **Create a Custom Field** button > Follow the next steps > Click **Save** button

ADD/IMPORT CONTACTS

There are 3 ways to import your contacts into Pinpointe.

1) Import Contacts From a File:

Click **Contacts** tab > **Import Contacts From A File** > Select your list and click **Next** button > Click **Save** button > Choose your format under **Import Details** > Click the box next to **Yes, this file contains headers** (if applicable) > Click **Choose File** button > Select your list > Click **Next** button > Map your fields > Put your initials in the specified box > Click **Start Importing** button

** Note: The file format must be CSV, not Excel (XLS). The easiest way to create a suitable CSV file is to edit or create your contact list in Excel and then perform a 'Save As' and select 'CSV' as the file format.*

2) Import Contacts Manually:

Click **Contacts** tab > **Add Contact** > Select your list and click **Next** button > Fill out data fields > Click **Save** button

3) Import Contacts From a Website Form

Click **Website Forms** link (located in top right-hand corner of the system) > **Create a Website Form** > Choose the **Subscription** option from the **Choose a Form Type** drop down > Name your form > Follow the wizard through the next steps > Click **Save** button > Copy the **Website Form HTML Code** and send it to your website administrator to create a subscription form on your website

CONFIGURE SOCIAL ACCOUNTS

Configuring your social network information so you can include "follow" and "share" links in your email campaigns is simple in Pinpointe.

Configure Your Social Network Information:

Click **Social** tab > **Configure Social Accounts** > Read the directions on the page and fill out your information > Click **Save** button

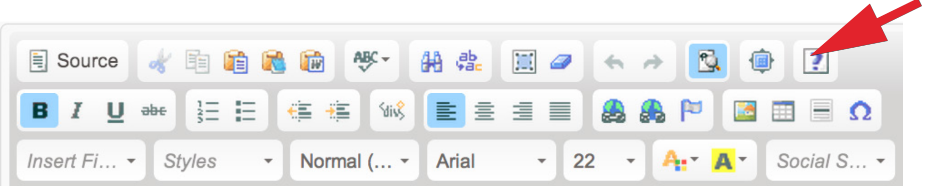
CREATE AN EMAIL CAMPAIGN

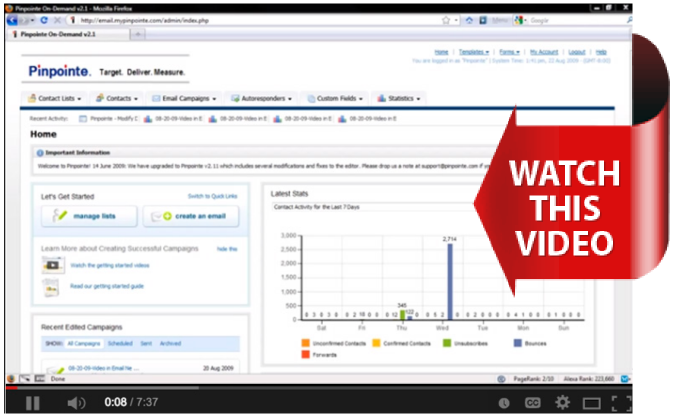
Pinpointe allows you create email campaigns in various ways depending on how you work. While Pinpointe lets you create and edit emails and email templates using the built in powerful WYSIWYG (What You See Is What You Get) editor, you can also create campaigns outside of Pinpointe using a HTML editor. You can then upload your HTML file directly into Pinpointe's design editor.

View the Editor Quick Reference Guide:

Click the **Help** icon

HELP ICON





VIDEO: CREATE EMAIL CAMPAIGN

>> Click to Watch

Create An Email From a Pinpointe Predesigned Template:

Click **Email Campaigns** tab > **Create An Email Campaign** > Enter a new **Email Campaign Name** > Select the type of campaign you want to create (HTML-only, text-only or multipart - HTML and text) > Click **Next >>** button > Select a template from the **Predesigned Templates** list

Once the template opens, type in a subject line for your email campaign and ensure **Create content using the WYSIWYG editor below** is selected. Then you can start editing the template with Pinpointe's WYSIWYG design editor.

Create An Email From Scratch:

Click **Email Campaigns** tab > **Create An Email Campaign** > Enter a new **Email Campaign Name** > Select the type of campaign you want to create (HTML-only, text-only or multipart - HTML and text) > Click **Next >>** button > Click **Start New** or **Import**

Once the next page opens, type in a subject line for your email campaign and ensure **Create content using the WYSIWYG editor below** is selected. Then you can start creating your template with Pinpointe's WYSIWYG design editor.

Create An Email From a HTML File:

Click **Email Campaigns** tab > **Create An Email Campaign** > Enter a new **Email Campaign Name** > Select the type of campaign you want to create (HTML-only, text-only or multipart - HTML and text) > Click **Next >>** button > Click **Start New** or **Import**

Once the next page opens, type in a subject line for your email campaign and either choose **Upload a file from my computer** or **Import a file from a web site**

EDITING CAMPAIGNS WITH PINPOINTE'S DESIGN EDITOR

Pinpointe uses a WYSIWYG editor. WYSIWYG stands for "What You See Is What You Get." Pinpointe's WYSIWYG editor is like working with Microsoft Word except you have to think about setting everything up in tables. It features a number of function buttons that allow you to easily import and format text, change colors, create tables, add graphics from your graphics library, and directly enter trackable, embedded links.

Pinpointe's Design Editor Features:

Copy And Paste Content From Microsoft Word:

Put your cursor where you would like to insert the text > Click the **Paste From Word** icon > Paste your text from Word into the popup box > Click **OK** button

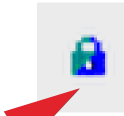
** Note: We recommend you paste your text in as plain text and edit your text in the Pinpointe editor. Instead of clicking the **Paste From Word** icon, click the **Paste as Plain Text** icon.*

PASTE AS PLAIN TEXT ICON

PASTE FROM WORD ICON

Update Image:

Right click the current image > Click **Image Properties** > Click **Browse Server** in popup box > Either upload an image or use an image you have in your image bank > Ensure your **Width** and **Height** proportions fit (the lock image should view as locked so your image is not distorted) > Type in a short description in the **Alternative Text** field > Click **OK** button



LOCK IMAGE DIMENSIONS

Insert Image:

Click where you want to insert your image > Click **Image** icon > Click **Browse Server** in popup box > Either upload an image or use an image you have in your image bank > Ensure your **Width** and **Height** proportions fit (the lock image should view as locked so your image is not distorted) > Type in a short description in the **Alternative Text** field > Click **OK** button

** Note: Always try to use the lowest possible file size for your images, which is what email clients prefer. Images should be no larger than 72 dpi and **NEVER** try to use an image that is over 1MB. Try using png files and reducing the size of them by utilizing a site like www.tinypng.com.*

Insert a Custom Field:

Place your cursor where you would like to insert the field > Click **Insert Fields** > Click on the field you would like to insert

Insert Links:

Highlight the text or image you would like to add a link to > Click on **Link** icon > Under the **Link Info** tab, select **Link Type** > **URL** > Add link in URL field > Click **Target** tab > Select **<popup window>** > Check **Scroll Bar** and any other options you would like to choose > Click **OK** button

** Note: By selecting the <popup window>, the link url will pop up in a different window in the browser, so your campaign is still viewable.*

Add an Anchor:

Highlight the text that you wish to make the anchor > Click **Anchor** icon > Name the anchor (do not use any spaces in the name) > Click **OK** button

Link to an Anchor:

Highlight the text or image you want to link your anchor to > Click on **Link** icon > Under the **Link Info** tab, select **Link Type** > **Link to anchor in the text** > In the **By Anchor Name** drop down, select your anchor > Click **OK** button

ANCHOR ICON

IMAGE ICON

Insert Dynamic Content:

Click the **Dynamic Content** button (located underneath the design editor window) > Choose an item from the drop down menu

Add Social Sharing Links:

Place your cursor where you would like to insert your social share icons > Click on **Social Share** tab (you should have already configured your social accounts) > Make your choice from the drop down menu

RUN A SPAM CHECK

Campaigns that have a SPAM score rating above 5 within Pinpointe's SPAM checker are likely to see 5% — 10% of their emails result in a 'Blocked Due to Content' email bounce status. Pinpointe's integrated SPAM checking and scoring feature runs your message through a Spamassasin engine and calculates an email SPAM score based on several factors. Wording, phrases, HTML coding, links and tags are all analyzed to determine the "SPAM index" of your message.

Get a Real-Time SPAM Score And Summary:

While you are in edit mode of your email campaign, scroll down to the **Email Validation** section > Click **Check your email for spam words** button > Read all the information in the popup box > Close popup box > Fix discrepancies > Save your email > Repeat steps until your SPAM score is below a 3.0

COMPLETE AN IN-BOX PREVIEW

Pinpointe's inbox preview feature will save you time and the hassle of having to switch back and forth between multiple email clients. Taking this extra step shows you exactly what your recipients will see, so you can correct issues that might make your email display incorrectly.

Preview Your Campaign In Multiple Clients:

While you are in edit mode of your email campaign, click **Save & Keep Editing** button > scroll down to the **Email Validation** section > Click **Run inbox preview tool** button > Click all of the tabs to get the most information > Close out of **Pinpointe Inbox Preview** > Fix discrepancies > Save your email > Repeat steps if necessary

SEND/SCHEDULE AN EMAIL CAMPAIGN

Send Email Campaign:

Click **Email Campaigns** tab > Click **Send an Email Campaign** > Make selections and click **Next** button > Fill out applicable information > Click **Next** button

Review the information for accuracy and click the **Schedule My Email Campaign** button to send the email campaign to your contacts.

** Note: If you do not want to send your email immediately, you can schedule it for a later time removing the check mark from **Send Your Email Campaign Now?** Once the check mark is removed you will have the option to select a date and time to send out your campaign.*

View Scheduled Email Campaign(s):

Click **Email Campaigns** tab > Click **View Scheduled Email Queue**

When the campaign is complete, the Activity Status will change from **Sending In...** to **Complete**.

CONGRATULATIONS! YOU'VE JUST SENT YOUR FIRST EMAIL CAMPAIGN!