

# ListManager 10.0 User Guide

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# Welcome to ListManager

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ListManager is a three-tier Internet application designed to deliver email quickly and efficiently to large numbers of recipients. It has its own SMTP engine, web server and DNS resolver. It uses your SQL database to store demographic and behavioral information for the member email addresses.

## What's New in ListManager 10

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### Major New Features

#### Mail Streams

The ability to group multiple IP addresses together to send out a mailing in parallel. This will result in an increased sending speed along with a safeguard if one IP is blocked by a domain, other IPs can continue to be used. MailStreams can be assigned at the site, list, mailing, and segment levels.

#### Mail Stream Optimization

The ability to easily associate a mailstream with a segment to allow for protection of high priority IP addresses. You can now vet newly acquired email addresses on different IPs than your mailings to high value recipients to help ensure high ROI to those members.

#### Smart Bounce Processing

There is now a deeper analysis of the SMTP response codes, so that invalid users are now placed on hold immediately for instance to alleviate aggravation to ISPs. We have included 9 new bounce categories to give you more information. For instance a new change is that a content block will no longer put a user on hold.

#### Dynamic Block Reaction

The system dynamically adjusts connection limitation properties in real-time based on response codes from the ISP. It will also track the historical connection behavior for optimal number of connections for each ISP.

### Minor Features and Changes

- **Improved Feedback loops:** Added Hotmail feedback loop support, now tracks by member id and which mailing they complained about.
- **Detects and avoids ISP firewall blocks:** System realizes it won't make progress and stops attempting mailings.
- **Security:** True login sessions that can timeout.
- **New DB library (OLEdb):** More tolerant of network issues, can be configured for automatic database fail-over, and allows for larger data sizes.
- Removed 200 connection limit for incoming emails
- Revamped Complaint handling

- Updated FCK editor for support of Safari and Opera
- Removed support for Postgres & Solaris

# Overview

## General Features

---

### The ListManager Web Interface

- \* Everything you can do with **ListManager**, you can do with your web browser using its extensive World-Wide-Web interface.
- \* You can read, contribute, search, join and leave using the web.
- \* Members can choose to receive messages by email, or read them on the web.

### Security

- \* All administrative functions are password protected.
- \* Different security roles (list admin, site admin, and server admin) allow you to delegate rights and responsibilities.
- \* Members can password-protect their accounts, or not, if they wish.

### Speed

- \* A fast built-in mail engine can deliver mail extremely quickly.
- \* Modern, C++ based multi-threaded design was built with performance as the top priority.

### Automatic email error detection

- \* Built in mailer provides unprecedented error detection.
- \* Every outgoing message is uniquely tagged, allowing very accurate, automated processing of bad email addresses.
- \* All email errors are processed automatically by ListManager.
- \* Members and administrators are completely protected from "error mail."

### Ease

- \* Web interface makes learning and using ListManager easy.
- \* Automated, wizard-based installation.
- \* Fully documented and supported.

### Programmability

- \* Java and Tcl API and Toolkits provided free
- \* Programmer's Toolkit provided free.
- \* Online Programmer's Manual provided free.
- \* Source code to Web interface provided and can be customized to suit your needs.
- \* Secure TCP/IP communications protocol facilitates programming from any language, any platform.
- \* C/C++ API and documentation provided free.

### Database access

- \* SQL Server makes importing and exporting of data easy. For example, easily import lists of email addresses.
- \* Complete documentation of database tables and fields.

\* Data in SQL Server can be queried at any time and may be modified directly, if done carefully.

### **Personalize Messages**

- \* Mail merge member information into your message.
- \* Conditional text and extended mail merge make your messages fully customizable (ListManager Pro or Enterprise only).
- \* Tcl scripting allows advanced customization of messages (ListManager Pro or Enterprise only).

### **Targeted Mailings**

- \*Target your message to subsets of your larger list (ListManager Pro or Enterprise only).
- \*Purge recipients of earlier messages. Test your message on a part of your list, then send to the entire list—minus your test recipients.

### **Tracking**

- \*Track clickthroughs, opens, clickstreams, and HTML capability.

### **Referrals**

- \*Help your members invite their friends to join your list.

### **Multiple sites**

- \* Supports "virtual hosts" so that many organizations can share one ListManager server, but each appears to outsiders as separate, dedicated servers.
- \* Security roles and partitioning allow each site to operate independently.

### **Archives and searching**

- \* Every message to a mailing list may be saved to the mailing list archives.
- \* Fast text searching of archives (full text indices are automatically built).

### **Compatibility**

- \* Web interface works with commonly used web browsers.
- \* Supports all major email command syntaxes (e.g.: subscribing and unsubscribing) so that your users do not have to learn new commands.
- \* Accepts list server email at all the major email addresses.

### **International**

- \* Supports mailing lists using International characters.

### **Scalable**

- \* Multithreaded architecture scales well on more powerful computers.
- \* Speed can be increased by separating SQL Server and client ListManager processes onto different computers.
- \* ListManager Web Interface can be run on a separate Web Server.

# Supported Platforms and Database Servers

---

With the exception of MSDE (Windows), Lyris ListManager connects to and uses your database. Lyris Technologies does not provide technical support for installation, use or maintenance of MS SQL, or Oracle. Contact your database vendor for more information about support for these databases.

ListManager has been tested using 32 bit machines.

## Windows

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Windows 2000/XP/2003 Standard Server

**NOTE** Windows 2003 Server Web edition is not supported for Microsoft SQL server, as Microsoft SQL Client Tools cannot be installed on this platform.

### Database Servers

- MSDE (Included with ListManager)
- Microsoft SQL Server 2000 SP4 or 2005
- Oracle 9iR2, 10gR1 and 10gR2. (using 32 bit client toolset)

## Linux

---

- Red Hat Linux ES, AS, and WS versions 3.0 and 4.0

**NOTE** If you are installing AS 4, you need to also install the following:

```
# rpm -Uvh compat-libstdc++-33-3.2.3-47.3.i386.rpm
```

### NOTES

- Fedora core is not supported.
- ListManager can use up to 31 IP addresses.

### Database Servers

- Oracle 9iR2, 10gR1 and 10gR2. (using 32 bit client toolset)

## Web Browsers

---

- Internet Explorer 6 Service Pack 2 and Internet Explorer 7
- Firefox 2

**Note** Macromedia Flash Player required for the Report Dashboard

The following web browsers are not officially supported, but should work:

- Netscape 8.1
- Safari

**Notes**

- The [HTML Editor](#) does not work for Netscape 8.1 or Safari.
- Javascript is not supported in the HTML Editor.

## System and Network Requirements

---

### Minimum Requirements

- \* Computer that is always on
- \* Web browser
- \* Full-time, dedicated Internet connection (1.544 Mbps minimum)
- \* Static IP address, and forward and reverse DNS.
- \* Microsoft SQL only: 5 user license for Microsoft SQL Server

### Memory and Bandwidth Recommendations

The requirements below are general guidelines, but your needs may vary depending on other factors. For example, if you are sharing your bandwidth with other applications, you may need more bandwidth than is recommended below for your license. If your system is low on resources or if you're seeing performance problems, adding additional RAM, CPU speed and hard drive speed may alleviate these problems.

The recommendations below are based on the Intel architecture. Customers using non-Intel architecture should choose components that match these recommendations for their architecture.

### Bandwidth

License	Bandwidth
Platinum or less 10,000 msgs/hr	1.5 Mbps (T1)
Platinum Plus 100,000 msgs/hr	10 Mbps (7 T1s)
Diamond 200,000 msgs/hr	20 Mbps (1/2 T3)
Extreme 300,000+ msgs/hr	44.7 Mbps (T3)

### Minimum System Recommendations

System Requirements	ListManager/SQL Database on Same Machine	ListManager/SQL Database Server on separate machines	
		ListManager Server	SQL Database Server
RAM	1.5 GB	512 MB	1.5 GB
Hard Drive Space	10 GB	1.5 GB	10 GB

Available	Single IDE	Single IDE	Single IDE
Hard Drive Configuration	Single 2.0 Ghz Processor	Single 2.0 Ghz Processor	Single 2.0 Ghz Processor

### Average System Recommendations

<b>System Requirements</b>	<b>ListManager/SQL Database on Same Machine</b>	<b>ListManager/SQL Database Server on separate machines</b>	<b>ListManager/SQL Database Server</b>
RAM	2 GB	512 MB	2 GB
Hard Drive Space Available	20 GB	1.5 GB	20 GB
Hard Drive Configuration	3 or more ATA or SCSI drives under a RAID controller	Single IDE	3 or more ATA or SCSI drives under a RAID controller
Processor	Single 2.0 Ghz Processor	Single 2.0 Ghz Processor	Single 2.0 or multiple 2.0 Ghz Processors

---

### High End System Recommendations

<b>System Requirements</b>	<b>ListManager/SQL Database on Same Machine- Not Recommended</b>	<b>ListManager/SQL Database Server on separate machines</b>	<b>ListManager/SQL Database Server</b>
RAM		2 GB	4+ GB
Hard Drive Space Available		1.5 GB	40 GB or greater, depending on membership



Hard Drive Configuration	Single IDE	p size and archives kept 3 or more SCSI drives under a RAID controller
Processor	Single 2.5 Ghz	Single 2.5 or multiple 2.0 Ghz processors
Other		100 Mb or 1 Gb Ethernet card  Tape Backup

## Logging In and Logging Out

---

In order to access the ListManager administrator interface, you'll need to open a web browser and point it to your ListManager URL.

If you're wondering if you have the right URL, it will look something like this:

```
http://domain.example.com/
```

This URL will take you to a screen that asks you log in with your email address and password. Once you have done so, you will be taken to the homepage of your list.

When you log into ListManager, you'll be asked for email address or name and password. Please use your email address to log in, as it will be faster. List Administrators *must* use their email address. You'll be taken to the [Homepage](#) for the last list you've worked on.

You are always logged into a single list. If you have more than one list, and you'd like to change to that list, click on the list name in the upper right hand corner of the screen. You will be taken to a menu that will allow you to select another list.

We recommend that each administrator have an individual login, because ListManager remembers the settings for each administrator.

### Forgotten Password

If you fail to log in to the administrator's interface, you will be prompted to click a link to have a message emailed to you that will allow you to set a new password. Note that this functionality is for administrators only; if you are not an administrator, you may have your password emailed to you if you fail to log into the [discussion forum interface](#).

## Logging Out

If you'd like to log out, click on your name next to **Login**. You'll find it in the upper right corner of your screen no matter where you are in the ListManager web interface. The next screen will give you the option of logging out, changing your login, or changing your list. Click on **Log Out** to log out of ListManager.

For security reasons, we recommend that you close all browser windows after logging out of ListManager.

## Changing Your Login

If you'd like to log in as a different user, you may either Log Out and Log In again, or **Change Login**. Both options are available if you click on your name next to Logged In, located in the upper right hand corner of every ListManager web interface screen.

## Changing Your List

Whenever you are logged into ListManager, you are logged into a particular list. If no lists are on the server, you must create one before you can proceed.

If you'd like to change the list you're working on, click on the list name next to List, located in the upper right hand corner of every ListManager screen. You'll be given the lists which are available to you. Or, you may click on your name next to Login, located in the upper right hand corner of your screen. The next screen will give you the option to change the list you're working on.

# Announcement Lists

---

**Fast mailing:** Optimized multi-threaded mail sending supports hundreds of simultaneous mail send sessions with very low RAM usage.

**Automatic error processing:** Email addresses will be automatically processed and bad addresses are flagged in the database. You can audit the corrected email address list as well.

**Highly configurable:** You can define exactly who the "From:", "Reply-To:" and SMTP "From " are for every message.

**Personalized Messages:** Mail-merge information about recipients directly into your message to personalize the message. Use conditional content to create entirely different messages depending on criteria you choose.

**Segmenting:** Create subsets to send to a part of your list, based on criteria you choose.

**Tracking:** Track member response to your mailings by tracking clickthroughs, opens, and clickstreams.

**Referrals:** Help your members invite others to join your list.

**Auditing:** Every mail transaction is fully logged. You can obtain positive confirmation of mail delivery (or failure) as well as the time delivered, number of retries, or error message obtained for a given email address.

**Database links:** Easily import databases of email addresses and export ListManager information to your database.

**Subscriptions:** Membership can automatically "expire" after a specified period of time.

**Insider Posting:** You can assign a number of people to have permission to post to a group.

## Discussion Lists

---

**Web interface:** Makes it easy for people to subscribe, leave and change their settings. Can also search, read and contribute from the web.

**Fast text searching:** All archives may be indexed for fast searching.

**Confirmation:** New subscriptions can send a "are you sure you want to join" message to confirm their email address and to ensure someone else did not subscribe that person as a prank.

**Compatible:** Accepts most list server commands.

**Protected membership:** Mailing lists can be set up so that new members must be a) approved by an administrator b) must know the new member password c) can join without approval d) cannot join, the administrator must add them.

**Visitors:** Mailing lists can allow visitors to read and search the archives on the web, but they cannot contribute to the group.

**Multi-lingual:** Supports mailing lists in a number of languages

**Easy upgrade from other programs:** Imports your current member list and mailing list archives for an easy transition.

**Spam protection:** Number-moderating feature virtually eliminates spam. By requiring new members to have their first message approved, you can keep spammers from joining your list just to spam it.

**Moderating:** Supports several moderating models. All members can be moderated, selected members can be moderated, and selected members can be unmoderated (while everyone else still is).

**Number moderating:** An option for new members to have their first few messages approved, thereafter they can contribute unmoderated.

**Web based moderating:** You can approve or reject messages using the web interface.

**Date moderating:** Can have moderated messages be automatically approved after a given time period.

## **What Different Administrative Roles Are There?**

---

ListManager allows full delegation of rights and responsibilities to others, so that administrators only see and have control over what is appropriate for them to control.

Each of these roles can be assigned to multiple people and each person can have multiple roles. All roles are protected by a username / password combination and all administrative roles are required to have a password. If additional member security is desired, members can be required to define a password.

In addition to these standard administrative roles, [granular permissions](#) may be used if access to particular portions of the administrative interface is necessary,

The principle administrative roles are:

### **Server Administrators**

The server administrator controls how the entire server runs. The server administrator can create sites, and has control over things that affect all the sites on their server, such as database configuration, network settings and scheduled tasks. A server administrator can access all Site and List administration menus.

### **Site Administrators**

A site administrator typically doesn't deal with the day-to-day workings of a mailing list. Instead, the site administrator can create and remove mailing lists, create documents, create auto-responders and other functions that affect the site as a whole. A Site Administrator is also entitled to act as the list administrator of any mailing list in the site.

Site administrators typically are not aware of other sites on the servers, nor are they aware of mailing lists belonging to these other sites.

### **List Administrators**

List administrators are list members with enhanced administrative powers, and do most of the day-to-day administration of lists. They can add and remove members, send messages, approve moderated messages, and other things which concern regular mailing list maintenance. They may also change the list settings.

### **Non-Administrative Roles**

Users who are not administrators may also have access to ListManager.

### **Members**

Members are email addresses of people on a mailing list. A mailing list member has no administrative powers, but may typically change their own settings or unsubscribe. Depending on the list, a member may be able to post messages to the list.

## Visitors

People who are not members may, depending on the list settings, view and search list message archives in the discussion forum interface.

# ListManager Licensing

## Your ListManager Serial Number

---

When you purchase ListManager, your account representative will provide you with your serial number. This serial number may only be used for one server running ListManager at a time. Keep your serial number private! It is your proof of ownership, and it is used to register and activate your ListManager server.

### Updating Your Serial Number

Your serial number will be automatically registered and activated if you provide it when installing or updating ListManager using the installer. If you have already installed ListManager and have been using a temporary serial number or have been running the demo version, you may update your serial code through the web interface. Just log in as a server admin, click on Server Config, fill in your serial number, and save the page. You may also update your serial number by running the following command on the command line:

```
lm serial code
```

Substitute your serial number for *code* above.

### Updating Your Activation Code

When you install ListManager with your serial number, you'll get an activation code immediately. If you upgrade your license, your activation code will be automatically updated within 24 hours. You may activate it immediately by logging in as a server admin, going to Utilities : Administration : Server : Operational Statistics : License Capabilities, and clicking on the Get Activation button.

Or, you can run `getactivation` from the command line:

```
lm getactivation
```

Then restart ListManager (both the backend and the webserver). Your ListManager activation code will be updated after the restart.

### Clearing Your Activation Code

If you need to move ListManager to another machine, or if you need to change the network card on the ListManager server, you'll need to clear your activation code for the server before making the move. To do so, run the `clearactivation` code from the command line:

```
lm clearactivation
```

Once you've cleared your activation code, you'll be able to enter your serial code and update your activation code for your new ListManager server.

## Upgrading and Your Activation Code

---

Upgrading your ListManager license is easy! If you've purchased an upgrade, there's no need to change your serial number. ListManager will automatically update your activation code within 24 hours, and the additional capacity or features of your new license will be available on your server.

In some cases, you may need to edit the [Limit to License Level](#) setting for individual sites after the code has been updated.

If you don't want to wait for your activation code to be automatically updated, you can update it immediately by running the following command:

```
lm getactivation
```

Stop and restart ListManager, and all of the features of your new license will now be available. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) or call 800-768-2929 for more information about the different license levels of ListManager.

## Getting an Activation Code When Behind a Firewall

---

If you are behind a firewall, ListManager may not be able to automatically get an activation code if ports 25 or 80 are not open. You can follow these steps to receive your activation code:

1. Open port 80 or port 25. Port 25 must be open so that ListManager can send and receive mail. You will be able to receive your activation code after opening these ports.
2. If you use a proxy, you may edit the script `getactivation.tcl`, located in the `lm/tcl/scripts` directory, to use that proxy. To do so:

- Open the file `getactivation.tcl` with a plain text editor such as Notepad or Emacs.

- Edit this line of the script to contain your proxy information. Be sure to remove the # sign.

```
# If you have a proxy server, you can specify it here  
# and remove the '#' symbol to use it.
```

```
#http::config -proxyhost yourproxyhostname -proxyport  
yourproxyportnumber
```

What this means is that you should remove the # sign in the third line above, and replace `yourproxyhostname` with your proxy hostname, and `yourproxyportnumber` with your proxy port number. When you're done, it should look something like this:

```
http::config -proxyhost host.example.com -proxyport 1111
```

### Troubleshooting Activation Code Problems

If you are still unable to get an activation code, you may troubleshoot the problem further by editing the script `getactivation.tcl`, located in the `lm/tcl/scripts` directory, to use that proxy. To do so:

1. Open the file `getactivation.tcl` with a plain text editor such as Notepad or Emacs.
2. Edit the file so that it contains the following after the `set url` line:

```
puts $url
```

3. Open a command prompt, and `cd` to the `ListManager` directory.
4. Run the following command:

```
lm getactivation
```

You will see the URL(s) that `ListManager` is attempting to use to get your activation code. You may enter this URL directly into a web browser.

There are some circumstances where you may want to clear the activation code, as in when you are installing `ListManager` on another computer. For this you will have to use the following command:

```
lm clearactivation
```

If you are behind a firewall, and need to edit the proxy information for the `getactivation.tcl` script, you may need to do the same for the `clearactivation.tcl` file as well. The easiest way to do this is to copy the proxy information from the `getactivation.tcl` script to the `clearactivation.tcl` script exactly.

## Moving Your ListManager License

---

Your `ListManager` license is valid for only one server. If you need to move your `ListManager` server (or if you want to change the network card), you'll need to deactivate your current `ListManager` activation code before activating it for your new server.

### To clear your activation code on your old ListManager server

1. Stop `ListManager`.
2. Open a command prompt, change to the `ListManager` directory, and run the following command to clear your activation code:

```
lm clearactivation
```

To get a new activation code on your new ListManager server, you don't need to do anything! Your activation code will be automatically updated within 24 hours. Or, you may activate it immediately by running `getactivation` from the command line.

1. Stop ListManager.
2. Open a command prompt, change to the ListManager directory, and run the following command to get a new activation code:

```
lm getactivation
```

Your ListManager activation code will be updated.

## Disabled License

---

Your ListManager license may limit the number of members, sites, features and databases you may use. You will receive a message telling you that your license has been disabled if you attempt to add more members to your server than your license allows, add too many sites, or otherwise exceed the limits of your license. Contact your sales representative at [sales@lyris.com](mailto:sales@lyris.com) or 800-768-2929 for more information about upgrading your license to accommodate your needs.

Although your license is disabled, members will still be able to join or leave your lists, and tracking events will still be recorded. However, you will not be able to send a posting to your lists.

If the disabled license is for a node in a ListManager cluster, and it is not the primary machine in the cluster (defined as the lowest-sequenced NodeID in the `lyrConfigNodeSettings` table), then the disabled machine will not send mail and will reject all incoming tasks as well (incoming mail, tracking, Discussion Forum Interface access and NNTP).



# Getting Started

## Starting ListManager

---

### To start and log on to ListManager Windows

1. Click **Start**, then **Programs**.
2. Select **Lyris ListManager**.
3. Select **Run ListManager Now**.
4. From the Start menu, select **Run ListManager Web Server Now**.
5. From the Start menu, select **ListManager Web Interface**. Or, open a web browser and go to the ListManager URL directly. For example, if the hostname is "lists.example.com", point your web browser to `http://lists.example.com`.
6. A screen will prompt you for your admin name and password. Enter the name *admin* and password you selected when installing ListManager.

### Unix

1. Log on as root.
2. Change to the ListManager directory. E.g: `/usr/local/lm/bin`.
3. Run `./S96lm start` to start ListManager.
4. Run `./S96httpd-lm start` to start the ListManager Web Server.
5. Open a web browser, and go to the ListManager URL. For example, if the hostname is "lists.example.com", point your web browser to `http://lists.example.com`.
6. A screen will prompt you for your admin name and password. Enter the name *admin* and password you selected when installing ListManager.

### If you are running ListManager for the first time

After you log on for the first time, you must create a list. You will be automatically taken to the Your First List Page when you log into ListManager the first time. You will not be able to proceed if you do not create and save this initial list.

1. Select the **Purpose of List**. Email Marketing and Announcements are one-way lists from the administrator to the list members; Moderated and Unmoderated Discussion lists are two-way conversations among list members.
2. Enter **Test** as the **List Name** and **List Description**. (Note: You will not be able to change the list name later! If you believe you'll want to use this test list in production later, please use a different name).
3. Edit the **Admin Name**, **Admin Email Address** and **Admin Password**.

Note: Each administrator should have a unique login. Shared logins may cause web interface conflicts.

4. Click **Save** to save your list. You will be taken to the [homepage](#) for your new list.

### Entering Your Serial Number (Optional)

If you entered your serial number while installing ListManager, you may skip this step. Without a serial number, ListManager may be disabled or limited to having 200 members.

1. In the left Navigation bar, click **Utilities**, point to **Administration**, then point to **Server**, then point to **Server Settings**, and then click **Machine Settings**.
2. Type your serial number in the **Serial Number** box.
3. Click **Save**.
4. In the left Navigation bar under **Utilities**, click **Administration**, then point to **Server**, then point to **Operational Statistics**, and then click **License Capabilities**.
5. Click Refresh this page, and then verify your license capabilities.

## Starting ListManager from the command line

### Windows

1. Change to the directory where you installed ListManager.

2. Run:

```
lm start
```

or to save the output to a file, run:

```
lm start 1>lm.log  
2>lm2.log
```

This command redirects the standard output and the error log to files in your ListManager directory, which may be examined later.

**NOTE** If you type "lm" with no command line parameters, the available options display and then ListManager exists without running.

### Modifiers to the "start" command

The "start" command can be modified with a number of options. The options can be anywhere on the command line, in any order. The options are:

#### cfgfile

Run ListManager and specify which configuration file to use. By default, ListManager uses lmcfg.txt to connect to the database.

### Unix

1. Change to the directory where you installed ListManager.

2. Run:

```
./lm start
```

or to save the output to a file, run:

```
./lm start 1>lm.log  
2>lm2.log
```

This command redirects the standard output and the error log to files in your ListManager directory, which may be examined later.

You can use an alternate configuration file using the `cfgfile` command-line option. The file to load is specified after the "cfgfile" command-line argument. For example:

```
lm.exe start cfgfile lmcfg_dev.txt
```

The `cfgfile` argument must be a relative path, and can appear anywhere in the command line.

#### **mailtest**

Run ListManager, do not actually deliver any email. It will run completely as normal, but during the SMTP transaction will send a RESET and QUIT command right before it is supposed to send the DATA command. This option can be useful to test the load-capacity and stability of a ListManager installation.

#### **morestats**

Running ListManager in `morestats` mode gives additional information in the Server Statistics page.

#### **nocheck**

Run ListManager, but do not check for any TCP/IP conflicts. When it starts up, it first checks to see if any other programs are using the TCP/IP addresses and ports that ListManager will need to use. ListManager does this by trying to connect to port 25 (SMTP mail) and port 2021 (Tclport) on all TCP/IP addresses of the machine, or just the TCP/IP addresses ListManager has been configured to use, if the "Multiple TCP/IP Addresses" setting has been used. If one of the ports it needs is being used, ListManager will display an error message and not load. If you prefer, you can bypass this test with the `nocheck` option, and it will start a few seconds faster.

#### **noincoming**

Run ListManager but do not run the incoming mail processing service. Incoming mail will not be processed.

#### **noindexer**

Run ListManager, but do not run the full text indexing service. Messages waiting to be full text indexed will not be indexed.

#### **nomapi**

Run ListManager, but disable access to the API.

#### **nomail**

Run ListManager but do not send any mail:

```
lm start nomail
```

#### **nonntpserver**

Run ListManager, but do not run the nntp server which allows Newsgroup access to the mailing lists.

#### **noscheduler**

Run ListManager, but do not run the scheduled task manager. Tasks such as digests will not be run.

#### **noscreen**

Run ListManager with no screen output

**nosmtpserver**

Run ListManager, but do not run the SMTP server which receives mail. No incoming mail will be accepted.

**notclport**

Run ListManager with no TCLPORT service (which runs on port 2021, by default). The web interface will not be able to communicate with the server.

**tclexporttrace**

Run ListManager so it keeps track of the current state of every tclexport thread.

**threadtrack**

When you start ListManager in the foreground with the "threadtrack" option on the command line, it will keep track of the current state of every SMTP mail thread. You can view the instant status of all mail sending threads from the server statistics page, where this additional information is appended. This can be informative and useful in determining what the ListManager SMTP delivery engine is doing.

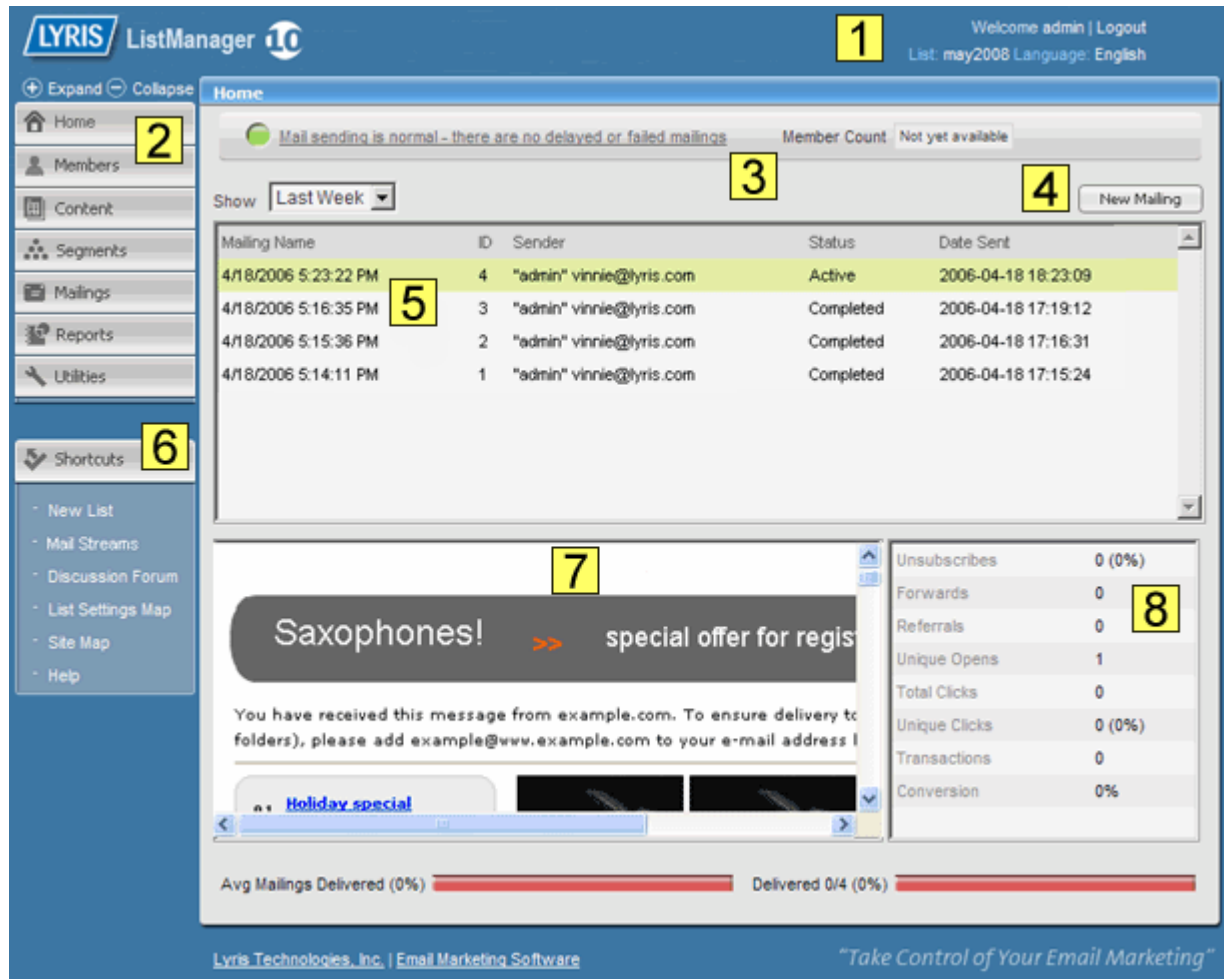
## **Introduction to the Interface**

---

The ListManager Homepage is the first page you see when you log in. It allows you to see at a glance what has been happening recently on the list, and provides shortcuts to frequently performed tasks.

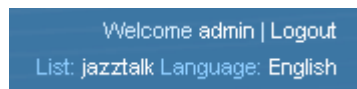
You are always logged into a list, even if you are logged in as a site or server administrator, and the information displayed on the homepage is for the list your are logged into.

The reporting statistics displayed on this page are generated by ListManager once per day, or according to the frequency set by the server administrator.



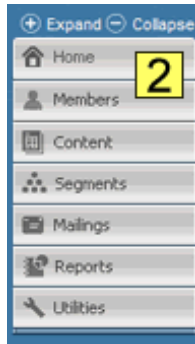
## 1. Login Information

Login information is at the top right of every ListManager screen.



The upper right hand corner shows you your current list, the current language you are using, and who you are logged in as. If you are running a ListManager [cluster](#), the node name will appear as well if you are a server administrator. Click on the list name to change your list, the current language to switch to another language, and your name to log in as another user.

## 2. Navigation Bar Tabs



You can navigate between the major areas of ListManager by clicking on one of the Navigation bar tabs.

#### **Home**

You can always return to the homepage by clicking on the Home tab.

#### **Members**

Members are the email addresses ListManager sends mailings to. From the [Members](#) tab, you may add or import members, find and edit members, or delete them.

#### **Content**

A mailing consists of two parts: the [content](#) of the message, and the segment you'd like to send to. Clicking on the Content tab allows you to view, create, copy or delete content.

#### **Segments**

[Segments](#) are typically subsets or target audiences of a larger list. By creating a segment, you can send messages to a targeted portion of your list. Clicking on the Segments tab allows you to view, create, copy, test or delete segments.

#### **Mailings**

A [mailing](#) combines content and segments to send an email to recipients. Alternatively, you can create one-off mailings without first creating content or segments. Clicking on the Mailings tab allows you to view, create, copy, test, schedule, approve, or delete mailings.

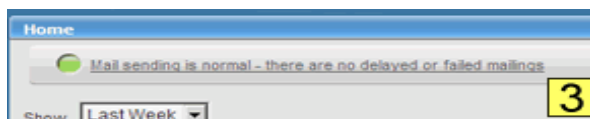
#### **Reports**

Once you've sent out a mailing, you'll want to see its progress and how successful it's been. By clicking on the [Reports](#) tab, you can also view clickthrough statistics, and information about your membership.

#### **Utilities**

Manage your settings and your members by clicking on the [Utilities](#) tab. From the Utilities tab, you can change your [list settings](#), add or edit [members](#), and see the [mail](#) that's coming in and out of your server. You can also set up [autoresponders](#), manage the [server](#), and create [documents](#) to be sent automatically when people confirm or subscribe.

### **3. Mailing Status**



This box displays the current mailing status of the list, and the number of active, normal members.

If there are no problems sending mail, ListManager will display a green icon with a message indicating mail sending is normal.

If a mailing could not be generated as expected (no recipients to send to, or a corrupted message) ListManager will display a red icon.

To clear the warning, click it to be taken to a list of unprocessed incoming mail messages. Scroll down to Status, check the box next to "acknowledged", and click *ok*.

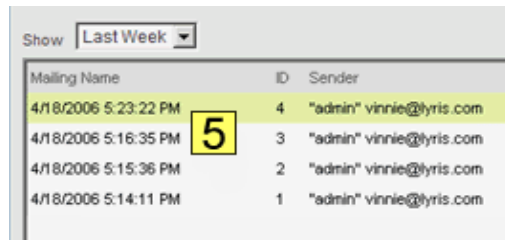
This box displays any system-wide messages from the server administrator. If there are no notices, this box will not appear. The server administrator may enter a message to be displayed here in [Utilities: Administration: Server: Server Settings: Basic Settings: Interface Messages](#). **Note:** This feature is unavailable in Version 9.

#### 4. New Mailing



You can begin creating a new mailing by clicking this button.

#### 5. Recent Mailings

A screenshot of a software interface showing a table of recent mailings. The table has columns for Mailing Name, ID, and Sender. The first row is highlighted in yellow and has a yellow callout box with the number "5" over it.

Mailing Name	ID	Sender
4/18/2006 5:23:22 PM	4	"admin" vinnie@tyris.com
4/18/2006 5:16:35 PM	3	"admin" vinnie@tyris.com
4/18/2006 5:15:36 PM	2	"admin" vinnie@tyris.com
4/18/2006 5:14:11 PM	1	"admin" vinnie@tyris.com

This area displays the recent mailings for the list that is named in the upper right corner of the screen. To display a mailings from a different time period (for example, last week or last month) or a particular campaign, click **Show**, and then choose from the list.

##### **Mailing Name**

The title of the mailing displayed. To view another mailing, select it from the drop-down box and click **REFRESH**.

##### **ID**

A unique identification number assigned to that specific mailing.

##### **Sender**

The name that appears in the message From: field.

##### **Status**

The status of this mailing. The possible statuses are:

Active - Recipients are pending delivery.

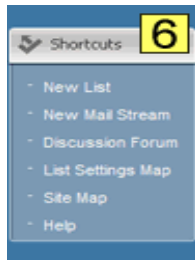
Paused - The mailing has been paused by an administrator.

Completed - Delivery to all recipients is completed.

##### **Date Sent**

The date and time the message was queued to be sent.

#### 6. Shortcuts



This bar displays links to commonly performed tasks. The links available here will vary according to your administrative permissions. For example, the link to create a new list only appears for site and server administrators.

## 7. Preview



Display a preview of the mailing selected in the area above.

## 8. Mailing Statistics

Unsubscribes	0 (0%)
Forwards	0
Referrals	0
Unique Opens	1
Total Clicks	0
Unique Clicks	0 (0%)
Transactions	0
Conversion	0%

All trends indicate whether the percentage or number expressed increased or decreased since the last mailing.

### Unsubscribes

# - The number of unsubscribes attributable to this mailing. ListManager is able to attribute unsubscribes to a particular mailing if the mailing uses the %%email.unsub%% or %%url.unsub%% tags to unsubscribe members. Click this number to be taken to a chart comparing recent unsubscribe counts.

% - The number of unsubscribes as a percentage of the number of successful deliveries.

### Forwards

The number of forwards recorded for this mailing. A forward is a message that has been opened on computers with different IP addresses. Forwards tracking



requires that you have [opens tracking](#) enabled. Click this number to be taken to a chart comparing forwards for recent mailings.

#### Referrals

The number of referrals recorded for this mailing. Referral tracking requires that you have [refer a friend](#) tracking in your mailing. Click this number to be taken to [Reports: Mailings: Referral Statistics](#).

#### Unique Opens

# - The number of unique opens detected for this mailing. [Opens tracking](#) must be enabled for unique opens to be displayed. Click this number to be taken to a chart comparing recent unique open rates.

% - The number of unique opens as a percentage of the number of successful deliveries.

#### Total Clicks

# - The total number of clickthroughs for this mailing on all links. At least one URL must have been a [tracking URL](#) for clickthrough rates to be counted. Click this number to be taken to a chart comparing recent total clickthrough rates.

#### Unique Clicks

# - The number of recipients who have clicked at least one link in the mailing. Click this number to be taken to a chart comparing recent unique clickthrough rates.

% - The number of recipients who have clicked at least one link in the mailing as a percentage of the number of successful deliveries.

#### Transactions

# - The number of purchases recorded for this mailing. [Purchase tracking](#) must be enabled for transactions to be counted. Click this number to be taken to a chart of cumulative purchase over time.

\$ - The amount purchased as a result of this mailing.

#### Conversion

% - The number of recipients who made a purchase as a percentage of the number of successful deliveries.


#### Where Mails Sent

Opens the [Map Report](#), which displays a breakdown of results according to state or province.

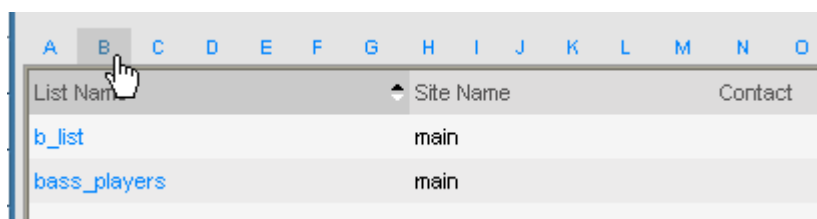
## Table View Options

---

By default, tables in ListManager display ten lines of data at a time. Each table displays a number of icons that change how you see your data, or acts on that row in the table. If

you don't understand what you see on a page, just click the  help icon to access context-sensitive help.

### Alphabetical Filter



List Name	Site Name	Contact
<a href="#">b_list</a>	main	
<a href="#">bass_players</a>	main	

Click a letter to display all list items that start with that letter.

### **Toggle**

Changes the sort order of a table, from a-z to z-a, for example, or from most recent to least recent. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Sort options vary depending on the table.

### **Search**

Search for exact words or phrases in this table, without wildcards. Searches are case-insensitive. Only the visible fields may be searched. For example, if you are searching Members: View Members, you may search for an email address, but not for a demographic field (which is not displayed in this table).

### **CSV Icon**

Downloads the current table in CSV (comma separated values) format. CSV files may be opened and edited with many programs, such as Excel.

Shows the next page of results.

Shows more results for a table, or increases the size of the field. Repeatedly clicking this button shows increasingly more lines.

Shows fewer results for a table, or shrinks the size of the field.

## Getting Started Tutorial

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The ListManager Getting Started tutorial walks you through many of the basic operations of ListManager.

The tutorial can be found here:

[http://www.lyris.com/help/lm\\_help/gettingstarted10/](http://www.lyris.com/help/lm_help/gettingstarted10/)

# HTML Editor Tutorial

## HTML Editor Tutorial: Part 1

---

In this tutorial, you will learn to use some of the basic features of the ListManager HTML Editor.

### To begin

1. Open ListManager.
2. In the left side Navigation bar, click **Mailings**.
3. Click **New Mailing**. The HTML Editor appears under **HMTL message**. When the toolbars in the Editor appear, it is ready to be used.

### Entering Text

1. Click the workspace (white area) in the HTML Editor. You should see a blinking pointer on the first line.
2. Type:

### New! ListManager 10.0 from

and then press ENTER.

### Formatting Text

1. Select the text you just typed.
2. Click the box next to **Font**, and then select **Verdana**.
3. Click below the line of text to position the pointer on the next line.

### Inserting a Graphic

1. Click the Insert/Edit Image button.



2. Click the Browse Server button.

This opens the Image Browser, which acts as a library to store images you may want to use in your messages. You can upload images and create and manage folders to keep things organized. Right now, we're going to get an image from elsewhere.

3. Click the **Close** button to close the Image Browser window.
4. In the **URL** box of the Image Properties dialog, type:

**<http://www.lyris.com/images/logo.gif>**

5. Click **OK**.  
The Lyris logo appears in the HTML Editor.

[Continue to Part 2](#)

## HTML Editor Tutorial: Part 2

---

### Changing the Justification

The pointer should be blinking right next to the Lyris logo.

1. Click the Center Justify button.



The logo moves to the middle of the page

2. Press ENTER to move the pointer to the next line.
3. Click the Left Justify button to move the pointerHosted over to the left margin.



### Creating a Bulleted List

1. Type the lines below, pressing ENTER after you finish each line:

**Hosted Image Library**  
**Content and Template Creation Tools**  
**New and Improved HTML Editor**  
**Enhanced Reporting**

and then press ENTER.

2. Select all four lines, and then click the Insert/Remove Bulleted List button.
3. Click the line underneath **Enhanced Reporting** to position the pointer there.



### Maximizing the Editor Window

As you can see, the Editor window is starting to become crowded. Let's create a larger workspace.

1. Click the Maximize button.



2. Reposition the pointer below the last line of text.

[Continue to Part 3](#)

## HTML Editor Tutorial: Part 3

---

### Changing the Color of Text

1. Type the following:

**This line has red text with a yellow background**

and then press ENTER.

2. Select the line you just typed, and then click the Text Color button.



3. Click the bright red color patch.
4. Click the Background Color button



and then click the bright yellow color patch.

5. Click below the line you just changed to deselect it.

### Inserting a Table

1. Click the Insert/Edit Table button.



2. In the **Table Properties** dialog, choose the following settings:

**Rows:** 8

**Columns:** 4

**Width:** 50 percent

3. Click **OK**.

### Changing Table Properties

1. Right-click the table, and then select **Table Properties**.
2. In the **Caption** box, type:

**This is the Table Caption**

3. Change the **Border Size** to 2.
4. Click **OK**.

[Continue to Part 4](#)

## HTML Editor Tutorial: Part 4

---

### Changing Cell Properties

1. Click the first cell in the table to position the pointer there.
2. Right-click inside the cell, point to **Cell**, and then select **Cell Properties**.
3. Choose the following settings:

**Height:** 40 pixels.

**Background Color:**

Click **Select**, choose a light yellow shade, and then click **OK**.

4. Click **OK** again to close the Cell Properties dialog.
5. Reposition the pointer to the line beneath the table.

### Inserting a Horizontal Line

Click the Horizontal Line button.



### Inserting a Hotlink

1. Make sure the pointer is positioned at the bottom of the page.
2. Type:

### Go to Lyris.com

3. Highlight the text you just typed.
4. Click the Insert/Edit Link button.



This opens the **Link** dialog.

5. In the **URL** box, type:

**www.lyris.com**

6. Click the **Target** tab.
7. Click the **Target** box, and then choose **New Window (\_blank)**.
8. Click **OK**.
9. Click at the bottom of the page to deselect the text.

The **Go to Lyris.com** text is blue and underlined, indicating that it is now a link.

When you are finished, click the Maximize button to return to the normal view.



## Stopping ListManager

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### Windows

---

#### Stopping ListManager and ListManager Web Server- Windows Service

1. Click **Start**.
2. Click **Settings**.

3. Click **Control Panel**.
4. Click **Administrative Tools**.
5. Click **Services**.
6. Right click on the **ListManager** Service.
7. Select **Stop**.
8. Right click on the **ListManagerWeb** Service.
9. Select **Stop**.

### **Stopping ListManager and ListManager Web Server - Command Prompt**

Open the ListManager window.

1. Press *ctrl-c*.
2. Open the ListManager Web Server window.
3. Press *ctrl-c*.

## **Unix**

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### **Starting ListManager**

Log on as root.

1. Change to the ListManager directory. E.g: `/usr/local/lm/bin`
2. Run `./S96lm start` to start ListManager.
3. Run `./S96httpd-lm start` to start the ListManager Web Server.

### **Stopping ListManager**

Log on as root.

1. Change to the ListManager directory. E.g: `/usr/local/lm/bin`
2. Run `./S96lm stop` to stop ListManager.
3. Run `./S96httpd-lm stop` to stop the ListManager Web Server.

Note: When running ES 2.1, the webserver may not respond to `S96httpd-lm stop`. If that is the case, the process may be terminated using `kill -9`.

# Installing ListManager

## Before You Install

### General Installation Instructions

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Before you install ListManager, you'll need some information about the computer you're installing on and your network. The installer will prompt you for this information, so please have it handy when you install. These are general instructions for all platforms and SQL databases; consult the section on your particular database and operating system for more information.

### Pre-Installation Considerations

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ListManager is a 3-tier Internet application, and requires careful planning before installing in your network. Here is a series of steps to be considered as part of the installation process. Using these steps as a checklist before installing ListManager will ensure the best possibility for a smooth installation.

#### Network Architecture and Firewall Issues

ListManager has a number of [TCP and UDP connections](#) it establishes and for which it acts as a server.

If you are behind a firewall, and you plan on having ListManager running behind it, you'll need to [configure your firewall](#) so ListManager can send and receive mail properly.

How are you planning to route SMTP, DNS and web traffic in-and-out of ListManager? Are you going to have ListManager talk directly to the Internet, or have it relay email through another server?

#### SMTP Routing

If you have a mail server on the same machine you plan to install ListManager, you'll need to decide how you want to [configure your mail server to coexist with ListManager](#). ListManager uses its own mail server, and doesn't need another. If there is no mail server on the machine on which you are installing ListManager, you don't need to worry about mail server coexistence.

For each [site](#), you may wish to set up distinct domain names (e.g. lists.example.com). You'll need to have an MX record created for each distinct hostname that routes incoming email to ListManager (e.g., bounces, unsubscribes, list postings, etc).

#### Webserver

ListManager provides its own [proprietary webserver](#), and it is required to use and configure ListManager.

Apache and IIS are not required and cannot be used instead of the provided web server. If there is already a web server running on the machine where you'll be installing ListManager, the ListManager web interface will be installed on a different port.



You may wish to set up a stripped down version of the web server in your DMZ for handling interactions with the public, and keep the full administrative version of the webserver behind your firewall for internal use.

You may also wish to have a distinct URL for the web server that is used for handling opens, clickthroughs, clickstreams, action tags, etc. You will need a DNS A record which points to the IP address of the ListManager web server you have provided for recipient interaction (which may be distinct from the ListManager webserver you are using for administrative purposes)

## **Database Preparation**

ListManager uses your database to contain the data it needs to send and receive mail.

Before installing ListManager, you'll need to install the client tools on the system on which ListManager is going to be installed. ListManager will need to use the libraries provided by the client tools for database connectivity

If you are using your own SQL database server, you'll need to determine which database or instance to use for your ListManager tables, or create one specifically for ListManager. This step is not necessary if you are using an included database (MSDE).

Next, create the database (user/schema for Oracle) for ListManager to use.

Make sure you can connect from the ListManager host machine to the database using the client tools (Enterprise Manager or Query Analyzer for MSSQL, SQL\*PLUS for Oracle).

Character sets may be an issue (especially for Oracle). We support single byte character sets (such as ISO8859P1 (or equivalent) Western European encoding). If you use UTF-8 (or another multi-byte character set) as your base character set, you risk corruption of your messages and other data. Please see the user manual for the proper environment variable settings to use with ListManager.

## **Mail Server**

Routing mail to your internal mail servers can require some tuning of ListManager. ListManager typically performs its own DNS resolution, starting with the root name servers and top-level domain (TLD) name servers. When it tries to resolve your internal email addresses, it will try to connect to the outside IP address of your corporate mail server, which may be blocked by your firewall. Add an MX entry to the DNS bypass area of ListManager to route mail to the internal IP address ([Utilities: Administration: Server: Server Settings: DNS Bypass](#)).

## **Integration of ListManager with Existing Processes**

How are you currently sending mailings and maintaining a database of customers? How will you integrate ListManager into this environment? This Manual contains details at the database level for how we maintain data; it may be worth consulting with the Lyris technical staff to clarify details. Also, how your current mailings map onto our list and segmentation capabilities may need to be clarified.

## **Before Installation**

Be certain to download the correct installer. There are different installers for each operating system/database combination or the installer may complain about not having the correct libraries.

### **During Installation**

Please have the following information ready:

- ◆ Information about your SQL database (if using your own database, not one included with ListManager):
  - ◆ The name of your SQL machine.
  - ◆ The SQL database server login or user name (blanks allowed for MSSQL with integrated security).
  - ◆ The SQL database password (blanks allowed for MSSQL with integrated security).
  - ◆ The database name.
- ◆ Whether or not you have a mail server running on the ListManager machine. See [Mail Server Coexistence](#) for more information.
- ◆ What port you'd like the web interface on, if you already have a web server running (Unix only).
- ◆ Your ListManager serial code. If you don't have a serial code, contact your Lyris account representative at 800-768-2929 or [sales@lyris.com](mailto:sales@lyris.com).
- ◆ The email address and password of the server administrator.

### **Database Server Password Security**

As the database password is saved unencrypted in a file ([lmcfg.txt](#)), you may later remove the password saved in this file and then specify that the password be provided on startup by altering this file.

## **Mail Server Coexistence**

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Most users install ListManager on a machine separate from their mail server. If necessary, they create a [DNS Bypass](#) in ListManager so ListManager sends mail properly to the mail server.

In most cases, you will spare yourself *considerable work* if you can find a machine that is not running a mail server, and install ListManager on that machine. Most mail server companies never planned on coexistence as a need and consequently made it impossible for ListManager to work with them.

The issue is that your mail server wants to receive all the mail sent to your machine, and thus ListManager never gets a chance to see its own mail.

There are three techniques for having ListManager coexist with your mail server on the same machine:

### **1. Assign Mail Server and ListManager Different IP Addresses**

If your machine has more than one TCP/IP address and you can tell your mail server to leave at least one of those TCP/IP addresses unused, then ListManager can coexist on one (or multiple) TCP/IP addresses, and your mail server can exist on another.

You may set which IP addresses ListManager listens to in [Utilities: Administration: Server: Server Settings: Machine Settings: IP Addresses](#).

## **2. Mail Server Forwards Mail to ListManager.**

Configure ListManager to receive mail on a different port (port 26 is common) and then configure your mail server to forward mail on to ListManager running on a different port. To use this technique, you set up an alias for your machine (by adding a DNS 'A' RECORD) and inform your mail server that mail received for this address should be forwarded to ListManager that is running on a different port.

You may set which port ListManager listens to in [Utilities: Administration: Server: Server Settings: Network Settings: Ports](#).

## **3. ListManager Forwards Mail to Mail Server**

Configure your mail server to use another port, let ListManager answer mail on port 25, and inform it to forward non-ListManager mail on to your mail server that is running on an alternate port.

To instruct ListManager to forward non-ListManager mail, specify the IP address and port of your mail server in [Utilities: Administration: Server: Server Settings: Network Settings: Receive Email](#).

# **Firewalls**

## **Your Firewall and ListManager**

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If you have a firewall, you'll need to configure it properly so that ListManager can send and receive mail.

[Living with a Firewall](#) gives detailed instructions as to how to configure your firewall. [Ports ListManager Needs Open](#) is a handy reference of ports ListManager requires.

If you need internal mail to be routed in a particular fashion, see [Utilities: Administration: Server: Server Settings: DNS Bypass](#).

If you need ListManager to bind to particular IP addresses for SMTP and NNTP, see [Utilities: Administration: Sites](#). If you need ListManager to bind to particular IP addresses for DNS lookups, Tcpport, and Global Ban Server, see [Utilities: Administration: Server: Server Settings: Machine/Node Settings: IP Addresses](#).

### **How ListManager Sends Mail**

Even from the first versions, Lyris ListManager has featured an integrated mail server in the product. This mail server engine, which is now in its second major revision, allows ListManager to send at speeds that are very difficult to match with other products, such as SendMail or Qmail. ListManager can relay to these servers, but it is not generally

possible to reach the high delivery speeds ListManager can obtain using its integrated mail engine when using relaying.

ListManager 6.0h and later has its own DNS resolver built into the product. This resolver allows thousands of domains to be resolved each second, a speed which is difficult to match with other products, but which is required to keep up with ListManager's high mail sending speeds.

Both the mail sending engine and the DNS resolver that are built into ListManager require that they communicate directly with servers on the Internet in order for them to reach their maximum speed. This requirement introduces issues for some customers that want to protect their network with a firewall.

### **What Ports Are Required for ListManager to Send Mail**

In order for ListManager to function at its maximum speed and functionality, certain ports must be open in the firewall.

For mail sending, port 25 must be open in the firewall for TCP network traffic bi-directionally. ListManager must be able to initiate a connection to a server on port 25, and must be able to receive connections on port 25 from servers sending it mail.

For resolving DNS requests, the firewall must allow ListManager to send to port 53 using UDP from any high port (1024-65535) on the ListManager machine. The firewall must allow the response to this UDP request to return from the Internet to the same high port on the ListManager server. The ListManager DNS resolver uses UDP only, never TCP, and so no TCP ports need to be open for DNS requests.

For clickthrough and clickstream tracking, the firewall must allow access to the ListManager web interface, typically on port 80.

For NNTP (MultiView/newsgroup reading), the firewall must allow access on port 119 inbound to ListManager.

### **What if These Ports Can't Be Opened?**

Those who want ListManager's speed and full features will need to open these ports. However, there are others who need to enforce strict rules on their firewall that prohibit them from opening these ports.

If your company cannot open the ports for email sending and DNS resolution, ListManager has the ability to relay mail to another server for actual Internet delivery. As mentioned before, most mail servers cannot keep up with the high speeds with which ListManager can deliver mail. However, if your ListManager license has a low speed limit the slower speeds of a relay server may not be an issue for you.

Additionally, relaying mail reduces ListManager's ability to correctly report delivery statistics or delivery attempt details, since a different server does the actual delivery. When using a relay server, ListManager will report 100% success in delivering the mail, since the relay server should accept all mail provided to it. In reality, the relay mail server is unlikely to be able to deliver 100% of the mail to the Internet, but ListManager cannot report which recipients actually received the mail.

Since ListManager does not know about failed delivery attempts, it cannot manage members by removing those who are permanently undeliverable. Normally,

ListManager monitors who cannot receive mail and stops delivering to them. Without information about failed deliveries, ListManager will continue to attempt delivery to these addresses, using bandwidth and other resources.

Because of these problems, Lyris Technologies strongly recommends that every attempt be made to open these firewall ports, or to put the ListManager server in a DMZ where these ports may be open. However, if corporate firewall rules make doing so impossible, using a relay server is an option for some users.

**NOTE** If one or more relay hosts are defined, [domain connection limits](#) have no effect

## Living with a Firewall

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If you are using a firewall, you'll need to configure it properly so ListManager can send and receive mail, and so its web interface is visible.

Typically, users have one of two types of secure networks:

- A router/firewall combo is positioned at the gateway to the Internet. The immediate network sits right behind it.
- A router/firewall combo is positioned as the gateway to the Internet, with two separate networks branching out of it: one, into a "trusted, internal" branch and the other, a "non-trusted/DMZ" branch.

In general, we recommend deploying ListManager behind a firewall in a DMZ, so that the machine is separate from the trusted, internal network, and its access to the internal network is severely restricted. Regardless of your network configuration, it can be configured so that ListManager can work properly behind your firewall. If some of the terms are new to you, please scroll to the bottom of the page for a glossary.

### Steps to Have ListManager Work Through Your Firewall

1. Determine how you'd like ListManager to coexist with your mail server. Generally, it is easier to have your mail server and ListManager on separate machines, with a different IP address assigned to each, because you don't need to make any changes to your mail server. You can also have all incoming mail go to ListManager first, which can be configured to forward all non-ListManager mail to another mail server. Some mail servers can be configured to accept all mail, then forward ListManager's mail to it. Consult [Mail Server Coexistence](#) for more details on how ListManager can coexist with your mail server.
2. Obtain a set of external IP addresses from your backbone provider or Internet service provider (ISP). You must have AT LEAST one. Ideally, you'll have (at least) one for your mail server, and one for ListManager. Assign one external address to be used for ListManager.
3. Have your ISP make a DNS record for your ListManager IP address. Domain Name Service, or DNS, is a service used to resolve Internet hostnames, such as lyris.com, into their respective IP numbers, and vice-versa. Most users' DNS servers are

managed by their backbone providers or ISP, so it's nothing more than giving your provider the right information regarding the proper Resource Records that need to be added to your existing domain. You already have a DNS record if you're running a mail server and/or web server.

For example, let's say you own example.com, and you'd like to use the IP address 216.11.22.1 for ListManager. You would tell your ISP, or backbone provider, that 216.11.22.1 should be lists.example.com, or whatever domain you'd like for it to be. Generally, if you own yourdomain.com, then you would create a subdomain like lists.yourdomain.com, or newsletter.yourdomain.com, in order to have a nice domain name for your new ListManager server.

We recommend that your ISP also create a reverse DNS record for your domain. Forward DNS ensures that your domain resolves to your IP address. In our example above, lists.example.com would resolve to 216.11.22.1. Reverse DNS ensures your IP address resolves to your domain name—that 216.11.22.1 resolves to lists.example.com, for example. Some mail servers refuse to receive mail from hostnames that do not have reverse DNS.

Your ISP may ask you what you want your MX record to be. Your MX record states where mail for the domain should arrive. Tell your ISP to set the MX record as to be the same name as your ListManager domain (e.g., lists.domain.com). We don't recommend that you forward ListManager mail from your main mail server to ListManager, hence why it's important that the domain have its own MX record.

4. Assign an internal, static IP address for your ListManager machine. The machine behind the firewall should be assigned a non-routable, private IP address from one of the private address pools in existence today. Commonly used addresses are, 192.168.1.1, 10.1.0.1, 192.168.10.1, etc. Anything that starts with a 192.168. or 10.1. is considered private.
5. Configure your firewall. Depending on your firewall, one of the following methods should work for you. Note that the following is not a substitute for your firewall's documentation; it outlines general procedures you'll need to perform. Consult your firewall manufacturer if you have questions about your firewall.

Assign the ListManager IP address to your firewall and DNAT port 25 and port 80 to the machine behind the firewall which will be running ListManager.

For example, if you have an IP assigned to the firewall as 216.11.22.1, you would then forward all port 25 and 80 requests that arrive at that IP address to your internal IP, 192.168.1.1, port 25 and port 80. All requests to port 25 and 80 on 216.11.22.1 will automatically get routed to the internal address. All other port requests will be dropped or accepted, depending on your default policy rule in the firewall ruleset, or ACL (Access Control List).

If you happen to have a DMZ, and a separate, trusted internal network that houses your workstations, then all that you have to do is simply assign the machine to your DMZ, and perform the exact same steps for the firewall at the entrance of your DMZ as you would in the first example, where we only had a single firewall.

6. Start ListManager. It may complain about not having reverse DNS on its own IP address, but that will not keep it from running properly. Please do be sure it has reverse DNS on the external IP address, however--otherwise, other mail servers may reject your mail.
7. Go to [Utilities: Administration: Sites](#), and edit any sites you have, so that the Internet Host Name field for each site is the name of your new ListManager machine. Also assign the IP addresses ListManager should use for SMTP and NNTP on each site. These should be the *internal* IP addresses assigned to the machine.
8. Go to [Utilities: Administration: Server: Server Settings: Machine Settings: IP Addresses](#), and specify what IP addresses ListManager should bind to for DNS lookups. This should be the *external* IP address assigned to the machine.

## Glossary

**Network Address Translation**, or NAT, is the process of mangling packet headers to direct the payload of data to different points along a network. The basic principle of Network Address Translation is that for every packet that enters a specific interface, such as an Ethernet card, the ownership of that packet is in the hands of the firewall/router, and with that, we can alter the source and destinations of the individual headers; in effect, changing the outcome of the data packets to how we see fit. This is typically done through packet filtering means at the firewall interface. Most firewalls have GUI setup interfaces, while some only allow configuration through ANSI-based interfaces, and some are even managed using standard editors and config files alone.

**Destination Network Address Translation**, or DNAT, is the process where we can alter the packet's destination. In essence, as long as we have the packet, we can alter the header to our liking—in effect, sending the packet and all subsequent packets to any destination we choose.

**Domain Name Service**, or DNS, is a service used to resolve Internet hostnames, such as yahoo.com, into their respective IP numbers, and vice-versa. Most of our clients' DNS servers are managed by their backbone providers, so it's nothing more than giving their provider the right information regarding the proper Resource Records that need to be added to their existing domain.

**MX Record** The DNS record that specifies where mail for a domain should arrive. For instance, email for example.com might be routed to mail.example.com by using an MX record. If no MX is specified, the mail will be sent to the IP addressed specified for the host.

**Reverse DNS** The ability to resolve an IP address to a domain name.

## Ports ListManager Needs Open

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ListManager requires the following ports be open on your firewall:

25 - TCP for SMTP (receiving mail; inbound)  
53 - UDP for DNS lookups (outbound)  
80 - Web interface  
119 - TCP for NNTP (reading newsgroups; inbound)  
1024-65535 - inbound

Some strict firewalls have problems with ListManager's DNS lookups. ListManager initiates the transaction on port 53, and the data returns on some higher port. Most firewalls can keep state appropriately - they recognize that the request was initiated internally, and allow the inbound connection on the higher port. However, your firewall may need some additional rules to permit DNS information to be returned correctly to ListManager.

You may need to specify which IP addresses ListManager should use for SMTP, NNTP and DNS. The IP addresses ListManager uses for SMTP and NNTP may be configured for each site in [Utilities: Administration: Sites](#). The IP address that ListManager should use for DNS lookups may be configured for the ListManager machine in [Utilities: Administration: Server: Server Settings: Machine/Node Settings](#).

If you are running your web server on a different machine outside your firewall, or are running scripts against ListManager from a machine outside your firewall, you will also need to have the following ports open:

2021 - TCP for Tclport

## **How ListManager Initiates Connections**

### **Database Connections**

ListManager initiates a TCP connection to your database server (typically port 1433 for MSSQL, 1521 for Oracle).

### **SMTP Connections**

ListManager initiates TCP connections to port 25 of external and internal mail servers. Incoming TCP connections come to port 25 of ListManager for incoming SMTP traffic (bounces, unsubscribes, etc).

### **DNS Connections**

UDP DNS traffic initiates from ListManager to port 53 of worldwide name servers, and returning UDP DNS response traffic from port 53 of remote name servers.

### **HTTP Connections**

Outgoing HTTP TCP on port 80 on the ListManager host machine is useful for configuration (downloading libraries) and web fetch.

Incoming HTTP TCP traffic to port 80 of the ListManager web server allows ListManager to track opens and clickthroughs, and allows access to the ListManager web interface.

### **TCLPort Connections**

The ListManager web server will initiate TCP traffic over port 2021 to the ListManager server for information to render web pages. The web server does not talk to the database directly; it uses ListManager as a proxy to get information from the database.



# Installing on Windows

## Installing ListManager on Windows -- Overview

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See [General Installation Instructions](#) for information about installing ListManager on all platforms and database servers.

Before installing, have the following information ready:

- Information about your SQL database (if using your own database, not one included with ListManager):
  - The name of your SQL machine.
  - The SQL database server login or user name (blanks allowed for MSSQL with integrated security).
  - The SQL database password (blanks allowed for MSSQL with integrated security).
  - The database name.
- Whether or not you have a mail server running on the ListManager machine. See [Mail Server Coexistence](#) for more information.
- Your ListManager serial code. If you don't have a serial code, contact your Lyriss account representative at 800-768-2929 or [sales@lyris.com](mailto:sales@lyris.com).
- The email address and password of the server administrator.

To install ListManager on Windows, download the installer from the Lyriss web site, and double click to open and begin the installation process.

See the following pages for database-specific information and setting up ListManager as a service:

[MSDE](#)  
[Microsoft SQL](#)  
[Oracle](#)  
[Windows Services](#)

## Microsoft SQL and ListManager

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If you have never installed Microsoft SQL Server (MSSQL) before, this section will advise you on some basic steps to take. These instructions should not take the place of a qualified network administrator or any information provided by Microsoft.

### Software Requirements

- MSSQL 2000 SP4 or MSSQL 2005
- Windows 2000, XP or 2003

Note: Windows 2003 Server Web edition is not supported, as Microsoft SQL Client Tools cannot be installed on this platform.

## OLE-DB

ListManager has had its database connectivity libraries upgraded from the obsolete db libs libraries to the current OLE-DB libraries. The OLE-DB library is natively supported by the Windows operating systems dating back to Windows 2000. For Windows 2000, it will require upgrading to MDAC (Microsoft Data Access Components) version 2.80 or better for connections to work (more recent versions of Windows should have the required MDAC version). Besides increased stability, the OLE-DB will remove restrictions imposed by the older libraries, such as restrictions on the maximum sizes of particular database data types, such as varchars.

- **NOTE** If you are using MSSQL Server 2000, you must upgrade to Service Pack 4 (SP4) in order for ListManager to run correctly with OLE-DB:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=8e2dfc8d-c20e-4446-99a9-b7f0213f8bc5&displaylang=en>

### Checking the MDAC version

1. Go to <http://support.microsoft.com/kb/301202> and download the MDAC checker . Download cc\_pkg.exe
2. Extract to default location: C:\CompChecker .
3. On the Component Check, choose the default: **Perform analysis of your machine and automatically determine the release version.**
4. In the left hand window, you should see the MDAC version under **File Details**. If the MDAC version is not 2.8, you need to upgrade the MDAC (the default version for Windows Server 2000 is MDAC 2.5SP3).

### Upgrading MDAC to version 2.8

1. Go to :  
<http://www.microsoft.com/downloads/details.aspx?FamilyID=6c050fe3-c795-4b7d-b037-185d0506396c&displaylang=en> and install the MDAC 2.8
2. Download MDAC\_TYP.EXE version 2.80.

### Restarting the server

1. CD C:\CompChecker and run cc.exe.
2. Run the default analysis.
3. Now you should see MDAC 2.8 RTM in the **File Details** on the left hand window in Component Checker .

### Installation Options

Whether or not you are able to use all the installation defaults depends on whether you are a Microsoft house running Domain Controllers or not.

### Windows Authentication

If you mainly use Microsoft software and have Domain Controllers established, then you can just select all the defaults from the wizard provided by the SQL Server installation tool. This will set your SQL Server to listen for secure connections only. Any user IDs that you want to create must be added as Windows users and mapped to the correct group in SQL Server. Please consult your manuals or Microsoft help if you have questions of how to do this.

### SQL Server Authentication

If you do not primarily use Microsoft software, and do not run Domain Controllers, then you will not be able to accept all the defaults for the SQL Server install. When you get a chance to choose “Advanced Options” select Mixed Mode authentication to allow both Windows authentication and SQL Server authentication. This is the only change you need to make. Otherwise, just accept the remaining defaults.

As the SQL database password is saved unencrypted in a file ([lmcfg.txt](#)), you may later remove the password saved in this file and then specify that the password be provided on startup by altering this file.

Note: You must have a case-insensitive sort order installed (the MSSQL default).

## **Creating a Database**

Once your SQL Server is installed, you will need to create a database for ListManager to use.

1. Open Enterprise Manager, a tool included with your SQL Server installation.
2. Register the SQL server you'd like to use with Enterprise Manager. If the SQL Server is on the same machine which is running Enterprise Manager, you can register the name of the server as “(local),” or just leave the entry blank. Otherwise, enter the name of the remote server.
3. Choose the entry for “Connection” that matches your configuration described above. If you mainly use Microsoft software then leave the selection on “Use Windows Authentication”. If not, choose “Use SQL Server Authentication” and supply the user name and password to connect. If you have just installed the server for the first time you can use the login “SA” with a blank password. All the other options on that dialog box can be left as defaulted.
4. Once you have defined a connection to your server, expand the tree for that selection by clicking on the “+” sign next to the server.
5. Right-click the “Databases” folder, and select the option to create a new database.
6. Give the database a name appropriate for your use. If you are uncertain, you can use the name “ListManager”. The database name cannot have spaces or hyphens. All other choices in this dialog box may be left with the default value; however, we recommend setting the database autogrow size to 1GB .

At this point you have the SQL Server installed with an empty database ready for ListManager to run with!

Note: The ListManager database should be in the default instance of your SQL server. This is only for customers who may be running multiple instances of SQL server on the same machine.

## **Installing the Client Tools**

If you are not running MS SQL on your ListManager machine (not recommended), you need to install the MS SQL Client Tools on the machine that will be running ListManager (and any other machine you'd like to be able to connect to the SQL Server). Client Tools are auxiliary programs that are necessary to connect to and manage your MS SQL server.

These tools come in two installation forms: Connectivity Only, or Server and Client Tools. All you need is the client tools (connectivity), but if you want to install more it will also install the client tools, so either choice is fine.

If you are running MS SQL Server and ListManager on the same machine (not recommended), you may skip this step, as the required client tools have already been installed as part of the server installation.

## MSDE and ListManager

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If your version of ListManager includes MSDE, you won't need to worry about preparing your database or connecting ListManager to it--the ListManager installer takes care of that for you.

Do not use Terminal Services to install the MSDE version of ListManager remotely. The MSDE version of ListManager cannot be installed successfully using Terminal Services.

You may encounter difficulties using MSDE and ListManager if you have previously installed Microsoft SQL server client tools on the machine that is to run ListManager. If you have, you'll see the following warning message from the installer:

```
Warning: It appears that you have (or have had) a version of
Microsoft SQL Server installed that conflicts with the bundled
server.

Do you want to use ListManager for Microsoft SQL Server instead?
That is a different installer.
```

If you're sure you want to use the bundled MSDE database server, you should uninstall Microsoft SQL Server software if you find that you're having problems with MSDE.

### Notes on MSDE server limitations

There is a 2 GB limit to the total size of the MSDE database. If you are upgrading from ListManager 4.x, you should calculate the total size of your db directory to see if you can use MSDE.

The optimal number of database connections for MSDE is 8.

More information about maintaining MSDE may be found in [Database Maintenance](#).

## Oracle and ListManager (Windows)

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## Preparing the ListManager Server

Before installing ListManager, you'll need to install the Oracle Client Tools (or Basic Client Software) on the machine which will be running ListManager. Then, you'll create a user and password to be used by ListManager. When you're done, you're ready to install ListManager.

1. Install the Oracle Client Tools on the machine which will be running ListManager.
2. Run the Configuration Assistant:
  1. Select "Local Net Service Name configuration, and select Next.
  2. Select "Add" when asked what access you'd like to set up.
  3. Select "Oracle9 database or service" when asked what version of Oracle database to access.
  4. Enter the Service Name.
  5. Select TCP.
  6. Enter in additional information as required by your network protocol.
  7. Perform a test of your connectivity.
  8. Select a Net Service Name.
3. Open SQL\*PLUS, and log on as system.
4. Enter the following lines:

```
create user username identified by password default tablespace
users quota unlimited on users;
```

```
grant connect, resource to username;
```

The DBA will need to know the common permissions required for Oracle users. The previous is an example only. You may use any *username* or a different tablespace if desired.

You're ready to install ListManager! Be sure you select the installer that matches the version of client tools you've installed.

## Changing the Character Set of your Oracle Instance

Oracle servers, by default, do not install with a character set that allows 8-bit ASCII characters to be represented correctly. Any high ASCII characters (greater than 127) are translated into other characters. This can cause a problem if you expect that any mail flowing through ListManager will use special accent characters, such as ÿ or á. If your server has this problem, ListManager will give you one of these errors when starting it in the foreground:

```
Your database is not configured to store all data exactly as it
was
sent. This will cause some messages, especially those in foreign
languages, to be incorrectly saved. It is recommended that you
change
your database configuration to ensure that this is not a
problem.
Your database and/or client configuration will cause problems,
as
errors were generated when special characters (such as used by
foreign
languages) were sent and/or retrieved from the database. This
will
VERY LIKELY CAUSE ERRORS and should be corrected before
continuing.
```

To solve this problem, create your Oracle instance with an 8-bit ASCII character set. If you don't have a preference, we recommend you use:

```
WE8ISO8859P1
```

This character set appears to also be the one used by Windows as its default, so if both client and server are set to use the same character set, you need not worry about characters being translated.

However, if you choose a different character set, the data will be translated into the client character set, which will almost certainly cause problems. The client character set can be configured using an environmental variable called NLS\_LANG. The syntax of the variable is <language>\_<country>.<char set>, such as

```
American_America.US8PC437
```

### Database Server Password Security

As the database password is saved unencrypted in a file ([lmcfg.txt](#)), you may later remove the password saved in this file and then specify that the password be provided on startup by altering this file.

### Setting the Environment Variable for Windows

1. In the Control Panel, open System. Select the "Advanced" tab.
2. Select Environment Variables
3. In the System Properties for Environment Variables, assign "NLS\_LANG" to "American\_America.US8PC437".

## Windows Services

---

On Windows 2000/XP, ListManager and the ListManager Web Server can run as services.

### Installing the ListManager and ListManager Web Server Services

1. Click on **Start**, then **Programs**.
2. Select **Lyris ListManager**.
3. Select **Services**.
4. Select **Install ListManager Service**.
5. Repeat, but select **Install LM Web Service**.

### Uninstalling the ListManager and ListManager Web Server Services

1. Click on **Start**, then **Programs**.
2. Select **Lyris ListManager**.
3. Select **Services**.
4. Select **Uninstall ListManager Service**.
5. Repeat, but select **Uninstall LM Web Service**.

### Installing and Uninstalling the Service from the Command Prompt

To install the Windows service from the command line, open a command prompt, change to the ListManager directory, and run the following command:

```
lm -install
```

For Windows 2000/XP only. ListManager will then be listed in the "Services" control panel, as a service automatically started up at boot time. You can start and stop the ListManager service from the "Services" control panel. The service runs in the background, so you will not see it on your desktop.

To remove the Windows service from the command line, open a command prompt, change to the ListManager directory, and run the following command:

```
lm -remove
```

To start ListManager from the command line after installing it as a service, run the following command:

```
net start listmanager
```

To stop ListManager from the command line after installing it as a service, run the following command:

```
net stop listmanager
```

### Running MSDE as a Service

MSDE is installed to automatically run as a service. To start MSDE from the command line after it has been installed as a service, run the following command:

```
net start mssqlserver
```

To stop MSDE from the command line after it has been installed as a service, run the following command:

```
net stop mssqlserver
```

## Installing on Linux

### Installing ListManager on Linux -- Overview

---

See [General Installation Instructions](#) for general information about installing ListManager on all platforms and database servers.

Also see [Supported Platforms](#) for supported operating systems and databases. Other operating systems and databases have not been tested, and are not supported.

ListManager for Unix does not include a database as part of the installer. Before you install ListManager on Linux, you will need to have a database server already installed, and client software installed on the ListManager server if it will be connecting to the database remotely.

After downloading the correct installer for your operating system and database, install ListManager by running the installation program, "install\_lm.pl".

Please have the following information ready:

- Information about your SQL database (if using your own database, not one included with ListManager):
  - The name of your SQL machine.
  - The SQL database server login or user name (blanks allowed for MSSQL with integrated security).
  - The SQL database password (blanks allowed for MSSQL with integrated security).
  - The database name.
- Whether or not you have a mail server running on the ListManager machine. See [Mail Server Coexistence](#) for more information.
- What port you'd like the web interface on, if you already have a web server running (Unix only).
- Your ListManager serial code. If you don't have a serial code, contact your Lyris account representative at 800-768-2929 or [sales@lyris.com](mailto:sales@lyris.com).
- The email address and password of the server administrator.

If you have previously installed ListManager, you should still run the "install\_lm.pl" program. It will ask you if you are upgrading an existing copy of ListManager, and if you answer yes, will automatically upgrade your ListManager installation for you.

## Required Unix File Descriptors

---

The number of file descriptors you need depends on the version of ListManager you are running. We recommend the following number of file descriptors depending on your license level:

### File Descriptors

License	File Descriptors
Platinum or less 10,000 msgs/hr	1000
Platinum Plus 100,000 msgs/hr	2000
Diamond 200,000 msgs/hr	4000
Extreme 300,000+ msgs/hr	8000

On most versions of Unix, run the following command:

```
ulimit -n
```

If the number displayed is smaller than the values displayed above for your license, you do not have enough file descriptors for ListManager to function properly.

Run the following to increase them:



```
ulimit -n 4000
```

Example:

```
root@siri2:/# ulimit -n
64
root@siri2:/# sh
# ulimit -n 4096
# ulimit -n
4096
#
```

## Installing/Running as Non-Root

---

We strongly recommend that ListManager run as root. Normally, ListManager runs as root to have access to the ports and network files only root has access to (e.g., SMTP on 25).

However, if you want to install and run ListManager with a user other than root, simply run the installer as the user who should own ListManager. The installer will warn you against doing so, and inform you that the standard ports ListManager uses will be moved as follows:

```
Tcl Webserver: 1080
SMTP: 1025
NNTP: 1119
```

In order for others to access ListManager, you will need to route traffic that normally would come to ListManager on ports 80, 25 and 119 to the ports specified for your ListManager installation.

## Installing on Linux

---

When installing and running ListManager, you will need to be logged in as root.

### Basic Installation

1. Download the installation file.
2. Untar and unzip the file in the directory of your choice.

```
gunzip lm-x.x-abcd.tar.gz
tar xf lm-x.x-abcd.tar
```

3. Cd to the directory created after untarring/unzipping the installation file.

4. Run (as root):

```
./install_lm.pl
```

After installation is complete, you may remove the files created by the installer.

## Oracle and ListManager (Linux)

---

Note: Although ListManager may use Oracle, Lyris does not support the Oracle database itself. These instructions are provided for the convenience of those using ListManager with Oracle. For complete Oracle documentation, go to <http://oracle.com/>.

Before installing ListManager, you'll need to install the Oracle Client Tools (or Basic Client Software) on the machine which will be running ListManager. Then, you'll create a user and password to be used by ListManager. When you're done, you're ready to install ListManager. Your DBA (database administrator) can assist you in installing the client software on the server that will be running ListManager.

Be sure that LD\_LIBRARY\_PATH is set to point to Oracle's libraries before installing, and that you select the installer that matches the version of client tools you've installed.

### Permissions Needed to run ListManager against your Oracle database

The DBA will need to know the common permissions required for Oracle users. The following is an example only. You may use any *username* or a different tablespace if desired.

```
drop user username cascade;  
create user username identified by password default tablespace  
users quota unlimited on users;  
grant connect, resource to username;
```

### Changing the Character Set of your Oracle Instance

Oracle servers, by default, do not install with a character set that allows 8-bit ASCII characters to be represented correctly. Any high ASCII characters (greater than 127) are translated into other characters. This can cause a problem if you expect that any mail flowing through ListManager will use special accent characters, such as ÿ or á. If your server has this problem, ListManager will give you one of these errors when starting it in the foreground:

```
Your database is not configured to store all data exactly as it  
was sent. This will cause some messages, especially those in  
foreign languages, to be incorrectly saved. It is recommended  
that you change your database configuration to ensure that this  
is not a problem.
```

```
Your database and/or client configuration will cause problems,  
as errors were generated when special characters (such as used  
by foreign languages) were sent and/or retrieved from the  
database. This will VERY LIKELY CAUSE ERRORS and should be  
corrected before continuing.
```

To solve this problem, create your Oracle instance with an 8-bit ASCII character set. If

you don't have a preference, we recommend you use:  
WE8ISO8859P1

However, if you choose a different character set, the data will be translated into the client character set, which will almost certainly cause problems. The client character set can be configured using an environmental variable called NLS\_LANG. The syntax of the variable is <language>\_<country>.<char set>, such as

```
American_America.US8PC437
```

### Setting the Environment Variable for Unix

For a UNIX client, set the environment variable in this manner. Try each one until the error message no longer appears on boot up.

```
csh/tcsh: setenv NLS LANG 'AMERICAN AMERICA'  
setenv NLS LANG 'AMERICAN AMERICA.WE8ISO8859P1'  
setenv NLS LANG 'American America.US8PC437'  
  
sh/bash: NLS LANG='AMERICAN AMERICA'; export NLS LANG  
NLS LANG='AMERICAN AMERICA.WE8ISO8859P1'; export NLS LANG  
NLS LANG='American America.US8PC437'; export NLS LANG
```

Once you have determined which one is the correct one, you should configure the appropriate startup file (e.g., /etc/profile or similar) to set NLS\_LANG so that ListManager will have it set properly at startup.

### Database Server Password Security

As the database password is saved unencrypted in a file ([lmcfg.txt](#)), you may later remove the password saved in this file and then specify that the password be provided on startup by altering this file.

## Installing ListManager by Hand

---

If you do not want to use the "install\_lm.pl" script, you can follow these steps to install ListManager by hand.

1. Uncompress the ListManager tar file to the directory from which you will run it (which will henceforth be referred to as *~lm*).
2. Install and configure the appropriate database software or client software. Create a database for ListManager to use.
3. Rename *~lm/bin/lmcfg\_template.txt* to *lmcfg.txt*, and edit it, adding database connection information.

Note that you can install more than one icon on your desktop for different *lmcfg.txt* files by [adding a command-line argument](#) to specify a different *lmcfg.txt* file.

Check the database connection by running the following command:

```
~lm/bin/lm version
```

If ListManager connects successfully, a version string is displayed.

4. Run the following command:

```
~lm/bin/lm dbcreate <admin-password>
```

To create the Lyris database tables. Specify the administrator password you would like to use on this server. For example, "lm dbcreate sesame" would create an account named "admin" with a password of "sesame"

5. Run the following commands:

```
lm serial yourserialnumber  
lm getactivation
```

This will enter your serial number, and retrieve your activation code.

6. If you want ListManager to run its SMTP receiving agent on an alternate port, run the following command:

```
~lm/bin/lm smtpport 26
```

Where "26" specifies the port you want ListManager to use.

7. If you do not allow ListManager to listen to 127.0.0.1, you will need to edit the file "tclhttpd.rc" that is located in your tclweb/bin directory, so that the line which reads "Config ipaddr" points to a TCP/IP address that ListManager is listening on.

Note: The Command Protocol that the web interface uses to communicate with ListManager listens on port 2021.

8. Run the command:

```
ulimit -n 5000
```

(preferably in the *bash* shell) to increase your file descriptor limit. Then, run:

```
~lm/bin/lm start
```

To run ListManager in the foreground, or run the command:

```
/opt/lm/bin/lm start 1>/tmp/lm_stdout 2>/tmp/lm_stderr &
```

You can now run ListManager in the foreground with the command:

```
/opt/lm/bin/lm start
```

Note:

If you run ListManager in the foreground without running the output to a logfile, and you inadvertently click on the window commenting any text, the process running in the window will halt. To stop this from occurring, either:

- pipe the output to a logfile

or

- turn off the Quick edit mode by right clicking on the Windows bar and going to Properties -> Options -> uncheck "Quick edit".

To start ListManager in the background, in "sh" or "bash" use a command such as

```
/opt/lm/bin/lm start 1>/tmp/lm_stdout 2>/tmp/lm_stderr &
```

To run ListManager in the background. If you encounter a problem, run ListManager in the foreground, with the command "~lm/bin/lm start".

9. Send mail to listmanager@your-server to make sure that ListManager is answering email.

10. Rename the file ~lm/tclweb/bin/tclhttpd\_template.rc to tclhttpd.rc. Edit it, replacing 'HOSTNAME' with the name of the machine; 'SPORT' with the port you want the web server to listen to (e.g., 80); and 'EMAILADDR' with the email address of the administrator.

11. Run the command:

```
~lm/tclweb/bin/httpd-lm
```

To run the ListManager Web Server in the foreground, or run the command:

```
~lm/tclweb/bin/httpd-lm 1>/tmp/httpd-lm-stdout.txt 2>/tmp/httpd-lm-stderr.txt &
```

To run the ListManager Web Server in the background.

12) With a web browser, go to the URL <http://your-server.com/>.

For Linux users, Linux normally has a limitation of 4096 file descriptors for the whole OS (1024 max per process). To increase the maximum for the whole OS, you edit the /proc/sys/fs/file-max file.

ListManager should now be running on your system.

## Configuring ListManager After Installing

---

Once you have completed the installation program, you will be shown a page such as the one below. This page gives you basic startup directions for configuring your ListManager now that it is installed.

```
Lyris ListManager has now been installed on your system!
```

```
You can now run ListManager in the foreground with the command:  
/usr/local/lm/bin/lm start
```

```
To start ListManager in the background, in "sh" or "bash" use a  
command such as:  
/usr/local/lm/bin/lm start >/tmp/lm stdout 2>/tmp/lm stderr &
```

```
We recommend that you first run ListManager in the foreground,  
so that you
```

see any warning messages. If you encounter a conflict on port 25 with Sendmail, please see the README file.

You can start the ListManager daemon by running:  
/usr/local/lm/bin/S96lm start  
and stop it by running:  
/usr/local/lm/bin/S96lm stop

You can start the ListManager Web Server daemon by running:  
/usr/local/lm/bin/S96httpd-lm start  
and stop it by running:  
/usr/local/lm/bin/S96httpd-lm stop

To create your first mailing list, you can point your web browser at:

`http://yourserver.com/`

When prompted for a user name and password, you should give the name "admin" and the password "lyris"

A log of the actions taken by this installation program has been saved to /usr/local/lm/install.log

A ListManager uninstall script has been created for you at:  
/usr/local/lm/uninstall lm now

If you would like to review this information at a later time, you can find it in /usr/local/lm/README.

## Creating and Using a Customer Domain

### Creating a Using a Customer Domain / ListHosting

---

A custom domain allows you to use your domain name even though you are sending through our network. Your customers see your custom domain where they would otherwise see the domain name of your Lyris server.

For example, if the name of your server is "lists.lyris.net", a custom domain will mask all links to look like they are coming from your organization, e.g. "lists.example.com."

#### **What Can I Use for a Custom Domain?**

You may add a word to any domain you control to create a custom subdomain. For example, if you owned the domain "example.com", you could create "lists.example.com", "offers.example.com" and so forth.

You couldn't use just "example.com", as email for that domain is already going to your organization's mail server.

#### **How Can I Create a Custom Domain?**

### **Create a custom domain in DNS.**

Once you've decided what your domain will be, you must contact the person in charge of your domain record and request that they create a **CNAME DNS** entry. For example, let's say your domain name is "example.com", and you have a list on "lists.lyris.net". You want to use a custom domain "lists.example.com". You would create a DNS entry:

```
Lists.example.com IN CNAME lists.lyris.net.
```

### **2. Inform Support the name has been created.**

Create a ticket [here](#) informing Support the custom domain is ready. They will enable your server to use it.

### **What if I want to use A/MX Records?**

The advantage of using a CNAME record is that if your server must be moved to a different IP address, you will not have any interruption of service.

If you would like to use A/MX records instead, make the following DNS entries with the appropriate values for you:

```
Lists.example.com IN A 192.168.1.200
Lists.example.com IN MX lists.lyris.net
Lists.example.com IN TXT "v=spf1 a mx -all"
```

For "lists.example.com" you should use the custom domain you'd like to use, for "192.168.1.200" the IP address of your ListManager server, and for "lists.lyris.net" the name of your ListManager server.

The TXT record creates an SPF/Sender ID record that assists with deliverability.

**NOTE** If you use A/MX records for your custom domain and if we need to change the IP address for your server your custom hostname will not work until you change your records to reflect the new IP address.

## **Creating and Using a Custom Domain / Sparklist**

A custom domain lets you use your domain name even though you are sending through our network. Your customers see your custom domain where they would otherwise see the domain name of your Sparklist server.

For example, if the name of your server is "lists.sparklist.com," a custom domain will mask all links to look like they are coming from your organization, e.g. "lists.example.com."

### **What Can I Use for a Custom Domain?**

You can add a word to any domain you control to create a custom subdomain. For example, if you owned the domain "example.com," you could create "lists.example.com," "offers.example.com" and so forth.

You couldn't use just "example.com," as email for that domain is already going to your organization's mail server.

## How Can I Create a Custom Domain?

### Create a custom domain in DNS.

Once you've decided what your domain will be, you must contact the person in charge of your domain record and request that they create a **CNAME DNS** entry. For example, let's say your domain name is "example.com," and you have a list on "lists.sparklist.com." You want to use custom domain "lists.example.com." You would create a DNS entry:

```
Lists.example.com IN CNAME lists.sparklist.com.
```

### 2. Inform Support the name has been created.

Create a ticket [here](#) to inform Support the custom domain is ready. They will enable your server to use it.

### What if I want to use A/MX Records?

The advantage of using a CNAME record is that if your server must be moved to a different IP address, you will not have any interruption of service.

If you would like to use A/MX records instead, make the following DNS entries with the appropriate values for you:

```
Lists.example.com IN A 192.168.1.200
Lists.example.com IN MX lists.sparklist.com
Lists.example.com IN TXT "v=spf1 a mx -all"
```

For "lists.example.com" you should use the custom domain you'd like to use, for "192.168.1.200" the IP address of your ListManager server, and for "lists.sparklist.com" the name of your ListManager server.

The TXT record creates an SPF/Sender ID record that assists with deliverability.

**NOTE** If you use A/MX records for your custom domain and if we need to change the IP address for your server your custom hostname will not work until you change your records to reflect the new IP address.

## After You Install

### How Can ListManager Use My Data?

---

ListManager uses a single *members\_* table which contains the email addresses and other information it needs to send email messages. You may already have data about your list members in your own database table, and you'd like to use this data when sending out mail using ListManager. There are a number of ways of having ListManager use this data, depending on how your database is set up and how you'd like it to work. Here are some suggestions:

1. Add columns with pertinent member information to your ListManager *members\_* table, and [import your members](#) with this additional information. Use a [CSV member import](#), triggers, the ListManager SOAP [API](#), or [ODBC database synchronization](#) to keep the data between your other tables and the ListManager *members\_* table in synch.



2. Import your members into the ListManager members\_ table, and use a column you've added to the members\_ table to refer to the primary key used by your other table. You may then create [advanced subsets](#) which join to that other table based on the added field.
3. Import your members into the ListManager members\_ table, and create a lookup table which matches the ListManager members\_.MemberID\_ field with the primary key of the table which contains the additional data you need for your mailings. You may then create [advanced subsets](#) which join to that other table.

## Antivirus Gateway Software and ListManager

---

ListManager does not scan for viruses in incoming messages. Although match phrases and list security will keep most viruses out, you may wish to use gateway antivirus software with ListManager. If you are using gateway antivirus software, it will accept email on port 25, scan it, and pass it to ListManager on a different port.

ListManager must be configured to use the port specified by your antivirus software to receive email. There are two ways of doing so:

### Changing the ListManager SMTP Port Through the Web Interface

1. When configuring or installing your gateway antivirus software on the machine that is running ListManager, note the port to which it will forward mail.
2. In the ListManager web interface, go to Utilities: Administration: Server: Server Settings: Network Settings: Ports.
3. Specify the port on which ListManager should receive mail from your mail server in Incoming SMTP Port.
4. Save the page.
5. Shut down ListManager.
6. Restart ListManager, and start your gateway antivirus software. ListManager will now be accepting mail from the antivirus software on the port you specified.

### Changing the ListManager SMTP Port from the Command Line

1. When configuring or installing your gateway antivirus software on the machine that is running ListManager, note the port to which it will forward mail.
2. Shut down ListManager.
3. Open a command prompt, and cd to the ListManager directory
4. On the command line, use the smtpport command to specify the port on which ListManager should receive mail from your mail server. Example:

```
lm smtpport 26
```

5. Restart ListManager, and start your gateway antivirus software. ListManager will now be accepting mail from the antivirus software on the port you specified.

Note that you may need to stop your antivirus software, start the ListManager web server, and then restart the antivirus software to have the ListManager web server start after installing ListManager.

## Uninstalling ListManager

---

You may use the uninstall program to remove ListManager from your system.

Before running the uninstall program, be sure you:

1. [Stop ListManager](#) and the ListManager Web Server.
2. (Windows) Remove the ListManager and ListManager web server services. See [Windows Services](#) for more information.
3. (Unix) Remove any start scripts you have installed.

### Uninstalling on Windows

Remove the services for Windows (if applicable):

1. In the left Navigation bar, click **Start > Program Files > Lyris ListManager > Services**.
2. Click on **Remove ListManager Service**.
3. Click on **Remove LM Web Service**.

### Uninstall ListManager:

1. In the left Navigation bar, click **Start > Settings > Control Panel**.
2. Select **Add or Remove Programs**.
3. Select **Lyris ListManager**.
4. Click **Change/Remove**.
5. When prompted to remove Lyris ListManager, click **Yes**.

If there are any files left in your ListManager directory after the uninstaller has completed, you may safely delete them and the directory by hand.

### Uninstall MSDE (if applicable):

1. In the left Navigation bar, click **Start > Settings > Control Panel**.
2. Select **Add or Remove Programs**.
3. Select **Microsoft SQL Server Desktop Engine**.
4. Click **Change/Remove**.
5. When prompted to remove Microsoft SQL Server Desktop Engine, click **Yes**.

### Uninstalling on Unix

If you already have ListManager installed on your Unix system and want to remove it, here are the steps you should take:

1. Log in as root.
2. Stop the ListManager process. On Linux, the shutdown command is:

```
kill -15 `cat /var/run/lm.pid`
```

3. Delete any startup scripts you created on your own.
4. Change to the ListManager/bin directory.
5. Run the **uninstall\_lm\_now script**. It will delete your ListManager directory and everything in it. Or, you may remove the ListManager directory. For example:

```
rm -rf /opt/listmanager
```

## Synchronizing Data Using ODBC

### ODBC -- Overview

---

ListManager may synchronize its data with other databases using ODBC (Open DataBase Connectivity).

To use ODBC, the administrator must first install the correct ODBC 3.51 compliant driver for the datasource on the ListManager server. UNIX users should use [unixODBC](#) along with the vendor-specific ODBC 3.51-compatible driver.

Next, the server administrator must create a [Database Connection](#) in Utilities: Administration: Server: Database: Database Connections, specifying the [connection string](#) and SQL query to be used to connect to the external database.

Once the database connection has been created, a list, site or server administrator may enable the database synchronization for a particular list in [Members: Synchronization Settings](#), and further specify how ListManager should handle data from the external data source, and with what frequency.

The server administrator may also specify the default frequency for database synchronization in [Utilities: Administration: Server: Server Settings: Scheduled Tasks: Synchronize Lists](#).

Administrators may also opt to have ListManager synchronize data before sending a mailing in [Mailings: New Mailing: Recipients](#), to ensure that ListManager is using the most updated information before sending mail.

See [Database: Add Member Column](#) for information about how to add additional columns to the ListManager members\_ database.

## Important ODBC Notes

- ODBC in ListManager has been tested against Oracle, Microsoft SQL Server, and MySQL. Other databases should also work, but are not supported.
- ListManager checks the entire members\_ table each time it synchronizes its data; it does not only look for new or changed data.
- ListManager does not check to see if there is sufficient space in the database before performing synchronizations.
- Synchronization can take a long time. In our internal tests, a synchronization against a list of one million members took three hours. If you are synchronizing large amounts of data, you may opt to use methods other than ODBC to keep it in sync.
- Synchronization requires more space on your ListManager database server. The amount of space depends on how much data you are synchronizing against.
- Do not update the password\_ field. The ListManager password\_ field is encrypted.

## ODBC on Unix

---

1. On the ListManager server, download, gunzip and untar UnixODBC from <http://www.unixodbc.org/>. Read the included documentation carefully, and be sure you are using the correct libraries.

Tip: Use `odbcinst -j` to see where UnixODBC is installed.

UnixODBC contains the `odbcinst.ini` and `odbc.ini` files, which will point to the specific driver(s) you are using.

2. On the ListManager server, download and install the correct ODBC driver for your database. Read the included documentation carefully. In our testing, we used drivers from:

<http://dev.mysql.com/downloads/connector/odbc/3.51.html>  
<http://www.easysoft.com/>

The driver installer should prompt you for database connection information and populate the `odbc.ini` file with the correct values.

3. The installer for the driver may ask whether you want to use a connection string to connect, or DSN (Data Source Name). Both contain connection information, but in different formats and in different places.

This is the value you will enter in [Utilities: Administration: Server: Database: New Database Connection: Connection String](#). Note: In our tests, drivers from Easysoft always use DSN.

### Sample Connection Strings

#### MS SQL

Driver={SQL Server};Server=Imtest;Database=Imdb;Uid=sa;Pwd=pass

## Oracle

```
DSN=DSN_Name;Server=lmtest;Uid=lmuser;Pwd=pass
```

## MySQL For Unix:

```
Driver={MySQL ODBC 3.51  
driver};server=lmtest;database=lmdb;uid=mysqluser;pwd=pass;
```

## MySQL for Windows:

```
Driver={MySQL ODBC 3.51  
driver};server=lmtest;database=lmdb;uid=mysqluser;pwd=pass;
```

## Sample Connection Using DSN

If your driver uses DSN, the connection information in the `odbc.ini` file will be used to authenticate and connect to the database. No connection string is required; instead, indicate the Data Source Name. Example:

```
DSN=mysql
```

## Sample odbc.ini File

```
[ODBC Data Sources]  
[mysql]  
Driver = /usr/lib/libmyodbc3.so  
Description = MySQL on lmtest  
SERVER = lmtest  
USER = lmuser  
Password = pass  
OPTION = 3
```

## Sample Select Query

This query is connecting to a table called *info*. The *state* field has been added to the ListManager Members\_ table.

```
select info.email as EmailAddr ,  
info.status as MemberType ,  
info.state as state  
from info
```

## Important Notes

- The query may not include comments (e.g., `-- select a, b, c, d, e, g from numeric`)
- The query must be a *select* query. *Update*, *insert*, and **Delete** queries will not work.

## Troubleshooting Checklist

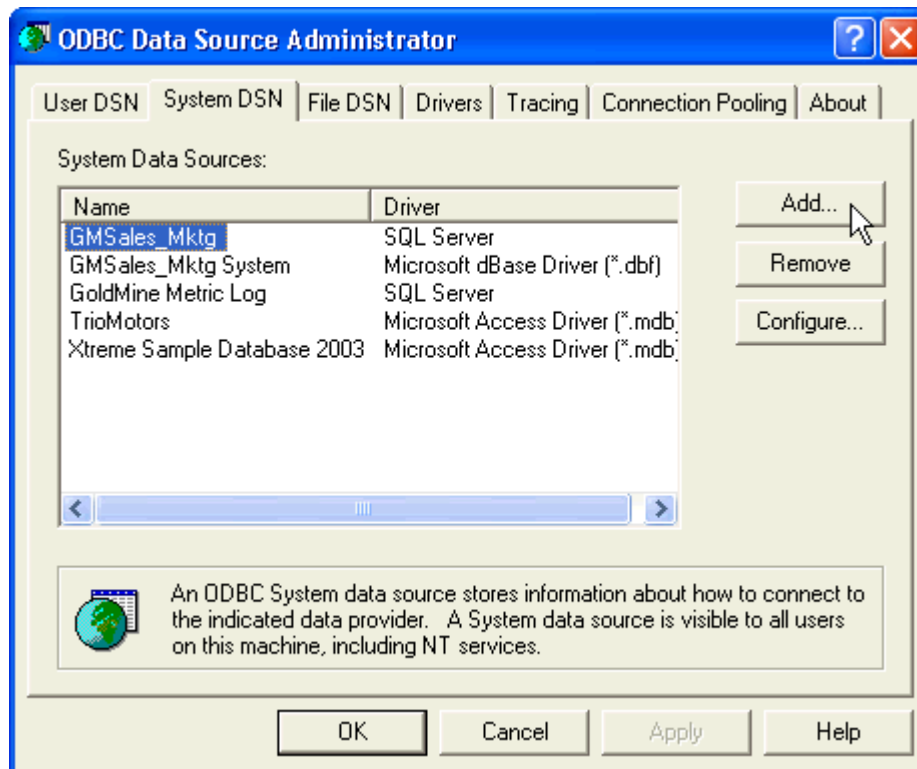
1. Make sure you have installed UnixODBC.
2. Make sure you have installed the correct driver.
3. Make sure you are using the correct libraries.
4. Make sure you are using the correct information to connect to the database.
5. If using DSN, be sure the `odbc.ini` file has the correct connection information.

# ODBC on Windows

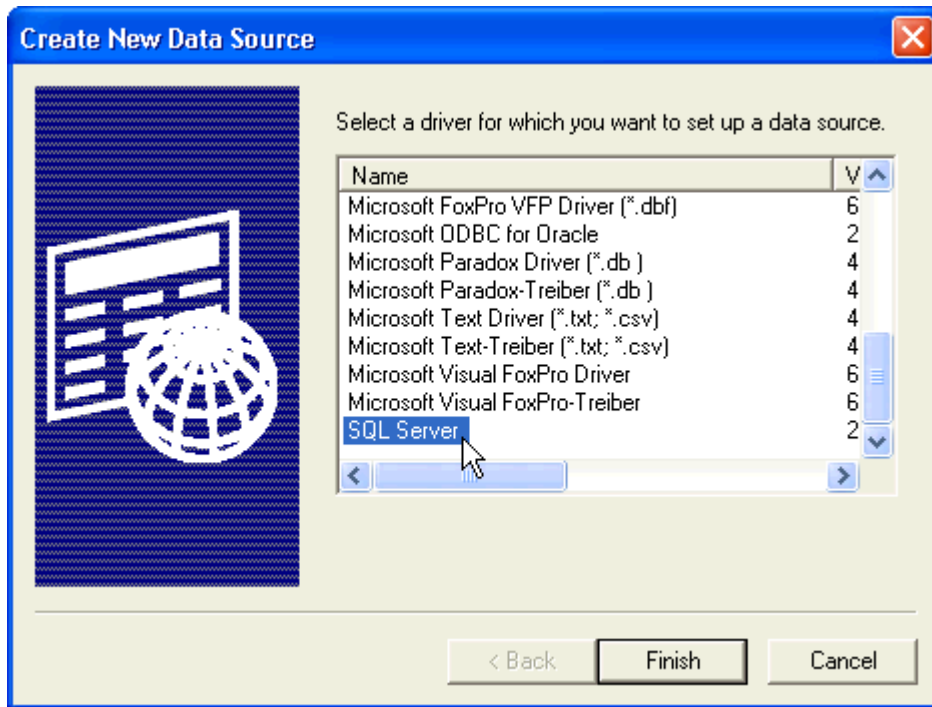
---

## ODBC for Importing/Syncing from MSSQL to MSSQL

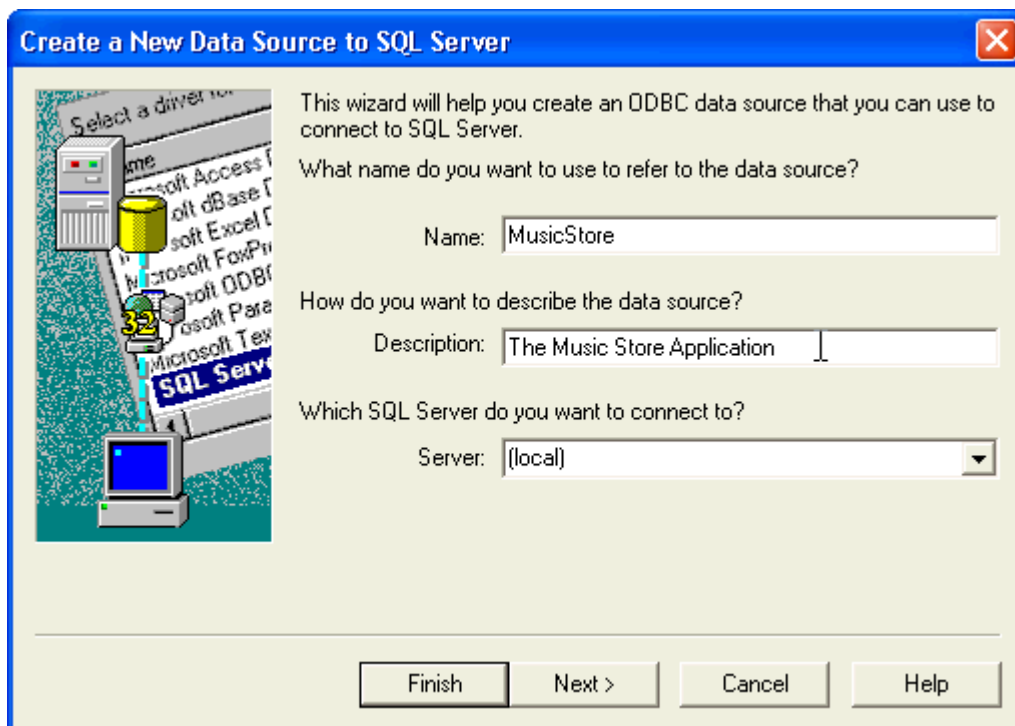
1. To open Data Sources (ODBC), click **Start**, point to **Settings**, and then click **Control Panel**.
2. Double-click **Administrative Tools**, and then double-click **Data Sources (ODBC)**.
3. Click the **System DSN** tab, and then click **Add**.



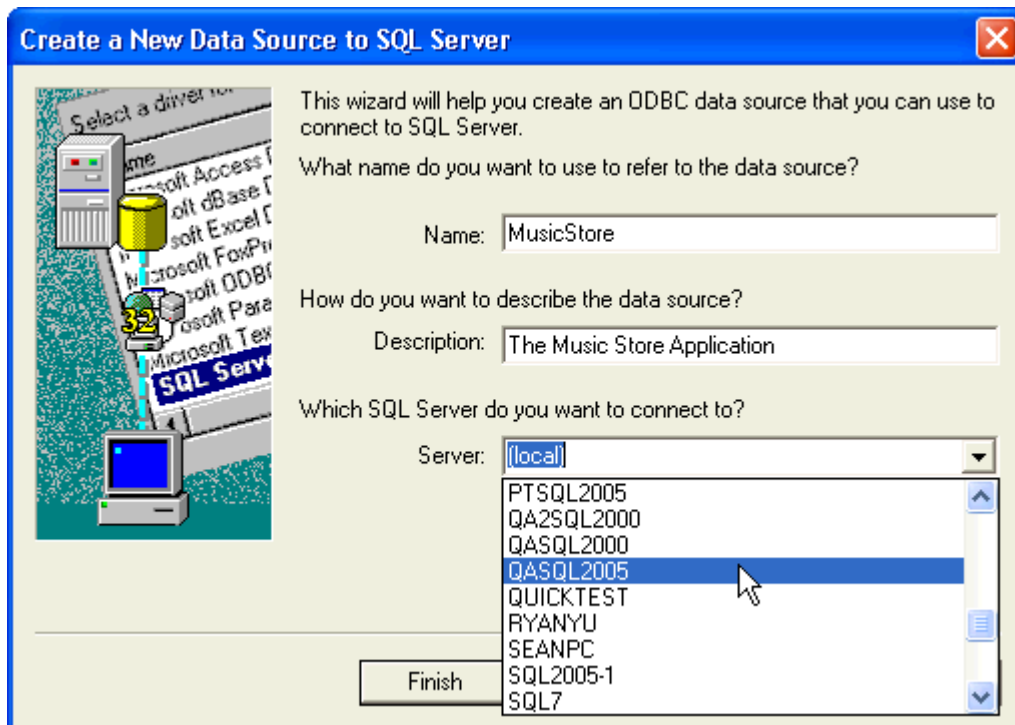
4. In the **Create New Data Source** dialog, click **SQL Server** (you may have to scroll down to see it), and then click **Finish**.



5. In the **Create a New Data Source to SQL Server** dialog, click the **Name** box, and then type the name you want. Do the same for the **Description** box.

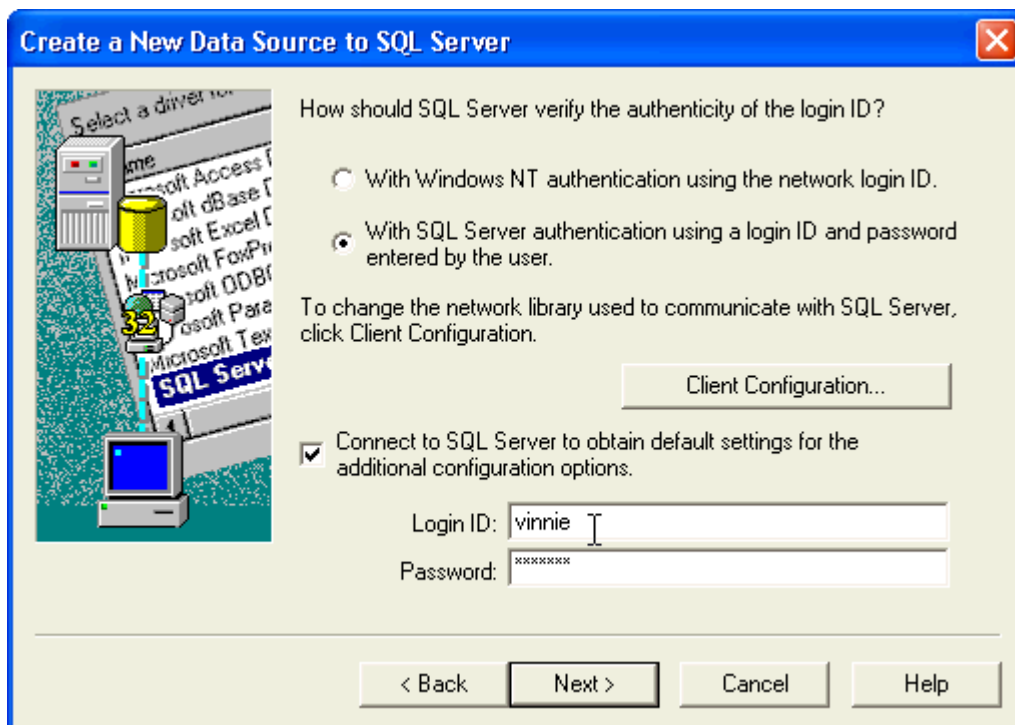


6. In the **Server** box, click the down arrow, and then select the server that hosts the database you entered in the **Name** box. When you are finished, click **Next**.



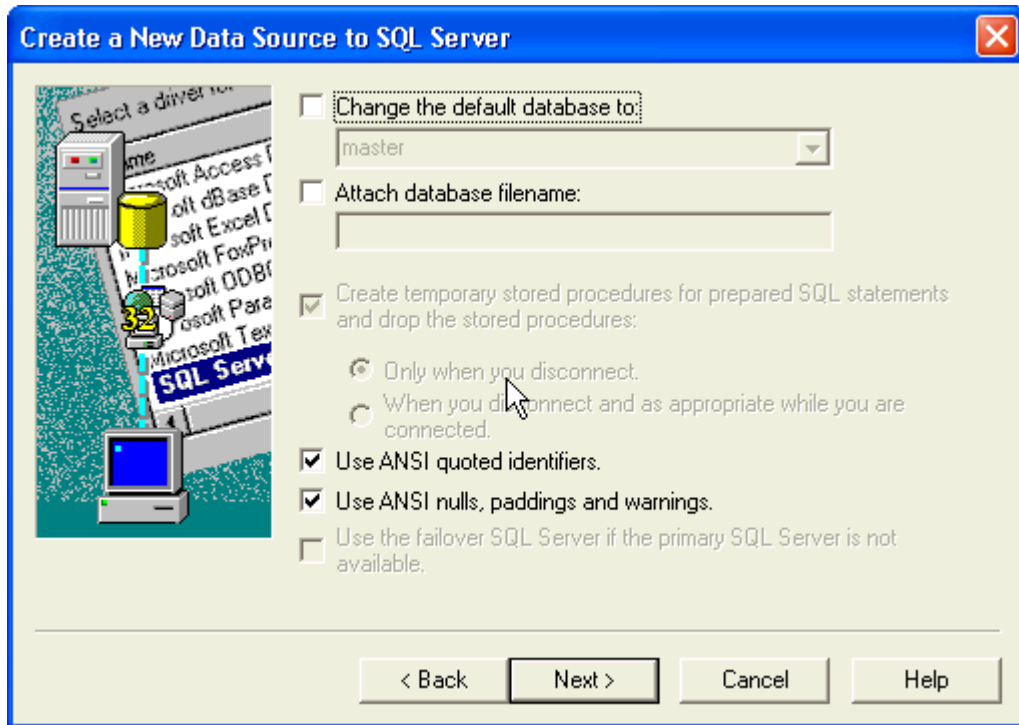
7. In the next dialog, select the option With SQL Server authentication using a login ID and password entered by the User.

8. Type in your **Login ID** and **Password**, and then click **Next**.

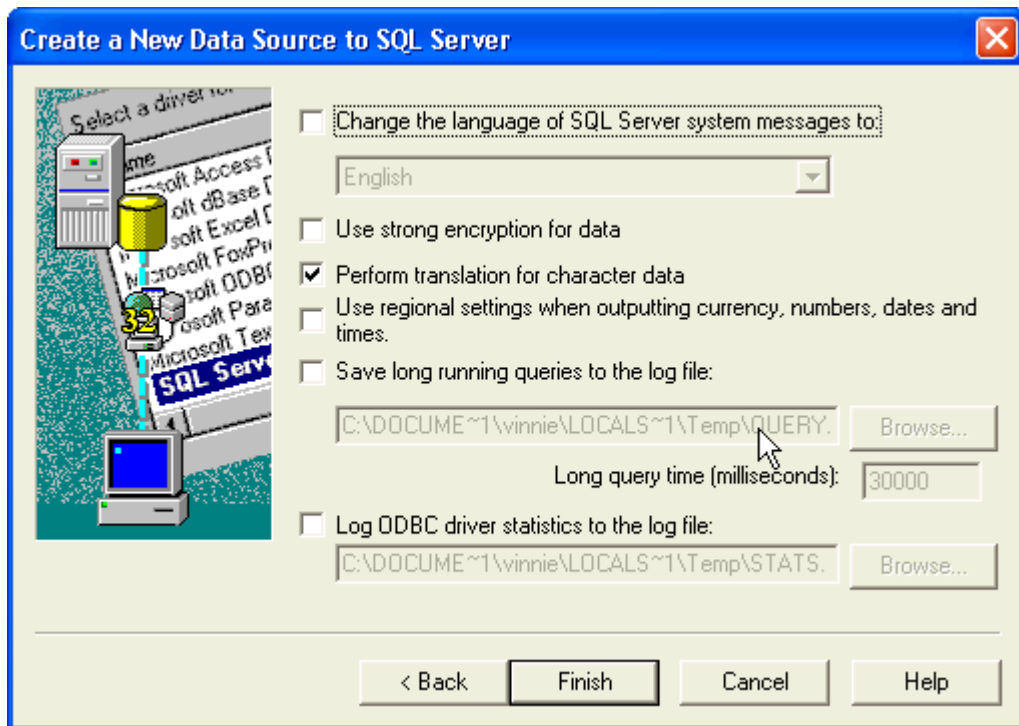




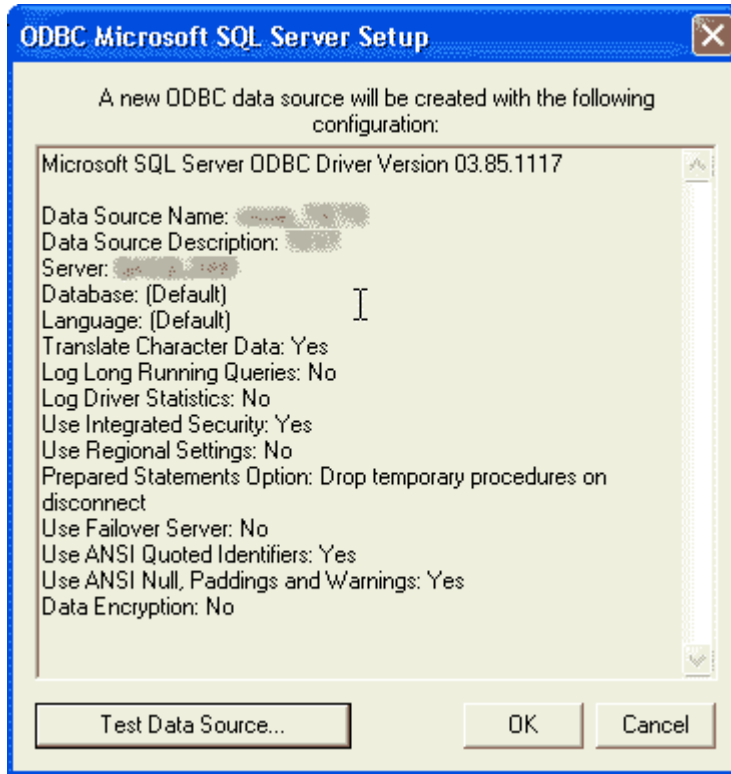
9. In the next dialog, make no changes. Click **Next**.



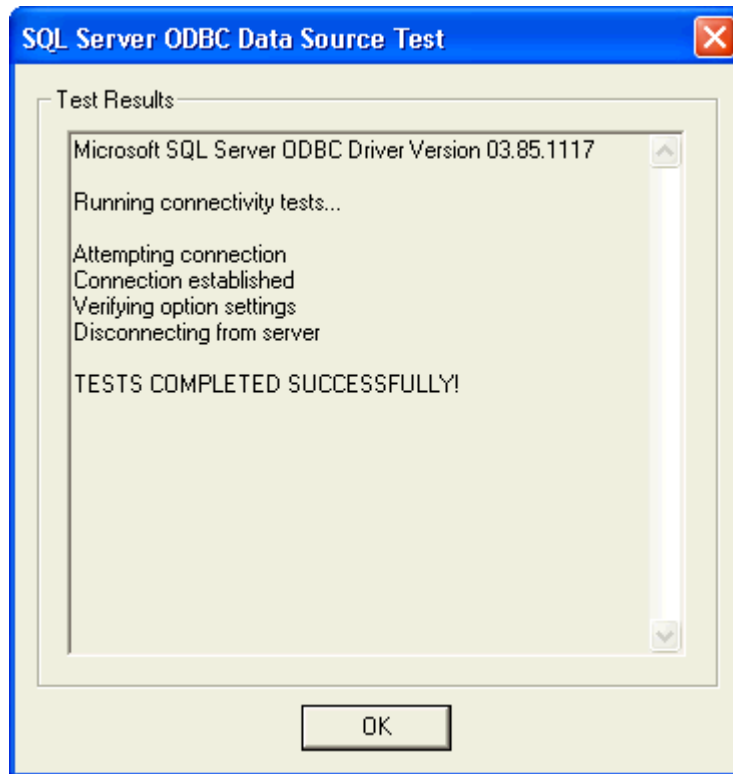
10. In the next dialog, make no changes. Click **Finish**.



11. A summary of your previous selections displays. To verify successful ODBC Data Source creation, click **Test Data Source**.



12. If you run a test and it is successful, a screen similar to the one below appears. Click **OK**.



## Sample ODBC Connection Strings and Queries

---

### MS SQL

Driver={SQL Server};Server=Imtest;Database=Imdb;Uid=sa;Pwd=pass

### Oracle

DSN=DSN\_Name;Server=Imtest;Uid=Imuser;Pwd=pass

### MySQL For Unix:

Driver={MySQL ODBC 3.51 driver};server=Imtest;database=Imdb;uid=mysqluser;pwd=pass;

### MySQL for Windows:

Driver={MySQL ODBC 3.51 driver};server=Imtest;database=Imdb;uid=mysqluser;pwd=pass;

### Sample Connection Using DSN

If your driver uses DSN, the connection information in the odbc.ini file will be used to authenticate and connect to the database. No connection string is required; instead, indicate the Data Source Name. Example:

```
DSN=mysql
```

### Sample odbc.ini File

```
[ODBC Data Sources]
[mysql]
Driver = /usr/lib/libmyodbc3.so
Description = MySQL on lmtest
SERVER = lmtest
USER = lmuser
Password = pass
OPTION = 3
```

### Sample Select Query

This query is connecting to a table called *info*. The *state* field has been added to the ListManager Members\_ table.

```
select info.email as EmailAddr ,
info.status as MemberType ,
info.state as state
from info
```

### Important Query Notes

- You must have permission to view the table in the query. If you do not have permission, you will see the following error message when you test the database connection:  
  
Test failed because of the following error:  
If SQL query does not contain EmailAddr\_ field, then it must contain both UserNameLC\_ and Domain\_ fields.
- The query must be a *select* query. *Update*, *insert*, and **Delete** queries will generally not work.
- Please *test* your query thoroughly before putting it into production.
- Do not update the password\_ field. The ListManager password\_ field is encrypted.

## Datatypes Supported During ODBC Synchronization

---

### SQL Server 2003/2005 Data Types

Name	Description
binary	Fixed-length binary data with a maximum length of 8,000 bytes.
text	Variable-length non-Unicode data with a maximum length of $2^{31} - 1$ (2,147,483,647) characters.
char	Fixed-length non-Unicode character data with a maximum length of 8,000 characters.
varchar	Variable-length non-Unicode data with a maximum of 8,000 characters.
smalldatetime	Date and time data from January 1, 1900, through June 6, 2079, with an accuracy of one minute.
datetime	Date and time data from January 1, 1753, through December 31, 9999, with an accuracy of three-hundredths of a second, or 3.33 milliseconds.
real	Floating precision number data with the following valid values: $-3.40E + 38$ through $-1.18E - 38$ , 0 and $1.18E - 38$ through $3.40E + 38$ .

decimal	Fixed precision and scale numeric data from $-10^{38} + 1$ through $10^{38} - 1$ .
numeric	Functionally equivalent to decimal.
money	Monetary data values from $-2^{63} (-922,337,203,685,477.5808)$ through $2^{63} - 1 (+922,337,203,685,477.5807)$ , with accuracy to a ten-thousandth of a monetary unit.
int	Integer (whole number) data from $-2^{31} (-2,147,483,648)$ through $2^{31} - 1 (2,147,483,647)$ .
smallint	Integer data from $-2^{15} (-32,768)$ through $2^{15} - 1 (32,767)$ .
tinyint	Integer data from 0 through 255.

## Oracle

External Datatype	C++ Type	OCCI Type
16 bit signed INTEGER *	signed short, signed int	OCCIINT
32 bit signed INTEGER *	signed int, signed long	OCCIINT
8 bit signed INTEGER *	signed char	OCCIINT
Binary LOB *	OCILobLocator	OCCI_SQLT_BLOB
CHAR *	char[n]	OCCI_SQLT_AFC
Character LOB *	OCILobLocator	OCCI_SQLT_CLOB
DATE *	char[7]	OCCI_SQLT_DAT
FLOAT *	float, double	OCCIFLOAT
FLOAT **	float	OCCIFLOAT
LONG *	char[n]	OCCI_SQLT_LNG
NATIVE DOUBLE *	double	OCCIBDOUBLE
NATIVE DOUBLE **	Bdouble, double	OCCIBDOUBLE
NATIVE FLOAT *	float	OCCIFLOAT
NATIVE FLOAT **	Bfloat, float	OCCIFLOAT
null terminated STRING *	char[n+1]	OCCI_SQLT_STR
NUMBER *	unsigned char[21]	OCCI_SQLT_NUM
RAW *	unsigned char[n]	OCCI_SQLT_BIN
UNSIGNED INT *	unsigned int	OCCIUNSIGNED_INT
UNSIGNED INT **	unsigned int	OCCIUNSIGNED_INT
VARCHAR2 *	char[n]	OCCI_SQLT_CHR

## Clustering

### Clustering ListManager

---

#### What is ListManager Clustering?

Multiple ListManager instances (or *nodes*) may be clustered together using a single database. Each node can perform all ListManager tasks: receive and send mail, accept and process clickthrough and other tracking, and perform scheduled tasks.

The benefits of a clustered ListManager environment are:

- **True load distribution** -- Any node can perform any task, including sending mail, receiving incoming mail, accepting tracking events or performing scheduled tasks.
- **Redundancy**-- If one node goes down for any reason, others will pick up the work.
- **No single point-of-failure** -- No single critical ListManager system must be working for the cluster to function (other than the database server).
- **Improved bounce processing speed** -- Processing and saving bounced mail in the database is faster.

### What happens when a ListManager node fails?

If a node is lost for whatever reason, the task the node was working on will be interrupted until the node is restored. If the node was delivering mail, no data will be lost, but some recipients will not receive mail until the node is restored. Depending on the sending speed of the lost node, the number of recipients delayed may be in the low thousands.

### What do I need to cluster ListManager?

In addition to the [hardware](#) and [software](#) requirements for a single ListManager installation, the following is also required:

- An MSSQL or Oracle database. ListManager clustering is not supported for MSDE.
- A separate database server with ample [hardware](#) to handle the load of multiple ListManager nodes. ListManager clustering is not supported when one of the ListManager nodes is on the same machine as the database server.
- A LAN. Clustering ListManager on a WAN is not recommended.
- Adequate [hardware](#) for each ListManager node. Each node must run on its own machine; two nodes may not run on the same machine. Optimally, the hardware should be the same for all ListManager nodes to make configuring the nodes easier, though not strictly required. Different nodes may use different platforms if connecting to an Oracle database.
- Clustering license(s): The serial code for additional ListManager nodes must be enabled for clustering. If a node has no license, or has a license for which clustering is disabled, it will be [disabled](#). Contact [sales@lyris.com](mailto:sales@lyris.com) for more information about purchasing clustering licenses.

### How difficult is it to use and administer a ListManager cluster?

A ListManager cluster should be largely transparent to users. The administrator may need to initially [configure](#) some IP and [DNS settings](#) for each node in the cluster, but otherwise administration of a cluster will not be significantly more difficult than administration of a single ListManager instance.

### Will I see increased sending speeds from a cluster?

Depending on the licenses, a cluster can potentially send out mail more quickly than mail from a single ListManager instance. However, keep in mind that ListManager cannot control how quickly ISPs will accept your mail. In some cases, an ISP will limit the number of inbound connections not just from a single IP address, but from an IP block or range.

### Where can I see the performance of nodes versus the cluster?

In Reports: Server Performance: Server Sending Speed, you may view charts displaying the attempted, successful, and failed messages per hour for individual nodes or for the cluster.

### **Can I cluster the database?**

ListManager does not include tools to run against multiple databases. However, your database may be clustered so that the database clustering is transparent to ListManager. Contact your database vendor for more information about database clustering.

### **Can there ever be conflicts?**

Normally, each node in a ListManager cluster will pick up tasks as they are created, and there will be no conflict between them. In rare instances, two moderated messages could be approved twice from two separate nodes, causing a posting to be sent twice. To eliminate the possibility of such mishaps, have list administrators use the interface from one of the nodes.

### **Important Clustering Notes**

- Message recipients may receive duplicate messages in a cluster if the same message is posted to multiple lists and/or segments. Duplicate messages will be received even if the list(s) are set so members will not receive crossposted duplicates.
- To send the same message to multiple lists and segments, send to each list and segment separately, purging out recipients of earlier messages on the [Mailings: New Mailing: Recipients](#) tab.
- Recency limits may also be ignored if a second mailing is approved before recipient list processing for the first has been completed.
- You may not select which node a message is sent from; ListManager distributes messages across the cluster automatically.

## **Installing, Upgrading and Uninstalling a Cluster**

Before installing a ListManager cluster or upgrading to a clustered ListManager server, be sure you have software licenses that allows clustering. Contact [sales@lyris.com](mailto:sales@lyris.com) if you have questions about your licenses.

### **Installing a ListManager Cluster**

When installing ListManager, the installer will prompt you as to whether the installation is a new installation, an upgrade or a node. For the first ListManager instance, select *New Install*. For the second and subsequent installations, select *Add Node to Cluster*.

The installation will proceed for each node as it does for a single instance of ListManager. You'll need to provide the same database connection information for each node installation as you did for your initial ListManager installation.

Once you have completed installing a node, be sure you [configure](#) it.

### **Upgrading a Cluster**

Before upgrading a cluster, please review the [important upgrade information](#) for this version.

### To upgrade a cluster

1. Shut down all ListManager nodes.
2. Upgrade the primary ListManager node (the first ListManager you installed) first.  
When prompted by the installer, select "upgrade."
3. Repeat the upgrade for each node.
4. Once the primary node has been upgraded, you may run ListManager on that node while upgrading the subsequent nodes.

### Moving a Node

To move a node to different hardware:

1. Shut down the machine the ListManager node is currently running on.
2. Open the file `lmcfg.txt` (located in `C:\Program Files\ListManager` or `~/ListManager/bin`) using a plain-text editor (such as Notepad or vi).
3. Note the value of `$node_name`.
4. Install ListManager on the new machine selecting *Add Node to Cluster*.
5. When asked for a serial code, you may either not provide one or use the one for the previous machine.
6. When the installation is complete, do not start ListManager.
7. Open the file `lmcfg.txt` (located in `C:\Program Files\ListManager` or `~/ListManager/bin`) using a plain-text editor (such as Notepad or vi).
8. Change the value `$node_name` to be the same name as the previous node.
9. Start ListManager. The new ListManager node will have the same settings as the previous node. If the IP addresses have changed, you may need to [configure the node](#).

### Uninstalling a Node

The process to [uninstall](#) a ListManager node is the same as uninstalling a single instance of ListManager. The database will still reference the other node in `lrcfgNodeSettings`, but the node will be disabled.

## Configuring a Node

---

A ListManager node should require little additional configuration after installation. Most of the settings in ListManager are common to all of the nodes in a cluster, so changing these settings through the web interface on one node effects the change for the entire ListManager cluster.

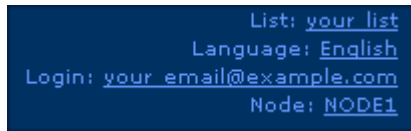
The settings that are specific to one node are in [Utilities: Administration: Server: Server Settings: Node Settings](#) and [Utilities: Administration: Sites](#). Note that the actual settings available do not change (that is, no additional settings are added as a result of clustering ListManager).

### Accessing a Node



The settings for a particular node can always be accessed by going to that ListManager node's web interface.

However, you may do most administration of additional nodes through the interface of any ListManager node. When ListManager is clustered, the node is indicated in the upper right hand corner of the interface. To change to a different node, click the node name.



A screenshot of a dark blue interface showing the following text in white: "List: [your list](#)", "Language: [English](#)", "Login: [your\\_email@example.com](#)", and "Node: [NODE1](#)".

You will then be shown a list of nodes, with an asterisk (\*) indicating the interface of the node you are logged into. Click the name of the node you'd like to configure. That node will now appear in the upper right hand corner of the interface. You may now access that node's settings.

Note that the interface will still be for the node you logged into. Statistics and logs in Utilities: Administration: Server: Operational Statistics and Debug Log will still be for that node.

You will be able to see the performance for individual nodes and the server as a whole in [Reports: Server Performance: Server Sending Speed](#).

Any changes made to a node may take several minutes to take effect until the node picks up the changes made.

### Node Settings

The server settings for a particular node are in [Utilities: Administration: Server: Server Settings: Node Settings](#); all other server settings are shared by all ListManager nodes.

In the Node Settings, you may change or enter your license code, set limits for this node, and select IP addresses it should use (if there are multiple IP addresses for the machine). By default, the node will be set to use up to the limit set by its license, and any IP address on the machine.

### Site Settings

If you have one site, it is likely that no changes will be necessary to the site's settings, though you will want to check that the correct Internet host name and URL to web interface are being used.

If you have multiple sites, it is recommended that you assign a dedicated IP address to each site on each node, so each site may have its own SMTP (and NNTP) banner. If multiple sites are using the same IP address, you should configure the sites to use the same banners so the banner specific to one site is not used for another. See [Utilities: Administration: Sites](#) for more information about sites and their configuration.

## Load Balancing a Cluster

---

## Load Balancing Outbound Mail and Scheduled Tasks

ListManager automatically balances the load between nodes for scheduled tasks and outbound mail. Administrators may restrict outbound mail for a particular node by modifying the settings in [Utilities: Administration: Server: Server Settings: Node Settings: Limits](#). You may not specify which particular node processes an outbound message.

## Load Balancing Incoming Tasks

ListManager does not automatically load balance incoming tasks (incoming mail or tracking).

Lyris recommends you use a hardware load balancing device for true incoming load balancing.

DNS entries may also be used to round-robin incoming mail and web traffic between different nodes, in effect balancing the load between them. However, some client software (e.g., web browsers) may cache DNS results for one node and ignore others until the machine is rebooted.

### Use DNS to Balance HTTP and NNTP

To round-robin incoming HTTP and NNTP, DNS entries may be created directing web traffic to multiple ListManager nodes.

For example, if two nodes, node1 and node2 are handling tracking for the domain server.example.com, two A records can be made for server.example.com pointing to the IP addresses for node1 and node2:

```
server.example.com. IN A 172.16.0.1
server.example.com. IN A 172.16.0.2
```

In the above example, web traffic to server.example.com will be distributed in a round-robin fashion between these two IP addresses.

Note that your operating system may cache DNS lookup information so that you will always be taken to the same node. Either turn off DNS caching or use different machines to test.

### Use DNS to Balance Incoming SMTP

To round-robin incoming mail (e.g. subscription requests and error mail), DNS entries may be created directing web traffic to multiple ListManager nodes.

For example, if two nodes, node1 and node2 are handling mail for server.example.com, two MX records can be made for server.example.com:

```
server.example.com. IN MX 10 node1.example.com
server.example.com. IN MX 10 node2.example.com
```

In the above example, both node1 and node2 have the same priority, so mail will be distributed to them equally. If one node should receive less incoming mail than the other (e.g., because of hardware differences), change the priority. For example, if node2 should receive mail only if node1 is busy, the following MX records should be made:

```
server.example.com. IN MX 10 node1.example.com
server.example.com. IN MX 50 node2.example.com
```

# Switching from Another List Management Program

## Importing Email Addresses

---

If you are switching from another list manager program to ListManager, you will probably want to import into ListManager the email addresses of your list members.

The easiest way to import members is from the Members: Add Members page. There, you have the option to [create a single member](#), [create many members](#), and to [import members from a file](#).

Another method is to add members using an email command sent to the ListManager server. See [Adding Many Members](#) for more information on how to use this method.

You may also import the data directly into your SQL server using tools provided by your SQL server. This method loads data most quickly, averaging speeds of 100,000 members per hour, but is less flexible about how the data may be formatted.

Note that the total number of members you may have on your server is determined by your license. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to increase the number of members you may have.

## Using Native SQL Imports

---

Importing data directly into SQL Server is the fastest way to get your members added to the ListManager database. The following fields should be imported or otherwise filled in the ListManager members\_ table:

EmailAddr\_ — the recipient's email address  
Domain\_ — everything after the @ sign in lower case  
UserNameLC\_ — everything before the @ sign in lower case  
List\_ — the name of the list the address should be assigned to

Your SQL database server provides many methods to import data. You should use the program that you feel most comfortable with to accomplish this task.

Documented below is one method that uses the program “BCP” that ships with Microsoft SQL Server. This Bulk Copy Program reads a format file to know how to read the data file, and then rapidly adds data to the SQL Server.

The data below gives an example of a format file. In this example the absolute minimum number of columns is provided to load data into the members table. In this case, the EmailAddr field is the only one required, and the rest will be defaulted or auto-computed by the SQL Server.

This example should not serve as a substitute for the documentation provided by Microsoft for the BCP utility.

In this case BCP is expecting a file with a single email address that is no more than 100 bytes long and is terminated by \r\n. If you want to bulk load additional columns of data into the member table you can add columns to this format file.

```
7.0
1
1 SQLCHAR 0 100 "\r\n" 11 EmailAddr_
```

The basic arguments to the BCP program are:

```
BCP members_ in Members.TXT -fmembers.fmt -Sserver -Uuser -Ppassword
```

Where:

members\_ is the name of the members table.

Members.TXT is the text file with email addresses separated by \r\n.

members.fmt is the name of the format file described above.

Server is your server name

User is your user name on that server that has rights to bulk-copy into the database

Password is the password for this user (if any).

There are other arguments to BCP that may apply to your situation. Please consult the provided documentation from Microsoft for further details.

### **Using DTS to Import to Microsoft SQL Server**

There is a bug in DTS that prevents CSV files with identity columns from being imported. The workaround is detailed here:

<http://support.microsoft.com/default.aspx?scid=kb;EN-US;q246310>

It involves importing the data into MS Access, mapping the Access columns to the SQL server columns, and then doing the import.

The second example is the example that relates directly to the ListManager members\_ table.

An easier way to import CSV data is to use the [Members: Add Members: Import Members from CSV File](#) feature.

## **Installation Troubleshooting and FAQ**

### **Problems Starting the ListManager Server**

---

If, when starting ListManager, you instead receive an error message about "invalid host" then the problem is likely with your TCP/IP machine name configuration.

This problem is usually caused by an incomplete DNS configuration. In order for ListManager to work, the TCP/IP host name on your machine must exist on your DNS server, and the TCP/IP addresses that your machine uses must themselves have names. In technical-lingo, this means that you need both "forward and reverse DNS lookups" installed on your system.

Check the hostname/domain name that you have set in your TCP/IP configuration. Make sure that you can ping this full name, both from your machine and from another machine. You must have a DNS entry for your machine on your DNS server. This hostname/domain-name setup is usually the cause of your problem.

If you have multiple TCP/IP addresses, make sure that the first TCP/IP address on your system has a DNS name entry.

With the program "nslookup.exe" (nslookup on UNIX), you can check to see if DNS entries are set up correctly. If you do not have "nslookup.exe" on your computer, you can download it from: <ftp://ftp.lyris.com/listmanager/scripts/nslookup.exe>

If your computer is named "fia.yourcompany.com", you would type:  
nslookup fia.yourcompany.com

And nslookup will respond with:

```
C:\>nslookup fia.yourcompany.com <- this is what you type
Server: kuno.yourcompany.com <- this is your DNS server
Address: 207.105.6.156 <- this is your DNS server
Name: fia.yourcompany.com <- this is your host name
Address: 207.105.6.147 <- your tcp/ip address
```

If your DNS is not set up correctly, this forward lookup will say:

```
*** kuno.yourcompany.com can't find fia.yourcompany.com: Non-existent
host/domain
```

If it did work and you did not get an error message, now do a "reverse lookup" by typing the TCP/IP address of your machine. For example, if the TCP/IP address of your machine is "207.105.6.147", you would type:

```
C:\>nslookup 207.105.6.147 <- this is what you type
Server: kuno.yourcompany.com <- this is your DNS server
Address: 207.105.6.156 <- this is your DNS server
Name: fia.yourcompany.com <- your host name
Address: 207.105.6.147 <- your tcp/ip address
```

If your DNS is not set up correctly, the reverse lookup will say:

```
*** kuno.yourcompany.com can't find 207.105.6.147: Non-existent host/domain
```

If you do have a DNS problem, you should contact the person responsible for your DNS. In most cases, this is your Internet Service Provider. Once this is fixed, ListManager will work correctly for you.

If you have multiple TCP/IP addresses, and only want ListManager to use some of them, see the next section, "[Problems with Multiple TCP/IP Addresses](#)".

## What is the TCP/IP check for?

---

The TCP/IP check looks to see if you are running a web server and/or an email server, retrieves your host name and TCP/IP address, and checks that your domain name server has a TCP/IP entry for your hostname. Some of this information is used by Setup to self-configure ListManager for your system, and other information is used to verify that your TCP/IP configuration is correct.

## Do I need a Mail Server to run ListManager?

---

No, you do not.

ListManager has its own mail server built-in and does not need to use another mail server. In fact, the mail engine included with ListManager is much faster than most any other mail package available, so by using a different mail engine to deliver mail you will actually be slowing down the performance of ListManager.

ListManager can receive and send Internet email on its own. If you want to run ListManager on a machine that already has a mail server installed, please see "[Mail Server Coexistence](#)".

## Problems with Multiple TCP/IP Addresses

---

If you have multiple TCP/IP addresses on a machine running ListManager, you may need to configure ListManager to use particular IP addresses for particular tasks.

For example, if you have three TCP/IP addresses, say:

207.90.101.4  
207.90.101.5  
207.90.101.6

You may want to configure ListManager so each site uses a particular IP address for incoming and outgoing SMTP and NNTP connections. Or, you may want to specify a particular IP address because others on the machine do not have internet access. This may be configured in [Utilities: Administrations: Sites: Edit Site: SMTP](#) and [NNTP](#).

In some situations, not all IP addresses on a machine have access to the internet for DNS lookups. The IP address ListManager uses to connect to the Internet for DNS lookups may be configured in [Utilities: Administration: Server: Server Settings: Machine/Node Settings: IP Addresses: DNS IP Address](#).

## ListManager Does Not Respond to Email I Send to It

---

If, when you send mail to ListManager, you never receive a response, it is likely that ListManager is not receiving your message. In such a case, it is most likely that your Domain Name Service information is set up incorrectly and that your mail program is actually sending your mail elsewhere.

Very often, the DNS for your organization has been set up so that email sent to a specific machine is routed to a mail server rather than to that specific machine. For instance, the "mail preference" setting for a machine named "alpha.yourcompany.com" could be set up so that mail to "listmanager@alpha.yourcompany.com" is instead sent to "listmanager@mailserver.yourcompany.com". In such a case, the mail never gets to alpha.yourcompany.com (the machine running ListManager). That, of course, causes problems.

If you are sure that your DNS is set up correctly, here is how you peek into ListManager to see what it happening to incoming mail.

If you have the programs and the knowledge to access your SQL Server directly you can look in your database at the table called inmail\_, and all messages that ListManager has received will be there, along with their processing "status".

Here is a sample, correctly set up DNS entry. Notice how "mail exchanger" with the lowest preference (preference = 5) is the machine itself. This DNS is set up so that any mail to jingram.clark.net is sent directly to jingram.clark.net. The preference=10 line indicates that if for some reason the preference=5 host is not available (perhaps it is turned off) then mail will be accepted by clarknet.clark.net, who will most likely hold the mail and deliver it to jingram.clark.net once that host is once again reachable.

```
> jingram.clark.net
Server: clark.net
Address: 168.143.0.7
jingram.clark.net Internet address = 168.143.7.97
jingram.clark.net preference = 5, mail exchanger = jingram.clark.net
jingram.clark.net preference = 10, mail exchanger = clarknet.clark.net
clark.net nameserver = sun1.clark.net
clark.net nameserver = icm1.icp.net
jingram.clark.net Internet address = 168.143.7.97
clarknet.clark.net Internet address = 168.143.0.2
sun1.clark.net Internet address = 198.17.243.2
icm1.icp.net Internet address = 192.94.207.66
```

## Hard Disk Defraggers

---

Several people have reported complete system crashes (blue screen of death, reboot) on Windows when running a hard disk de-fragmenter while the ListManager is busy.

One person had their defragmenting utility use up all available system memory, thus, making it impossible to shut the server down or even terminate the task.

For this reason, we do not recommend defragmenting your hard disk while the ListManager server is running.

## Can ListManager work on an Intranet?

---

Can ListManager work on an Intranet, with no connection to the Internet?

Yes, ListManager will work fine on an Internet TCP/IP based network. A connection to the Internet is not required, as long as you are only using ListManager inside your network.

## Bus Error on Unix

---

If, when you run the "lm" executable, ListManager crashes with a "bus error", "segment violation", or some sort of library error, it is likely that the version of your Unix operating system has not had all the Unix vendor's OS patches applied to it.

## Problems with McAfee Netshield

---

If you are installing ListManager when running McAfee Netshield, you may have problems starting the ListManager web server. To resolve this issue, stop McAfee Netshield, start the ListManager web server, and then restart McAfee Netshield.

## tcl Macros and Merge Tags

---

On startup, ListManager loads the functions provided by specific Tcl files in the tclweb/lib/lm\ directory (tclweb/lib/lm/ on Linux) into memory. These files provide some of the Tcl macros and merge tags used by the mail merge functionality of ListManager. These files are overwritten during upgrades. Users have the ability to add a file called "tclCustom.tcl", which is also sourced on ListManager startup (if it exists), which is provided as a repository for user defined custom Tcl code. The tclCustom.tcl file will persist between upgrades, so it is the ideal location for self-developed custom Tcl code for use in the merge process, or for custom complaint handler or autoresponder code. By adding a snippet of code, e.g.

```
proc lyrisname {} {  
  return "LYRIS" }
```

a new merge tag %%lyrisname%% will come into existence (after ListManager is restarted).



# Upgrading ListManager

## Important Upgrade Information

## Important Upgrade Information

---

### Upgrading and Your License

Your ListManager license controls what version you may run or the date up to which you may upgrade your ListManager version. To determine if you are allowed to upgrade to the current version of ListManager, check **Max Version** and **Last Day to Upgrade** in [Utilities: Administration: Server: Operational Statistics: License Capabilities](#).

Back up your database and test before upgrading. If you encounter a problem while doing the actual upgrade, you may not be able to recover your data without a backup.

## Preparing to Upgrade

---

Be sure you also read [Important Upgrade Information](#).

### 1. Backup Your Database

Please backup your database before upgrading ListManager. If a problem occurs during installation, you may not be able to recover your data without a backup. For more information about how to back up MSDE, see [Backing Up MSDE](#). For other databases, please consult your vendor's documentation.

### 2. Check Your Database Size

The current database structure for outgoing mail requires more space than versions 7.8 and earlier. Before upgrading, check to see that you have sufficient room in your database to perform the upgrade successfully. Note that database size for MSDE is limited to 2 gigabytes.

If your database is close to its size limit, or you are concerned about the upgrade taking too long, you may reduce the size of the outmail\_ table by taking the following steps:

1. In the left Navigation bar, click [Utilities: Administration: Server: Server Settings: Automatic Maintenance: Purging Old Data](#).
2. Set **Clean Outgoing Mail Queue** to 1. (0 keeps this data forever).
3. Click **Save**.
4. In the left Navigation bar, click [Utilities: List Settings: Automatic Maintenance: Purging Archives](#).

5. Set **Keep Mailing and Clickthrough Data for How Many Days** to 1 (0 keeps this data forever). Note that reducing the length of time you keep this data will limit mailing and member action reporting data to the length of time you specify.
  6. Click **Save**.
  7. Wait one night before performing the upgrade. ListManager will automatically reduce the size of your database as part of its nightly maintenance processes.
- If you are concerned about the upgrade taking too long, you may also choose to shorten the lyrMetricEvents table, where ListManager stores performance data. This table may contain millions of rows, and it may take several hours to upgrade this table.

To limit the amount of data in this table:

8. In the left Navigation bar, click [Utilities: Administration: Server: Server Settings: Automatic Maintenance: Purging Old Data](#).
9. Set **Purge Old Metric Events** to 1 (0 keeps this data forever).
10. Click **Save**.
11. Wait one night before performing the upgrade. ListManager will automatically reduce the size of your database as part of its nightly maintenance processes.

### 3. Test Before Upgrading

We recommend that you evaluate ListManager on a [test machine](#). If you prefer to use your [production ListManager server](#), only do so if you plan to upgrade it to the current version.

DO NOT use the release on your production server if you might want to go back to an older version of ListManager. Once you upgrade, you will not be able to downgrade back to the older version.

### 4. Get a Serial Number

You can use the MSDE version of ListManager with the standard feature set without a Serial Number in a limited capacity (200 members max, MSDE installed locally).

If you want to test a larger or external database, evaluate the "Pro" feature set, or connect ListManager to Microsoft SQL Server or Oracle, please contact your account representative to obtain an evaluation Serial Number.

Serial codes from versions 4.2 and lower are no longer valid, so contact an account representative to purchase an upgrade and to receive a new serial code. Your account representative can also tell you if your serial code allows you to upgrade to the current version.

To determine if you are allowed to upgrade ListManager, check **Max Version** and **Last Day to Upgrade** in [Utilities: Administration: Server: Operational Statistics: License Capabilities](#).

### 5. Stop Web Server on ListManager Machine

ListManager uses the ListManager web server included with ListManager. ListManager's web server may coexist with your web server, and will be installed on a higher port if port 80 is taken.

### 6. Open Firewall for ListManager DNS Resolver

ListManager uses its own DNS resolver. If you have a firewall, you must configure it so that ListManager can resolve DNS on port 53. If you have a firewall and you are upgrading from an earlier version, we HIGHLY recommend testing ListManager on a development server before you upgrade your production server to ensure ListManager can perform its DNS resolutions properly. See [Your Firewall and ListManager](#) for more information.

## 7. Review Database Table Changes

The old words\_ table will no longer be available after upgrading, which may affect some custom programs. For more information about the new database table structure, see the [Programmer's guide](#).

---

# Reducing Upgrade Time

---

If you are upgrading from ListManager 9.1 or 9.1A to 9.3, you can reduce upgrade time by creating several indexes while ListManager is still running. These indexes will not be recreated during the upgrade so it will take less time to complete. If you do not create these indexes, the upgrade will create them.

Here are the indexes and SQL statements needed to create them while ListManager is up and running:

## MSSQL

### Upgrading MSSQL from 9.1 to 9.3

```
DROP INDEX lyrCompletedRecips.IX_CompletedRecipsMemberID;  
CREATE INDEX IX_CompletedRecipsMemberID ON lyrCompletedRecips (MemberID,  
FinalAttempt, CompletionStatusID, MailingID);
```

```
CREATE INDEX IX_lyrMemComplaintLog_MsgID ON lyrMemberComplaintLog  
(MessageID);
```

```
CREATE INDEX IX_members_IsListAdm ON members_ (IsListAdm_, List_);  
CREATE INDEX IX_members_List_NotifySubm ON members_ (List_, NotifySubm_);
```

```
CREATE INDEX IX_referrals_RecvrMemberID_ ON referrals_ (ReceiverMemberID_);
```

### Upgrading MSSQL from 9.1a to 9.3

```
CREATE INDEX IX_lyrMemComplaintLog_MsgID ON lyrMemberComplaintLog  
(MessageID);
```

```
CREATE INDEX IX_members_IsListAdm ON members_ (IsListAdm_, List_);  
CREATE INDEX IX_members_List_NotifySubm ON members_ (List_, NotifySubm_);
```

```
CREATE INDEX IX_referrals_RecvrMemberID_ ON referrals_ (ReceiverMemberID_);
```

## Oracle

### Upgrading Oracle from 9.1 to 9.3

```
DROP INDEX lyrCompletedRecips.IX_CompletedRecipsMemberID;  
CREATE INDEX IX_CompletedRecipsMemberID ON lyrCompletedRecips (MemberID,  
FinalAttempt, CompletionStatusID, MailingID);
```

```
CREATE INDEX IX_lyrMemComplaintLog_MsgID ON lyrMemberComplaintLog  
(MessageID);
```

```
CREATE INDEX IX_members_IsListAdm ON members_ (IsListAdm_, List_);  
CREATE INDEX IX_members_List_NotifySubm ON members_ (List_, NotifySubm_);  
DROP INDEX IX_members_MemberType;  
CREATE INDEX IX_referrals_RecvrMemberID_ ON referrals_ (ReceiverMemberID_);
```

### Upgrading Oracle from 9.1a to 9.3

```
CREATE INDEX IX_lyrMemComplaintLog_MsgID ON lyrMemberComplaintLog  
(MessageID);
```

```
CREATE INDEX IX_members_IsListAdm ON members_ (IsListAdm_, List_);  
CREATE INDEX IX_members_List_NotifySubm ON members_ (List_, NotifySubm_);
```

```
CREATE INDEX IX_referrals_RecvrMemberID_ ON referrals_ (ReceiverMemberID_);
```

## Upgrade Instructions

### Upgrading ListManager from v4.2.1 or Lower

---

If you attempt to upgrade 4.2.1 to 10.0 directly, your data will not be copied correctly to the new database. To perform this upgrade, you must go through the upgrade process three times:

1. Upgrade 4.2.1 to 7.0.
2. Upgrade 7.0 to 8.9c.
3. Upgrade 8.9c to 9.3D.
4. Upgrade 9.3D to 10.0.

**NOTE** Lyris Technologies no longer tests upgrades from versions 6.1 and earlier.

Previous versions of ListManager can be found here:

<http://www.lyris.com/products/listmanager/archives.html>

Be sure you read [Important Upgrade Information](#) and [Preparing to Upgrade](#) first.

### Preparing Your Data

ListManager 5.0 and higher no longer uses FoxPro as its database format; see [Supported Platforms](#) for a list of databases you may use with ListManager.

We recommend you perform a "dbupgrade" before upgrading. To perform dbupgrade, stop ListManager, and open a command prompt. Cd to the directory which contains lyris.exe. Type:

```
lyris dbupgrade
```

Dbupgrade may take several hours, depending on the size of your data.

Be sure to back up your "db" directory (found in your Lyris directory) before upgrading.

Special Note: If you are upgrading from 4.x and using the embedded database MSDE, check the total size of your db directory. MSDE is limited to 2 GB for all its tables, so if you have too much data, the upgrade will not succeed. Your account representative can tell you more about external databases you can use with ListManager.

### Upgrading ListManager

Be sure that ListManager is not running when you upgrade it.

1. Shut down ListManager and the ListManager web server.
2. Double click on the ListManager installer icon.
3. Upgrade to v7.0: When running the ListManager installer, select "upgrade" instead of "new install", and provide the installer with the path where ListManager is currently installed. The installer will automatically copy the data if necessary and upgrade the database.

**NOTE** Upgrading the database may take several hours, depending on the size of your data.

4. Shut down ListManager if you started it after the installation.
5. Set your serial code on the command line with the following command:

```
lm serial yourcode
```

6. Run the ListManager installer three more times, first to upgrade to v8.9c, then to v9.3D, and then to 10. Select "upgrade" each time.
7. When the installation is complete, start ListManager.

# Upgrading ListManager 5.0 through 6.1

---

The upgrade process to ListManager 10 varies depending on which version you are currently using. Previous versions of ListManager can be found here:

<http://www.lyris.com/products/listmanager/archives.html>

## To upgrade from v5 through v6.1

1. Upgrade to v7.0
2. Upgrade from v7.0 to v.8.9c.
3. Upgrade from v8.9c to v9.3D.
4. Upgrade from 9.3D to 10.

**NOTE** Lyris Technologies no longer tests upgrades from versions 6.1 and earlier.

Previous versions of ListManager can be found here:

<http://www.lyris.com/products/listmanager/archives.html>

Be sure you read [Important Upgrade Information](#) and [Preparing to Upgrade](#) first.

It is recommended that you back up your database before upgrading. For information on backing up MSDE, see [Backing Up MSDE](#). For other databases, please consult your vendor's documentation.

## Upgrading ListManager: Windows.

1. Shut down ListManager and the ListManager web server.
2. Double click on the ListManager installer icon.
3. Upgrade to v7.0: When running the ListManager installer, select "Upgrade" instead of "New Install," and provide the installer with the path where ListManager is currently installed. The installer will automatically copy the data if necessary and upgrade the database.

**NOTE** Upgrading the database may take several hours, depending on the size of your data.

4. Allow the installer to start ListManager and the ListManager web server.
5. Close ListManager and the Listmanager web server, and then upgrade three more times according to the instructions listed at the beginning of this topic.

## Upgrading ListManager: Linux

1. Shut down ListManager and the ListManager web server.
2. Untar and unzip the ListManager installer.
3. Cd to the directory created by the ListManager installer.

4. Run the following command to start the installer:

```
./install_lm.pl
```

5. Upgrade to v7.0: When running the ListManager installer, select "Upgrade" instead of "New Install", and provide the installer with the path where ListManager is currently installed. The installer will automatically copy the data if necessary and upgrade the database.
6. Allow the installer to start ListManager and the ListManager web server.
7. Close ListManager and the ListManager web server, and then upgrade three more times according to the instructions listed at the beginning of this topic.

For details on upgrading ListManager on by hand instead of using the `install_lm.pl` script, see [Upgrading by Hand--Linux](#).

---

## Upgrading from ListManager 7.x

---

### To upgrade from v.7x

1. Upgrade to v8.9c.
2. Upgrade from v8.9c to 9.3D.
3. Upgrade from 9.3D to 10.

### Upgrading ListManager--Windows

1. Shut down ListManager and the ListManager web server.
2. Double click on the ListManager installer icon.
3. Upgrade to v8.9c: When running the ListManager installer, select "Upgrade" instead of "New Install", and provide the installer with the path where ListManager is currently installed. The installer will automatically copy the data if necessary and upgrade the database.

**NOTE** Upgrading the database may take several hours, depending on the size of your data.

4. Allow the installer to start ListManager and the ListManager web server.
5. Close ListManager and the ListManager web server, and then upgrade two more times according to the instructions listed at the beginning of this topic.

### Upgrading ListManager: Unix

1. Shut down ListManager and the ListManager web server.
2. Untar and unzip the ListManager installer.
3. Cd to the directory created by the ListManager installer.

4. Run the following command to start the installer:

```
./install_lm.pl
```

5. Upgrade to v8.9c: When running the ListManager installer, select "Upgrade" instead of "New Install", and provide the installer with the path where ListManager is currently installed. The installer will automatically copy the data if necessary and upgrade the database.
6. Allow the installer to start ListManager and the ListManager web server.
7. Close ListManager and the ListManager web server, and then upgrade two more times according to the instructions listed at the beginning of this topic.

For details on how to upgrade ListManager on Unix, see [How to Upgrade ListManager by Hand](#).

## Upgrading and Your Database Server

Starting with v7.8, ListManager's database structure was optimized to be more scalable. These changes will make mailing speeds on database servers with sufficient hardware faster than ever. However, underpowered database servers may have performance problems. Before upgrading from v7.6 or earlier, see [Requirements and Recommendations](#) to determine whether your database server meets the requirements.

ListManager also uses more database space than previous versions, and the upgrade may take a long time to perform. See [Preparing to Upgrade](#) for instructions about how to reduce the size of your database before upgrading.

### Notes

- ListManager 7.5 and above no longer support the Perl-based web interface that was shipped with previous versions of ListManager. This also includes LCP, which may have been used to create custom scripts. If you have been using the old interface extensively or use custom scripting to run certain portions of ListManager prior to ListManager 7.5 (including list member signup forms), please contact support prior to upgrading.
- New tables created by ListManager in MSSQL will be owned by DBO. In versions before 8.1, the ListManager tables were owned by the user.

---

## Upgrading from ListManager 8.x

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MSDE, MSSQL, and Oracle

**To upgrade to v10 from v8.x**

1. Upgrade to 9.3D.
2. Upgrade from 9.3D to 10.



## Upgrading ListManager--Windows

1. Shut down ListManager and the ListManager web server.
2. Double click on the ListManager installer icon.
3. Upgrade to 9.3D: When running the ListManager installer, select "Upgrade" instead of "New Install", and provide the installer with the path where ListManager is currently installed. The installer will automatically copy the data if necessary and upgrade the database.

**NOTE** Upgrading the database may take several hours, depending on the size of your data.

4. Allow the installer to start ListManager and the ListManager web server.
5. Close ListManager and the ListManager web server, and then upgrade one more time to v10.

## Upgrading ListManager: Unix

1. Shut down ListManager and the ListManager web server.
2. Untar and unzip the ListManager installer.
3. Cd to the directory created by the ListManager installer.
4. Run the following command to start the installer:

```
./install_lm.pl
```

5. Upgrade to 9.3D: When running the ListManager installer, select "Upgrade" instead of "New Install", and provide the installer with the path where ListManager is currently installed. The installer will automatically copy the data if necessary and upgrade the database.
6. Allow the installer to start ListManager and the ListManager web server.
7. Close ListManager and the ListManager web server, and then upgrade one more time to v10.

For details on how to upgrade ListManager on Unix, see [How to Upgrade ListManager by Hand](#).

## Notes

- ◆ ListManager 7.5 and above no longer support the Perl-based web interface that was shipped with previous versions of ListManager. This also includes LCP, which

may have been used to create custom scripts. If you have been using the old interface extensively or use custom scripting to run certain portions of ListManager prior to ListManager 7.5 (including list member signup forms), please contact support prior to upgrading.

- New tables created by ListManager in MSSQL will be owned by DBO. In versions before 8.1, the ListManager tables were owned by the user.

---

## Upgrading from ListManager 9.x

---

**If you are upgrading from ListManager 9.2 or 9.3:** You can upgrade directly to v10.

**If you are upgrading from ListManager 9.0 or 9.1:** You must upgrade twice:

1. Upgrade from 9.0 or 9.1 to 9.3D.
2. Upgrade from 9.3D to 10.

### Upgrading ListManager--Windows

[Important information about reducing upgrade time.](#)

1. Shut down ListManager and the ListManager web server.
2. Double click on the ListManager installer icon.
3. Do one of the following:
  - **If you are upgrading from ListManager 9.0 or 9.1:** Upgrade to v9.3D: When running the ListManager installer, select "Upgrade" instead of "New Install", and provide the installer with the path where ListManager is currently installed. The installer will automatically copy the data if necessary and upgrade the database.
  - **If you are upgrading from ListManager 9.2 or 9.3:** Upgrade to v10: When running the ListManager installer, select "Upgrade" instead of "New Install", and provide the installer with the path where ListManager is currently installed. The installer will automatically copy the data if necessary and upgrade the database.

**NOTE** Upgrading the database may take several hours, depending on the size of your data.
4. Allow the installer to start ListManager and the ListManager web server.
5. Do one of the following:
  - **If you are upgrading from ListManager 9.0 or 9.1:** Close ListManager and the ListManager web server, and then upgrade one more time to v10.
  - **If you are upgrading from ListManager 9.2 or 9.3:** No further steps are necessary.

### Upgrading ListManager: Unix

[Important information about reducing upgrade time.](#)

1. Shut down ListManager and the ListManager web server.
2. Untar and unzip the ListManager installer.
3. Cd to the directory created by the ListManager installer.
4. Run the following command to start the installer:

```
./install_lm.pl
```

5. Do one of the following:
  - **If you are upgrading from ListManager 9.0 or 9.1:** Upgrade to v9.3D: When running the ListManager installer, select "Upgrade" instead of "New Install", and provide the installer with the path where ListManager is currently installed. The installer will automatically copy the data if necessary and upgrade the database.
  - **If you are upgrading from ListManager 9.2 or 9.3:** Upgrade to v10: When running the ListManager installer, select "Upgrade" instead of "New Install", and provide the installer with the path where ListManager is currently installed. The installer will automatically copy the data if necessary and upgrade the database.
6. Allow the installer to start ListManager and the ListManager web server.
7. Do one of the following:
  - **If you are upgrading from ListManager 9.0 or 9.1:** Close ListManager and the ListManager web server, and then upgrade one more time to v10.
  - **If you are upgrading from ListManager 9.2 or 9.3:** No further steps are necessary.

For details on how to upgrade ListManager on Unix, see [How to Upgrade ListManager by Hand](#).

#### Notes

- ListManager 7.5 and above no longer support the Perl-based web interface that was shipped with previous versions of ListManager. This also includes LCP, which may have been used to create custom scripts. If you have been using the old interface extensively or use custom scripting to run certain portions of ListManager prior to ListManager 7.5 (including list member signup forms), please contact support prior to upgrading.
- New tables created by ListManager in MSSQL will be owned by DBO. In versions before 8.1, the ListManager tables were owned by the user.

## Upgrading By Hand--Linux

---

If you do not want to use the "install\_lm.pl" script to upgrade your existing ListManager installation, you can follow these steps to upgrade it by hand.

1. Make a backup of your ListManager directory before starting the upgrade. Make sure ListManager is not running. If you are using the included Apache web server, make sure it is not running.
2. Uncompress the ListManager tar file to a temporary location, such as /tmp/lm; copy the contents of the '/tmp/lm/bin' and '/tmp/lm/tclweb' directories to their counterparts in your existing ListManager installation (which will henceforth be referred to as ~lm).
3. Rename ~lm/bin/lmcfg\_template.txt to lmcfg.txt, and edit it, adding database connection information.

Check the database connection by running the following command:

```
~lm/bin/lm version
```

If ListManager connects successfully, a version string is displayed.

4. To upgrade your database to the current version, run the command:

```
./lm dbupgrade
```

5. To start ListManager, run the command:

```
~lm/bin/lm start
```

To run ListManager in the background:

```
~lm/bin/lm 1>/tmp/lm-stdout.txt 2>/tmp/lm-stderr.txt &
```

6. Send mail to listmanager@your-server to make sure that ListManager is answering email.
7. Rename the file ~lm/tclweb/bin/tclhttpd\_template.rc to tclhttpd.rc. Edit it, replacing '\$HOSTNAME' with the name of the machine; '\$PORT' with the port you want the web server to listen to (e.g., 80); and '\$EMAILADDR' with the email address of the administrator.

8. To run the ListManager Web Server in the foreground, run the command:

```
~lm/tclweb/bin/httpd-lm
```

To run the ListManager Web Server in the background, run the command:

```
~lm/tclweb/bin/httpd-lm 1>/tmp/httpd-lm-stdout.txt 2>/tmp/httpd-lm-stderr.txt &
```

9. With a web browser, go to the URL <http://your-server-url/>.

ListManager should now be upgraded on your system.

## After Upgrading ListManager

---

## Check archive settings in ListManager Pro

If you are using ListManager with the Pro feature set, please note: ListManager now has a list setting which controls how long mailings are saved. For upgraded servers, this setting defaults to five days, meaning delivery, clickthrough and other reporting data will be deleted after five days. To increase this setting and keep your data longer:

1. Upgrade ListManager.
2. Run ListManager.
3. Log in as a list administrator.
4. In the left Navigation bar, click **Utilities: List Settings: Automatic Maintenance: Purging Archives**.
5. Set **Keep mailing and clickthrough data for how many days** to the length of time you'd like to view delivery and clickthrough data (recommended: 30).
6. Click **Save**.
7. Repeat for all lists.

## Archives and Message Searching Availability

Message threading and searchable archives will not be available immediately after upgrading from versions 5.0 and earlier. ListManager 7.0 and later has new methods of threading and indexing archives so they are searchable.

After upgrading, ListManager will attempt to determine whether a message is a response to a previous message in that same list or whether it is starting a new 'thread' of discussion. This threading will be shown in the ListManager web interface.

ListManager also has a new improved method for full-text archive searching. The database design has been changed to make searching faster and more efficient, while also using less disk space. Additionally, the new web interface will allow new options for message searching include 'not equal' words, i.e., exclude messages that contain a set of words.

The database will be altered during the dbupgrade process to enable these features, and then as ListManager runs, the message-threading and full-text archives will be built. This means that any searches of the full-text archive may not find any data when ListManager is started for the first time. ListManager will be busily rebuilding the full-text archive in the background, and once it has completed it will remain up-to-date, since every message is archived when it is received.

# Database Upgrades

## Moving MSDE to MSSQL

---

As your ListManager MSDE database grows, or as your performance requirements increase, you may need to migrate the data in ListManager's MSDE database to Microsoft SQL server. These instructions show how to do so when installing MS SQL

on the same machine currently used by ListManager. If you are moving ListManager, please do so as a separate step.

Note: Although ListManager may use Microsoft SQL, Lyris does not support the Microsoft SQL database itself. These instructions are provided for the convenience of those using ListManager with Microsoft SQL, and are not a substitute for Microsoft's documentation.

1. Shut down ListManager.
2. Open a command prompt.
3. Detach the ListManager database by entering the following at the command prompt:

```
osql -S localhost -E
sp detach db ListManager
go
```

4. Use the service manager to stop MSDE.
5. Copy the following files to another location:

```
C:\Program Files\Microsoft SQL Server\MSSQL\Data>ListManager_Data.MDF
C:\Program Files\Microsoft SQL Server\MSSQL\Data>ListManager_Log.LDF
C:\Program Files>ListManager\lmcfg.txt
```

The first two files are a backup of your ListManager database. The third file (lmcfg.txt) contains information ListManager uses to connect to the database. *Be sure you have backup copies of these files in another location; if they are lost or corrupted, you will not be able to restore your ListManager database.*

6. Uninstall ListManager and MSDE (Microsoft SQL Server Desktop Engine) using the Windows Add or Remove Programs utility (Start > Control Panel > Add or Remove Programs).
7. Install Microsoft SQL server (or at a minimum, the Client Network Tools) on the ListManager server.

On the SQL server, create an initial database to be used for installation. This database will be used for installation purposes only.

8. Download ListManager for MS SQL
9. When prompted by the installer to specify the type of installation, select "New Install".

10. Proceed with the installation as prompted, specifying the database you created.

11. Shut down ListManager if you started it after the installation.

12. Attach the ListManager database backup files using SQL Server Enterprise Manager:

1. Right click on Databases.
2. Click All Tasks.
3. Click Attach Database
4. Specify the path where you copied ListManager\_Data.MDF (e.g., C:\Program Files\Microsoft SQL Server\MSSQL\Data>ListManager\_Data.MDF)
5. By default, the database will be attached as ListManager. Change the database name in Attach as: if desired.
6. Specify the database owner. You may need to create an owner through the "Security" option in Enterprise Manager.
7. Click OK to attach the database.

13. Copy the Imcfg.txt file created before deleting the original ListManager installation to C:/Program Files/ListManager, overwriting the copy of Imcfg.txt created by ListManager during installation.

Open the Imcfg.txt file using a plain-text editor such as Notepad and edit it to use the database name, owner and password you specified when you attached the ListManager database using SQL Server Enterprise Manager. Save.

14. Open a command prompt, and change to the ListManager directory.

15. If upgrading ListManager, run the following command to upgrade the database:

```
lm dbupgrade
```

**NOTE** Upgrading the database may take several hours, depending on the size of your data.

16. Start ListManager and the ListManager web server.

You're done!

# Testing ListManager Upgrades

## Testing ListManager Upgrades

---

Be sure to also read [Important Upgrade Information](#) and [Preparing to Upgrade](#).

WARNING: If you are currently running ListManager, DO NOT upgrade your existing (production) ListManager server until you are certain you want to upgrade. You WILL NOT be able to downgrade it to an earlier version.

There are two ways to test ListManager:

1. Test a [clean installation on a test server](#). (Required for MSDE databases; strongly recommended for other databases.)
2. Test your [production data on a test server](#). (Not permitted for MSDE databases.)

We strongly recommend the first option: that you test a clean installation of ListManager on a test server. If you test using your production data, be aware that if you run the test server and the production server simultaneously, you run the risk of having duplicate messages sent unless you follow [these instructions carefully](#).

## Testing on a Test Server

---

The best way to test ListManager is to install it with a clean database on a test server.

1. Obtain an evaluation serial code from your Lyrus account representative.
2. Create a blank database for ListManager to use. If using the bundled Windows MSDE database, skip this step.
3. Install ListManager on your test server. Be sure to specify the blank database during installation, not your production database.
4. General installation instructions are [available here](#).
5. Information about installing behind a firewall is [available here](#).

## Testing Production Data on a Test Server

---

**PLEASE READ ALL THESE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.**

Failing to follow these instructions can cause you to inadvertently upgrade your production database, or to send out duplicate mailings. If you are uncertain about following these instructions, contact your account representative, who can arrange a demonstration of the new features in ListManager.

You should NOT send or receive test mailings using this method, since doing so will interfere with your production server.



1. Obtain an evaluation serial code from your Lyris account representative.
2. Make a copy of your production ListManager database to be used for evaluation purposes.
3. Create a blank database to be used during installation.
- 4 You need to know the name of this ListManager machine as it is configured in your database.

## Upgrading

The upgrade process to ListManager 9.x varies depending on which version you are currently using:

### To upgrade from v6.x or lower

1. Upgrade to v7.0
2. Upgrade from v7.0 to v.8.9c.
3. Upgrade from v8.9c to v9.x.

### To upgrade from v.7x

1. Upgrade to v8.9c.
2. Upgrade from v8.9c to v9.x.

### To upgrade from v8.x

- Upgrade to v9.x.

## Preparing for Testing

### 1. For Testing Upgrade from 5.0-7.8 to 9.x

- Open a command prompt on the old machine, and change to the ListManager directory.\
- Run `lm configlist` for a list of the machine names in ListManager's database. Note the name.

### 2. For Testing Upgrade from 7.8 to 8.9

- Open the file `lmcfg.txt` (located in `C:\Program Files\ListManager` or `~/ListManager/bin`) using a plain-text editor (such as Notepad or vi).
- Note the value of `$node_name`.

3. Install ListManager on a test server, using the blank database.

4. Select "New Install".

5. When the installer requests the database information, be sure to specify the blank database during installation, not your production database or your test database.

6. Shut down ListManager if you started it after the installation.

7. Open the file *lmcfg.txt* with a plain text editor, and edit it so ListManager now uses your test database instead of the blank database.

8. Change the value of *\$node\_name* to be the name of your old ListManager installation.

9. At the command prompt, run the following command to upgrade the database to be used by ListManager:

```
lm dbupgrade
```

This process may take several hours, depending on how large your database is.

10. At the command prompt, run the following command to enter your evaluation serial code:

```
lm serial xxxxxx
```

Where xxxxxx is your evaluation serial code.

11. IMPORTANT: Start ListManager so it does not send or receive mail. To do so, start it at the command prompt like so:

```
lm start noincoming nomail
```

12. Start the ListManager Web Server.

13. Go to [Utilities: Administration: Sites](#), and edit any sites you have, so that the Internet Host Name field for each site is the name of your new ListManager machine. Also assign the IP addresses ListManager should use for SMTP and NNTP on each site.

14. Go to [Utilities: Administration: Server: Server Settings: Machine Settings: IP Addresses](#), and specify what IP addresses ListManager should bind to for DNS lookups.

## Moving ListManager

### Moving ListManager: Windows

---

For best results, upgrade and move ListManager in two stages:

1. Upgrade to the current version on the old machine.
2. Follow the instructions below to move that ListManager installation to the new machine.

**IMPORTANT** Back up your database before moving.

1. Shut down ListManager on the old machine.
2. You need to know the name of this ListManager machine as it is configured in your database.
  - a. Open the file `lmcfg.txt` (located in `C:\Program Files\ListManager`) using a plain-text editor such as Notepad.
  - b. Note the value of `$node_name`.
3. On the new machine, download the installer. Start the installer by double clicking on the installer icon.
4. When prompted by the installer to specify the type of installation, select "New Install".
5. When the installer requests the database information, you may provide the information for your earlier ListManager installation—but DO NOT have the installer create the tables for you—this will delete your database!

Alternatively, you may create a database or user just for the installation, and change which database ListManager uses by editing `lmcfg.txt` with a plain text editor. See [Connecting to Your Database with `lmcfg.txt`](#) for more information about editing this file.

6. Shut down ListManager if you started it after the installation.
7. Open the file `lmcfg.txt`.
8. Edit the value of `$node_name` to be what it was for your old installation.
9. Open a command prompt, and change to the ListManager directory.
10. Run the following commands to retrieve the activation code for the new machine:

```
lm clearactivation  
lm getactivation
```

11. Start ListManager and the ListManager web server.
12. Depending on your settings for your previous installation, the ListManager web server may not be able to communicate with ListManager on localhost (127.0.0.1), preventing it from running. If running ListManager from the command prompt, you will see a message like this one:

```
Error: unable to listen to: TCP/IP address: 192.168.0.5, port number: 2021
```

- a. Open the file `~listmanager/tclweb/bin/tclhttpd.rc` with a plain-text editor such as notepad.
- b. Note the IP address being used in *Config ipaddr*.
- c. Open a command prompt, and run the following command, specifying the IP address from `tclhttpd.rc` for the IP address:

```
lm tclportbindip ip_address
```

- d. Start ListManager and the ListManager web server.

13. Log into the ListManager web interface as a server administrator.

14. Go to [Utilities: Administration: Sites](#), and edit any sites for this node (or all sites if you are not on a clustered environment). Change the "Internet Host Name" and the "URL to web interface" (unless your webserver resides on a different machine) fields for each site to point to the name of your new ListManager machine. Then on the SMTP tab, change the "Incoming SMTP IP address" and "Outgoing SMTP IP address" to either "(all)" or the IP address of your current machine. Make the same change on the NNTP tab to the "NNTP IP address" field. Finally, if you have ClickTracks integration, hit the "Change" button next to the "Connection String" field on the ClickTracks tab to update the URL there.

15. Go to [Utilities: Administration: Server: Server Settings: Machine Settings: IP Addresses](#), and specify what IP addresses ListManager should bind to for DNS lookups.

## Moving ListManager: Windows (with MSDE)

---

For best results, upgrade and move ListManager in two stages:

1. Upgrade to the current version on the old machine.
2. Follow the instructions below to move that ListManager installation to the new machine.

**IMPORTANT** Back up your database before moving.

1. Shut down ListManager on the old machine.
2. You need to know the name of this ListManager machine as it is configured in your database.
  - a. Open the file `lmcfg.txt` (located in `C:\Program Files\ListManager` using a plain-text editor such as Notepad.
  - b. Note the value of `$node_name`.

3. Use the service manager to stop MSDE.

4. Copy the following files to another location:

C:\Program Files\Microsoft SQL Server\MSSQL\Data>ListManager\_Data.MDF  
C:\Program Files\Microsoft SQL Server\MSSQL\Data>ListManager\_Log.LDF

5. On the new machine, download the installer. Start the installer by double clicking on the installer icon.

6. When prompted by the installer to specify the type of installation, select "New Install".

7. Proceed with the installation as prompted.

8. Shut down ListManager if you started it after the installation.

9. Replace the following files with their equivalents from the old machine:

C:\Program Files\Microsoft SQL Server\MSSQL\Data>ListManager\_Data.MDF  
C:\Program Files\Microsoft SQL Server\MSSQL\Data>ListManager\_Log.LDF

10. Open a command prompt, and change to the ListManager directory.

11. Open the file lmcfg.txt (located in C:\Program Files>ListManager) using a plain-text editor such as Notepad.

12. Edit the value of `$node_name` to be what it was for your old installation.

13. Open a command prompt, and change to the ListManager directory.

14. Run the following commands to retrieve the activation code for the new machine:

```
lm clearactivation  
lm getactivation
```

15. Start ListManager and the ListManager web server.

16. Depending on your settings for your previous installation, the ListManager web server may not be able to communicate with ListManager on localhost (127.0.0.1), preventing it from running. If running ListManager from the command prompt, you will see a message like this one:

```
Error: unable to listen to: TCP/IP address: 192.168.0.5, port
number: 2021
```

- a. Open the file `~listmanager/tclweb/bin/tclhttpd.rc` with a plain-text editor such as notepad.
- b. Note the IP address being used in *Config ipaddr*.
- c. Open a command prompt, and run the following command, specifying the IP address from `tclhttpd.rc` for the IP address:

```
lm tclportbindip ip_address
```

- d. Start ListManager and the ListManager web server.

17. Log into the ListManager web interface as a server administrator.

18. Go to [Utilities: Administration: Sites](#), and edit any sites for this node (or all sites if you are not on a clustered environment). Change the "Internet Host Name" and the "URL to web interface" (unless your webserver resides on a different machine) fields for each site to point to the name of your new ListManager machine. Then on the SMTP tab, change the "Incoming SMTP IP address" and "Outgoing SMTP IP address" to either "(all)" or the IP address of your current machine. Make the same change on the NNTP tab to the "NNTP IP address" field. Finally, if you have ClickTracks integration, hit the "Change" button next to the "Connection String" field on the ClickTracks tab to update the URL there.

19. Go to [Utilities: Administration: Server: Server Settings: Machine Settings: IP Addresses](#), and specify what IP addresses ListManager should bind to for DNS lookups.

## Moving ListManager: Linux

---

For best results, upgrade and move ListManager in two stages:

1. Upgrade to the current version on the old machine.
2. Follow the instructions below to move that ListManager installation to the new machine.

**IMPORTANT** Back up your database before moving.

1. Shut down ListManager on the old machine.
2. You need to know the name of this ListManager machine as it is configured in your database.
  - a. Open the file `~/ListManager/bin/lmcfg.txt` using a plain-text editor such as vi.
  - b. Note the value of `$node_name`.

3. Start the installer ListManager on the new machine. On Unix cd to the lm/bin directory, and run from the command prompt:

```
./install_lm.pl
```

4. Select "New Install".
5. When the installer requests the database information, you may provide the information for your earlier ListManager installation—but DO NOT have the installer create the tables for you—this will delete your database!

Alternatively, you may create a database or user just for the installation, and change which database ListManager uses by editing `lmcfg.txt` with a plain text editor. See [Connecting to Your Database with `lmcfg.txt`](#) for more information about editing this file.

6. Proceed with the installation as prompted.
7. Shut down ListManager if you started it after the installation.
8. Open a command prompt, and change to the ListManager directory.
9. Run the following commands to retrieve the activation code for the new machine:

```
lm clearactivation  
lm getactivation
```

10. Start ListManager and the ListManager web server.
11. Depending on your settings for your previous installation, the ListManager web server may not be able to communicate with ListManager on localhost (127.0.0.1), preventing it from running. If running ListManager from the command prompt, you will see a message like this one:

```
Error: unable to listen to: TCP/IP address: 192.168.0.5, port  
number: 2021
```

If this is the case for your installation, follow these steps:

- a. Open the file `~listmanager/tclweb/bin/tclhttpd.rc` with a plain-text editor such as `vi`.
- b. Note the IP address being used in `Config ipaddr`.
- c. Open a command prompt, and run the following command, specifying the IP address from `tclhttpd.rc` for the IP address:

```
lm tclportbindip ip_address
```

- d. Start ListManager and the ListManager web server.

12. Log into the ListManager web interface as a server administrator.
  
13. Go to [Utilities: Administration: Sites](#), and edit any sites for this node (or all sites if you are not on a clustered environment). Change the "Internet Host Name" and the "URL to web interface" (unless your webserver resides on a different machine) fields for each site to point to the name of your new ListManager machine. Then on the SMTP tab, change the "Incoming SMTP IP address" and "Outgoing SMTP IP address" to either "(all)" or the IP address of your current machine. Make the same change on the NNTP tab to the "NNTP IP address" field. Finally, if you have ClickTracks integration, hit the "Change" button next to the "Connection String" field on the ClickTracks tab to update the URL there.
  
14. Go to [Utilities: Administration: Server: Server Settings: Machine Settings: IP Addresses](#), and specify what IP addresses ListManager should bind to for DNS lookups.



# Members

## Members -- Overview

---

### What Are Members?

Members are the email addresses of people who may receive your mailings.

When a person asks to join your list, ListManager records the email address and additional information about the person, such as name and password, in its database. If you'd like to store additional demographic information about members, the server administrator may add additional fields to the `members_` table.

An email address may remain a member of a list, even if its member status is inactive-- for example, if the member unsubscribed, or is on hold due to delivery issues.

Duplicate email addresses may not be added to a list, though the same email address may be a member on many different lists.

The total number of members you may have is determined by your license. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to increase the number of members you may have.

### Add Members

Members usually join a list by filling out a [web form](#), or by sending an email message to the list's [join address](#).

But administrators can also add [single](#) new members, [many](#) new members, import members from a [text file](#), or import members from a [CSV file](#). The last option allows administrators to update data for members.

### View Members

The View Members table displays the email addresses of your members. You may click on an address to edit the member, or view a member's history to see what mailings that member has received and what actions the member has taken.

The View Members table is also where you may search for individual or groups of members, and then edit or delete them.

### Ban Members

ListManager can automatically deny subscription requests and postings from addresses you specify when you [ban](#) them. Bans prevent addresses from being imported by administrators as well, so you are certain that people who have complained about receiving your mail are never inadvertently readded.

### Delete Members

Use Delete Members if you have a list of email addresses you need to remove. You can also delete individual members from the View Members screen.

For information about your list's membership, see [Reports: Members](#).

## Synchronization Settings

ListManager can synchronize its data with other data sources using ODBC. These settings determine how ListManager will create, edit and delete members, and according to what schedule.

## Synchronize Now

Synchronizes members with your external data source. Generally, this synchronization will occur according to the schedule you establish in your Synchronization Settings. But you may synchronize immediately here.

# Add Members

## Members: Add Members

---

ListManager gives list administrators four ways to add members through the interface:

1. Create a [single new member](#)
2. Create [many new members](#)
3. Import members from a [text file](#)
4. Import members from a [CSV file](#)

### Add Member

Adds a single email address to ListManager. Since List Administrators are normal mailing list members, but with additional properties rights, Add Member can also be used for creating List Administrators.

### Add Many Members

Adds many email addresses to ListManager. No names may be specified when using Add Many Members, and all settings specified will be applied to all new addresses added. Duplicates will be skipped.

### Import Members from a Text File

Imports many email address and optional names. Duplicates will be skipped.

### Import Members from a CSV File

Imports many email addresses with other demographic information. Duplicates may be skipped, or updated with the information included for the address.

In some cases, ListManager blocks certain email addresses that correspond to ListManager email commands. Please refer to this [list of email commands](#) that cannot be used as member email addresses within ListManager.

The total number of members you may have is determined by your license. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to increase the number of members you may have.

## Members: Add Members: Add Member

---

The Add and Edit Member screens are identical.

The only required setting for a member is the email address on the Members: Add Members: Add Member: Basics tab.

If you'd like this member to also be a list admin, fill out the required information under [List Admin](#), and also the Password under [Settings](#).

Note that the total number of members you may have on your server is determined by your license. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to increase the number of members you may have.

## Member Settings

### Members: Add Members: Add Member: Basics

---

#### Email Address

Required. The Internet email address of the member. For example: *john@example.com*

If adding many members, use a separate line for each email address. For example:

*john@example.com*  
*bob@example.com*

#### Name

The member's full name. For example: *John Smith*

Note: You cannot specify a name when adding many members at a time. Use [Members: Import Members](#) to import members with names or other information particular to each member.

## Members: Add Members: Add Member: List Admin

---

#### Is List Admin?

Determines whether this member is a list administrator. If set to Yes, this member will be able to access the List Administrator functions of the web interface.

### **Receive List Admin Mail**

Determines whether this member receives email for this list's administrators. Mail sent to owner-listname (example: owner-jazztalk@example.com) is distributed to each of the members who have their Admin Mail set to Yes. Also, if the mailing list is set to be [private](#), the Receive List Admin Mail setting determines whether this member receives email notifications of requests to join the private mailing list.

### **Receive Moderation Notifications?**

Determines whether this member receives email notifications of moderated messages to the mailing list, which need to be approved or rejected. If the list does not require moderation, this setting has no effect.

### **Bypass List Moderation?**

If this mailing list is set to moderate messages in some way, the bypass setting gives this member the right to contribute messages to the mailing list without being moderated.

If a list is set to always require moderation, every message sent to the list needs to be approved by the administrator, even those posted by administrators. This setting allows members to post directly to the list regardless of the list moderation settings.

Note that bypassing list moderation is insecure, as an administrator could inadvertently send a virus to the list.

### **Page Permission Group**

Select the URL page permission group for this list administrator from the drop-down menu. This enables administrators to either allow or deny access to specific URLs within ListManager. To allow this administrator access to all URLs, select "Allow all". In order for permission groups to appear here, they must first be created in [Utilities: Administration: Administrators: Permission Groups](#). ListManager includes some default permission groups which will be listed here as well.

The default setting is "Allow all".

### **Enable WYSIWYG Editor**

By default the [HTML editor](#) is available to administrators in Content and Mailings. Some administrators may prefer to have the HTML editor always disabled, especially if they are always using their own HTML, which may be munged by ListManager's included HTML editor.

Note that if an administrator is both a list and site or server administrator, the site or server admin setting for Enable WYSIWYG Editor will override the list administrator setting.

---

## **Members: Add Members: Add Member: Settings**

### **Membership Status**

Defines whether this person is an active, normal member, meaning that they can participate in the mailing list and receive mail, or if their status is otherwise. The different statuses are:

**Normal**

An active member who may receive mail from the list.

**Confirm**

The person has requested to join this mailing list, but has not confirmed the subscription request by replying or clicking on a confirmation message.

Once the member has confirmed membership, the person's status will change to normal. Note that if the confirmation message is undeliverable, the member will be deleted.

**Confirm-Failed**

The person has requested to join this mailing list, but the confirmation message sent failed with a permanent, 500-level error. These errors are generally returned when the email address does not exist, but may also occur when the receiving mail server believes the confirmation message is spam and thus rejects it with a permanent error. To see which is the case, view the sending record for the confirmation message in Member: Edit Member: Information: View Mailings Attempted.

**Private**

The person has requested to join this mailing list, but because this is a [private](#) mailing list, the request to join is pending list administrator approval.

When a mailing list is set to private, mailing list administrators who have Admin Mail set to Yes receive a short email notification message for each request to join the private mailing list.

**Expired**

The member had their membership set to expire on a certain date, and that date has passed, so this person's membership has expired and is no longer active.

**Held**

An undeliverable member. ListManager failed to deliver mail to this address the number of times specified in [Utilities: List Settings: Automatic Maintenance: Error Mail: Bounce Limit](#).

A user may become "unheld" by replying to a [held notification](#).

**Unsubscribed**

The member has opted out of the list. The member will not receive email, but is retained in the database for statistical reasons or in case the member decides to resubscribe.

**Complaint**

This member marked an email from this list as spam. The member is HELD-- i.e., no mail will go out to them.

**Referred**

The member was invited to join using a referral, but has not yet formally joined the list.

#### **Needs-Confirm**

The member will receive a message asking them to confirm membership, and then their status will be set to Confirm. Administrators may use this status when creating members to allow them to confirm their memberships.

#### **Needs-Hello**

The member will receive a message welcoming them to the list, and then their status will be Normal. Administrators may use this status when creating members to notify them they have been added.

#### **Needs-Goodbye**

The member will receive a message informing them they have left the list, and their status will be Unsubscribed. Administrators may use this status when unsubscribing members to notify them they have been removed.

### **Membership Kind**

This choice defines how the member wants to receive messages from the mailing list. The choices are:

#### **Mail**

As soon as someone contributes a message to the mailing list, the user will receive a copy of that message.

#### **Digest**

Each night, the user will receive a single email message containing all the messages contributed to the mailing list that day in plain-text; all HTML and attachments will be stripped. At the top of the message will be a numbered list of the subjects in that digest, followed by the complete messages themselves. Digest recipients will not receive messages sent to segments. Note that the server administrator may specify a different schedule to release digests in [Utilities: Administration: Server: Server Settings: Scheduled Tasks](#).

#### **MIME Digest**

The same as a digest, but in MIME format so that the individual messages' formatting is preserved. Digest recipients will not receive messages sent to segments.

#### **Index**

Each night, the user will receive a single email message containing all the subject lines of all the messages contributed to the mailing list that day. If any of the messages interest the user, the bottom of the index gives the email command that will retrieve the bodies of the messages.

#### **Nomail**

No email is sent to the user. The user is free to go the web interface whenever they want, and read the full text of the messages there. This setting is useful for when members go on vacation and want to stop receiving mail.

### **Enter/Verify New Password**

The password for this member, masked and encrypted. To change the password, it must be entered twice to verify it has been entered correctly.

List administrators must specify a password. A password is optional for members.

If this member joined by sending email to the list's join address, the password is blank unless the list requires a member have a password. In that case, a random password will be assigned to the member if the member does not select one.

If the email address has multiple accounts on the server, you will be prompted to select which accounts to apply the new password to.

### **Membership Expiration Date**

If set, this member's Status will change to Expired after the date specified. For example, to expire this member on January 1, 2003, you would enter "01/01/03".

### **# of Approvals Required**

If the mailing list is set to use [Number Moderating](#), this setting determines how many more messages this member needs to have approved before this member can contribute messages without needing approval. Once a list is set to Number moderated, each member must have a specific number of messages moderated and approved before "no approval needed" gets saved to their member profile. Note that this setting has no effect if this is not a number moderated list.

It can also be used with an unmoderated list, if problems with a particular member require that person's messages to be moderated. If a list is NOT number moderated, the default here will be "no approval needed," but the list will require all messages to be reviewed by an administrator, unless the member has the *bypass list settings* button set to Yes on the [ListAdmin](#) tab.

This setting overrides the list's settings.

For more information on different types of approval for lists, see [Utilities: List Settings: Email Submitted Content: Approval](#).

## **Members: Add Members: Add Member: Advanced Settings**

---

### **Hold User?**

This setting determines whether this member will be held if they bounce too much mail. The default is "Yes, Put This Member on Hold if They Bounce Too Much Mail." Change to "No, Never Put This Member on Hold, Even if They Bounce Too Much Mail" to prevent the member from ever going on hold. Note: Automatic holding of members can also be disabled at the [list](#) and [server](#) levels.

### **User ID**

The "user id" information is not used by ListManager for any purpose: it is merely a placeholder for any information you care to place in there. For example, you might use it to store the Member ID from some other database.

## **Comment**

The "comment" information is not used by ListManager for any purpose: it is merely a placeholder for any information you care to place in there. For example, you might use it to store the city a member lives in.

## **Additional**

Like "comment," the "additional" information is not used by ListManager for any purpose, so it may be used to contain any information you'd like.

## **Mail Format**

Whether or not a member has expressed an interest in receiving HTML mail. There are three options:

### **Multipart**

The default setting. The user prefers to receive mail in multipart-alternative.

### **Text**

The user prefers to receive text only email.

### **HTML**

The user prefers to receive HTML only email.

You may want to have your members specify which mail format they prefer when they subscribe to your list. You may then send out specially formatted messages to [segments](#) based on this information.

## **HTML Capability Detected**

Whether or not the capability to read HTML has been detected for this member. To detect HTML capability, a mailing must be sent with HTML detection enabled. See [Mailings: New Mailing: Tracking](#) for more information.

## **Receive Acknowledgement When Contributing?**

When a member contributes a message to the mailing list, they have the option of being notified that the message was in fact delivered and sent out. If a member is sending out an important announcement, they might want to be notified that it really went out. By default, this setting is "No," meaning that the member will not receive an acknowledgement when posting.

## **Receive Copy of Own Postings?**

This setting determines if this member will get a copy of their own postings to the mailing list. If set to "Yes" (the default), the member will receive copies of messages they contribute to a mailing list when they are distributed to list. If "No," the member will not receive copies of his own postings.



## Members: Add Members: Add Member: Information

---

### List Name

The name of the list this member is on.

### Member ID

The unique ListManager identification number for this member.

### View History

The *view history* button takes you to the [Member History](#) page, where you can view a detailed history for that member including opens, clicked URLs, clickthroughs, etc.

### Mailings Attempted

Displays the number of mailings which were attempted for this member. For details about the attempted mailings, click "view mailings attempted". This takes you to the Members: View Members: Member History: Member Mailings Attempted page, where the mailing and sending details can be accessed.

### Date Joined

The date the member joined or was added to the list.

### Date Confirmed

The date the member confirmed joining the list. The date confirmed will come after the date joined.

### Date Held

The date the member was put on hold, if applicable.

### Date Unsubscribed

The date the member unsubscribed from the list, if applicable.

## Members: Add Members: Add Member: Demographics

---

This page shows additional information about this member that is not in one of ListManager's standard member fields.

The ListManager server administrator or database administrator may [add member columns](#) to the ListManager [members](#) database table. If a member joins or is [imported](#) with additional information, it will be displayed on this page, where you may view, edit or delete it. Contact your server or database administrator if you would like to have more fields made available to you.

## Members: Add Members: Add Many Members

---

Create Many New Members is similar to [Add Member](#), except you may copy and paste a list of email addresses in at once. There may be only one email address per line.

Example:

```
bob@example.com  
jane@aol.com  
keiko@hotmail.com
```

### Notes

- If you add an email address that is already present, an error message appears stating "There were problems on your form."
- You cannot add addresses with names when you create them on this page. To do so, you'll need to [Import Members from Text File](#) or from [CSV File](#).

## Members: Add Members: Import Members from Text File

---

This page allows you to import email addresses from a text file. Email addresses which are already members will be skipped. To update members with additional demographic information, use [Import Members from CSV File](#).

The file must be a plain-text file. Each email address and name must be on a separate line, and must be in one of the following formats:

```
bob@example.com  
bob@example.com Bob Shelby  
bob@example.com (Bob Shelby)  
Bob Shelby <bob@example.com>
```

Note that once the import has started, you may not close the window until the import is completed.

### Action

You may import members in one of four ways:

#### **Import quietly as regular members**

Import the members into the list, but do not send a hello or confirmation message. These members will receive normal list mailings.

#### **Import as regular members and send list hello doc**

Import the members into the list, and send them the hello message as specified for your list in [Utilities: Document Associations](#). If no document is specified here, new members will receive a generic message from ListManager. These members will receive normal list mailings.

#### **Import as unconfirmed members, and send confirmation request**

Import the members into the list as unconfirmed, and send them the confirmation message as specified for your list in [Utilities: Document Associations](#). If no document is specified here, new members will receive a generic message from ListManager. These members will not receive normal list mailings until they confirm their memberships.

#### **Terminate import**

Sets the number of consecutive invalid email addresses to end the import process. For instance, you may want to terminate the import after 10 invalid email addresses, and check your formatting to see why so many addresses are failing. You can also set it to "Do not terminate import due to malformed addresses" if you'd like to ignore any bad addresses and process the import as-is.

#### **Select file**

Enter the path of the file that contains the members you'd like to import. Or, select Browse to find the file.

#### **Import**

Click *import* to begin the member import. ListManager will display the number of addresses successfully imported, and display the addresses skipped due to being duplicates or invalid addresses.

## **Members: Add Members: Import Members from CSV File**

---

This page allows you to import email addresses from a CSV file.

Email addresses which are already members can either be skipped or updated with new data (i.e. demographic information), so importing members can be used as a way of updating current members with additional information.

A CSV file has the information you would like imported in a CSV (comma separated values) format. The first row of the file tells ListManager which field the data in each column should be imported into. For example:

```
EmailAddr ,FullName ,Company,Phone  
bob@example.com,Bob Shelby,Shelby Corp.,555-555-5555
```

In this example, EmailAddr\_ and FullName\_ correspond to the default database fields in the members\_ table for email addresses and full names.

Additional fields called "Company" and "Phone" have been added to this members\_ table, so this information can also be imported into each member's record. (These fields are not provided by default; you will need to add them to your members\_ table if you would like to store this information).

The "EmailAddr\_" column name is required. You may add other data if you like. Some default members\_ table fields which you may want to include in your import are:

**Additional\_**

Placeholder for any information you want to store associated with this member.

**Comment\_**

Holds whatever comments you wish to put in. Useful as a user-defined 'additional info' field.

**EmailAddr\_**

The email address of this person (required).

**FullName\_**

Full name of this person.

**MailFormat\_**

What mail format does the user prefer, (T)ext, (M)ultipart, or (H)TML. The default is M, for Multipart.

**MemberType\_**

Specifies the membership status. If specified, you should also select "Use type setting in CSV file". Possible member statuses are:

normal (default)  
unsub  
held  
private  
expired  
held  
needs-goodbye  
needs-hello  
needs-confirm

Note that unless the [server is configured to permit it](#), non-normal members (e.g., unsub) will not be able to be made normal, so you cannot resubscribe members inadvertently.

See [Members: Add Members: Add Member: Settings: Member Status](#) for more information about these different member statuses.

By default, the MemberType\_ may be changed only if the current MemberType\_ is normal. To change other member types, [Utilities: Administration: Server: Server Settings: Security: User Limits: Let CSV Member Imports Update Non-Normal Member Status](#) must be set to yes.

**SubType\_**

The type of mail the subscriber wants to receive. This setting correlates to [Membership Kind](#). Possible kinds are:

mail (default)  
digest

mime-digest  
index  
nomail

**UserID\_**

Holds the user-definable 'user id' information, such as a key back to another table.

**Action**

You may import members in one of four ways:

**Import quietly as regular members**

Import the members into the list, but do not send a hello or confirmation message. These members will receive normal list mailings.

**Import as regular members and send list hello doc**

Import the members into the list, and send them the hello message as specified for your list in [Utilities: Document Associations](#). If no document is specified here, new members will receive a generic message from ListManager. These members will receive normal list mailings.

**Import as unconfirmed members, and send confirmation request**

Import the members into the list as unconfirmed, and send them the confirmation message as specified for your list in [Utilities: Document Associations](#). If no document is specified here, new members will receive a generic message from ListManager. These members will not receive normal list mailings until they confirm their memberships.

**Use type setting in CSV file**

Import the members using the setting specified in the MemberType\_ column.

**Update existing members? (CSV Only)**

Determines how ListManager will handle duplicate email addresses in CSV files. If set to "No" (default), ListManager will skip duplicate addresses. If set to "Yes," ListManager will update duplicate addresses with the additional data provided for the address.

ListManager will recognize the member as a duplicate if the email address is the same, or the file includes their member ID number (and that is a match).

Note: If set to any type but "normal" the MemberType\_ field may *not* be overwritten unless [Utilities: Administration: Server: Server Settings: Security: User Limits: CSV Member Imports Can Change Non-Normal Status](#) is set to "Yes".

**Terminate import**

Sets the number of consecutive invalid email addresses to end the import process. For instance, you may want to terminate the import after 10 invalid email addresses, and check your formatting to see why so many addresses are failing. You can also set it to "Do not terminate import due to malformed addresses" if you'd like to ignore any bad addresses and process the import as-is.

**Select file**

Enter the path of the file that contains the members you'd like to import. Or, select Browse to find the file.

## View Member Columns

This page shows you the fields available to you in the ListManager members\_ table. You may use these column names when importing your member data in csv (comma separated value) format.

The only required column is EmailAddr\_, to specify the email address of the list member.

Your database administrator may have added additional columns to your members\_ table so it can store additional information. These fields are marked on this page with an asterisk (\*).

The fields List\_, UserNameLC\_, and Domain\_ will be created automatically by ListManager, and should not be included in a CSV import.

### Add additional columns to members table

Visible only to server admins. You will be taken to [Utilities: Administration: Server: Database: Add/remove member columns: Wizard](#), where you may add additional members\_ columns.

### Import

Click **Import** to begin the member import. ListManager will display the number of addresses successfully imported or updated, and display the addresses skipped due to being duplicates or invalid addresses.

## View Members

### Members: View Members

---

The View Members page shows a table of your list's members.

#### Members Table

To view or edit a particular member, click the email address. You will be taken to the [Members: View Members: Edit Member](#) page.

You may change the order members are displayed by clicking on the up or down triangles on the column headings. The headings are:

#### Email

The email address of the member.

#### Name

The full name of the member, if available.

#### Joined

The date the member joined.

### Status

Whether the member is a normal, active member, or inactive-unsubscribed, held, confirm, private, etc. See [Members: Add Members: Member Settings: Settings: Membership Status](#) for more information about different member statuses.

### Member Options

You have the following options for each member:

#### Copy

Copies the current member. ListManager will display the old name and email address, and will allow you to specify a new name, new email address, and the destination list(s) the member should be copied to. The member created will have all of the settings of the old member, including the password. Copying a member is useful if you'd like to make another list administrator—just copy an existing one.

**Delete** Permanently removes the member from the ListManager database.

#### History

Displays information about when the member joined, what messages have been attempted to be sent to this member, and recorded member actions: opens, clickthroughs, purchases, etc. See [Members: Member History](#) for more information.

### Display Options

To view a particular category of members, click the drop-down box above the table and then choose one of the following **Show:** options.

#### all members

#### confirm (awaiting user confirmation)

The person has requested to join this mailing list, but has not confirmed the subscription request by replying or clicking on a confirmation message.

#### confirmation failed (error sending confirmation)

The person has requested to join this mailing list, but the confirmation message sent failed with a permanent, 500-level error. These errors are generally returned when the email address does not exist, but may also occur when the receiving mail server believes the confirmation message is spam and thus rejects it with a permanent error. To see which is the case, view the sending record for the confirmation message in Member: Edit Member: Information: View Mailings Attempted.

#### expired (subscription expired)

The member had their membership set to expire on a certain date, and that date has passed, so this person's membership has expired and is no longer active.

#### held (bad email addresses)

An undeliverable member. ListManager failed to deliver mail to this address the number of times specified in [Utilities: List Settings: Automatic Maintenance: Error Mail: Bounce Limit](#). A user may become "unheld" by replying to a [held notification](#).

#### list administrators

#### normal (active) members

Active members who may receive mail from the list.

**not list administrators**

**private (awaiting admin approval)**

Members who have requested to join this mailing list, but because this is a [private](#) mailing list, the request to join is pending list administrator approval.

**referred (referred by a friend, awaiting confirmation)**

**Unsubscribed members**

Members who have opted out of the list.

**complainers**

Members that have marked an email from this list as spam.

**Delete All in this View**

Delete all members shown in this table view. Note that members may be deleted who are not visible on this page but are part of the table you are viewing.

**Find Members**

[Search for members](#) by email address, domain, segment, status, kind, or member ID.

**Create New Member**

Creates a single new member. See Members: Add Members for other member options.

To search this table, click . To export this table as a CSV file, click .

## Find Members

### Members: View Members: Find Members

---

The Find Members screen allows you to search for members in many different ways: by email address, domain, segment, status, kind, or member ID. You may then view the member records of those you find, copy or delete them, or download the table to a file.

### Members: View Members: Find Members: Email Address

---

**Email Address**



Enter the email address or partial email address of the member you'd like to find. ListManager will show you the results of your search in the [Members: View Members](#) page.

### **Look For**

Select whether you'd like to find an Exact Match to the email address you specified, or any address that Contains the partial address you provided in Email Address. For example, if you wanted to find all members who have .ml in their email address, you would specify .ml in Email Address, and specify Contains.

### **Search In**

Specify whether you'd like to limit your search to This List, or All Your Lists. If you select All Your Lists, you will see the results for all lists for which you have administrative access.

## **Members: View Members: Find Members: Name**

---

### **Name**

Enter the name or partial name of the member you'd like to find. ListManager will show you the results of your search in the [Members: View Members](#) page.

Tip: This search is case-insensitive, so JOHN DOE will retrieve the same results as john doe.

### **Look For**

Select whether you'd like to find an Exact Match to the name you specified, or any name that Contains the partial name you provided in Email Address. For example, if you wanted to find all members who are named Jane, you would specify Jane in Name, and specify Contains.

### **Search In**

Specify whether you'd like to limit your search to This List, or All Your Lists. If you select All Your Lists, you will see the results for all lists for which you have admin rights and have access to.

## **Members: View Members: Find Members: Domain**

---

Enter the complete domain of the members you'd like to find. ListManager will show you the results of your search in the [Members: View Members](#) page.

## Members: View Members: Find Members: Segments

---

A drop-down box allows you to select the members in a particular segment. ListManager will show you the results of your search in the [Members: View Members](#) page.

Finding members by segment allows you to perform searches based on any segment you can create. Even if your license does not allow you to send to segments, you can still create segments and search for members who meet the criteria you specify. See [Segments](#) for more information.

## Members: View Members: Find Members: Status

---

A drop-down box allows you to select the members who have a particular membership status. ListManager will show you the results of your search in the [Members: View Members](#) page.

The membership statuses are:

### **Normal**

A normal member.

### **Confirm**

The person has requested to join this mailing list, has received an email message asking them to confirm their membership, but has not accepted the confirmation message. This person's membership is waiting for be confirmed. Once the confirmation message is received, the person's type will change to normal.

### **Confirm-Failed**

The person has requested to join this mailing list, but the confirmation message sent failed with a permanent, 500-level error. These errors are generally returned when the email address does not exist, but may also occur when the receiving mail server believes the confirmation message is spam and thus rejects it with a permanent error. To see which is the case, view the sending record for the confirmation message in Member: Edit Member: Information: View Mailings Attempted.

### **Private**

The person has requested to join this mailing list, but because this mailing list is set to private, their request to join is waiting for an administrator to approve it by changing their membership to normal. A private mailing list is one where requests to join the mailing list must be approved by a list administrator. When a mailing list is set to private, mailing list administrators who have Admin Mail set to Yes receive a short email notification message for each request to join the private mailing list.

### **Expired**

The member had their membership set to expire on a certain date. That date has past, so this person's membership has expired and is no longer active. If a membership has expired, a list admin may unexpire them by going into Members: Edit Member: Settings for that particular member, changing the member expiration date in the section and changing their membership status to "normal member."

**Held**

The member's email address was invalid, or bounced mailing list messages for several days. Therefore, their membership was held and their mail is no longer sent to their address until their status is returned to normal.

**Unsubscribed**

The member was a member of the list at one time, but has since unsubscribed.

**Referred**

The member was invited to join using a referral, but has not yet joined the list.

**Needs-Confirm**

The member will receive a message asking them to confirm their membership, and then their status will be set to Confirm.

**Needs-Hello**

The member will receive a message welcoming them to the list, and their status will be Normal.

**Needs-Goodbye**

The member will receive a message informing them they have left the list, and their status will be Unsubscribed.

## **Members: View Members: Find Members: Kind**

---

A drop-down box allows you to select the members who have a particular membership kind. ListManager will show you the results of your search in the [Members: View Members](#) page.

The membership kinds are:

**Mail**

As soon as someone contributes a message to the mailing list, the user will receive a copy of that message.

**Digest**

Each night, around 12:00 am, the user will receive a single email message containing all the messages contributed to the mailing list that day. At the top of the message will be a numbered list of the subjects in that digest, followed by the complete messages themselves. Note that the 12:00 a.m. mailing time is not configurable.

**MIME Digest**

The same as a digest, but in MIME format so that the individual messages' formatting is preserved. MIME digest is preferable if members are sending multipart messages, or messages with attachments.

#### **Index**

Each night, around 1 in the morning, the user will receive a single email message containing all the subject lines of all the messages contributed to the mailing list that day. If any of the messages interest the user, the bottom of the index gives the email command that will retrieve the bodies of the messages.

#### **Nomail**

No email is sent to the user. The user is free to go the web interface whenever they want, and read the full text of the messages there. This setting is also useful for people who want the ability to contribute to a mailing list, but do not care to see the contributions to the mailing list.

## **Members: View Members: Find Members: Member ID**

---

Enter the ListManager Member ID of the member you'd like to find. ListManager will show you the results of your search in the [Members: View Members](#) page.

## **Member History**

### **Members: View Members: Member History**

---

The Member History page allows you to see information on individual members, including tracking their exact activities, such as message opens, URLs clicked, clickstream events, etc.

This page is accessible by clicking the History link for an individual member on the [Members: View Members](#) menu.

Similar information on members is available on the [Members: Add/Edit Member: Member Settings](#) page.

### **Current Information**

---

#### **Name**

The name and email address of the member. Clicking the name will take you to the [Members: Add/Edit Member: Member Settings: Basics](#) page.

#### **Status**

The membership status of the member. A *normal* member is an active member who may receive mail; all other statuses are inactive. For more information on member statuses, see [Members: Add/Edit Member: Member Settings: Settings: Membership Status](#).

If a member's status is *unsub* (unsubscribed), you may view the mailing the member unsubscribed from (if available).

### **Kind**

The kind of membership held by the member. For more information on the kinds of memberships, see [Members: Add/Edit Member: Member Settings: Settings: Membership Kind](#).

### **HTML detected**

ListManager can detect whether a member is able to view email messages in HTML if HTML detection has been enabled for a mailing sent to the member. If ListManager has detected this member is able to view email in HTML, this value will be displayed as "true"; if not, it will be displayed as "false. These options will not appear until the member has received at least one mailing.

### **Preferred mail format**

The member's preferred mail format. If not specified by the member, this value will be "Text", for plain text email messages. Other options are "HTML" and "Multipart" (both text and HTML).

### **Member ID**

The internal ListManager Member ID number.

### **Mailings attempted**

Displays the number of mailings ListManager attempted to send to this member. for this member. For details about the attempted mailings and whether or not they were successfully delivered, click "view". This page is also accessible from [Members: Add/Edit Member: Member Settings: Information](#).

### **Mailings sent**

Displays the number of mailings sent by this member to the list. For details about these mailings, click "view" to be taken to the [Members: Mailings Sent](#) page, where the mailing and sending details can be accessed. This page is also accessible from [Members: Add/Edit Member: Member Settings: Information](#).

### **Surveys completed**

Displays a list of the surveys completed by this member. Clicking the link to the individual survey will take you to the [Reports: Surveys: Response](#) page, where individual survey responses can be analyzed.

### **Date joined**

The time and date the member joined the list.

### **Date unsubscribed**

The time and date the member unsubscribed from the list (if applicable). If available, a link to the mailing the member unsubscribed from will appear.

### **Date confirmed**

The time and date the member confirmed membership on the list (if applicable).

### **Date held**

The time and date the member was put on hold (if applicable).

## **Activity Tables**

---

Depending on the member's activity, other viewtables may appear beneath the Current Information table.

All viewtables sort results from most recent to oldest, and show a maximum of 100 results for that type of item. Note that if a member does not have any data for one of the following tables, it will not be displayed. For instance, if a member has not made any purchases, you will not see a Purchases table displayed. These tables can be exported to another file outside of ListManager by clicking on the spreadsheet icon on the upper right hand corner of each table.

### **Purchases**

Information about the member's recent purchases.

### **Interests**

Information about the member's recent interest events. Interest events will not show up as Clickstream events (below).

### **Clickthroughs**

All the recent URL's the member clicked through, and associated details.

### **Opens**

All the recent messages the member opened, and associated details.

### **Clickstreams**

All the recent clickstream events for the member, and associated details. If a clickstream event has an interest point or any stage information associated with it, it will appear in the Interest Events table (above).

### **Forwards**

All the recent mailings forwarded by the member, and to how many people. Note that to appear in the Forwards table, the message must be an HTML message with open tracking, and the recipient of the forward must have opened the message from a different TCP/IP address than the original recipient opened it from.

## **Members: View Members: Member History: Mailings Attempted**

---

The Mailings Attempted page provides a link between member information and the mailings attempted to be sent to a member, successfully or unsuccessfully with these members. From here, details about the outgoing mailings and sending details can be quickly accessed, providing details about each mailing associated with that member.

### **To reach the Mailings Attempted page**

1. In the left Navigation bar, click **Members**, and then click **View Members**.
2. Click the **History** command for the member you want.
3. Click the **View** button next to **Mailings Attempted**.

Click on the member name or member email address to access the [Members: Edit Member: Basics](#) page, where the member information, such as their name, email address, or admin status can be edited.

### **Finding Mailings**

The sorting options for the Member Mailings table are:

**Title**

The name of the mailing.

**Date**

The date and time on which the mailing was sent.

**Status**

The sending status of the mailing. The possible statuses are:

Not attempted

Retry

Success

Failure

Paused

Expired

Skipped

Aborted

**View mailing**

To view a particular mailing, click **View mailing** next to the mailing title. This takes you to the [Mailings: View Outgoing Mailing: Message Body](#) page, where details about the mailing, including the message body, [message header](#), [recipients](#) information, [log](#), and [mail queue](#) can be found.

**View sending details**

To see the recipient sending details associated with how the mailing was sent, click **View sending details** next to the main title. This includes [basics](#), [log](#), and [bounce message](#) information.

## Members: View Members: Member History: Mailings Sent

---

The Member Mailings page displays mailings a member has sent or attempted to send through the list. From here, details about the outgoing mailings and sending details can be quickly accessed, providing details about each mailing associated with that member.

**To reach the Mailings Sent page**

1. In the left Navigation bar, click **Members**, and then click **View Members**.
2. Click the **History** command for the member you want.
3. Click the **View** button next to **Mailings sent**.

Clicking on the member name or member email address to access the [Members: Edit Member: Basics](#) page, where the member information, such as their name, email address, or admin status can be edited.

**Finding Mailings**

The sorting options for the Member Mailings table are:

**ID**

The ID of the message in the incoming mail queue (inmail).

**Subject**

The subject of the message.

**By Email?**

Whether the message was sent via email or through the web interface.

**Date**

The date and time on which the mailing was sent.

**Subset**

The subset the mailing was sent to. If blank, it was sent to the entire list.

**View Mailing**

To view a particular mailing, click **View mailing** next to the mailing title. This takes you to the [Mailings: View Outgoing Mailing: Message Body](#) page, where details about the mailing, including the message body, [message header](#), [recipients](#) information, [log](#), and [mail queue](#) can be found.

## Ban Addresses

### Members: Ban Addresses

---

ListManager can automatically deny subscription requests and postings from addresses you specify by using bans. ListManager's bans can be used as a permanent suppression list, to prevent those who have complained about being sent email from you from being added to a list or from receiving future list postings.

Subscription requests from a banned address will be rejected, and administrators will not be able to add or import banned addresses.

Bans can be created for domains, user names, or complete email addresses. There is no "wildcarding" (e.g., "example.\*"). If a domain is banned, subdomains are banned as well (e.g., "example.com" bans "host.example.com").

You may enter bans one by one, or [import](#) a list of bans. Bans can be created for individual lists, sites, or for the entire server.

Server administrators have the option of *applying* bans. When **Apply Bans** is clicked, all addresses marked as bans will appear as "unsubscribed" after the start of the next ban reload cycle (this task is set to disabled by default).

Applying bans can also be done automatically, as a server [scheduled task](#).



There are three types of bans:

1. Always accept
2. Conditionally accept
3. Reject

### **Always Accept**

"Always accept" bans prevent other addresses from joining. **All other addresses will be rejected**, unless there are "Always accept" or "Conditionally accept" bans for them. If you want to restrict membership to a particular domain, use "Always accept". **Do not use "Always Accept" bans if you want other addresses to be able to join.**

Once an address matches an "Always accept" ban, no further checks will be done on it. Therefore, an "Always accept" ban overcomes a "Reject" ban.

For example, if you have an "Always accept" rule for example.com, but a "Reject" rule for joe@example.com, joe@example.com will still be able to join. If you do *not* want joe@example.com to join, use "Conditionally accept" for example.com. Those who do not have an example.com address will not be able to join (e.g., aol.com, yahoo.com, hotmail.com, etc.).

Note that "Always accept" ban rules require a domain.

### **Conditionally Accept**

"Conditionally accept" ban rules allow the conditionally accepted addresses to join, except those explicitly rejected with a "Reject" ban. **All other addresses will be rejected**, unless there are "Always accept" or "Conditionally accept" rules for them.

For example, if you have a "Conditionally accept" rule for example.com but a "Reject" rule for joe@example.com, everyone at example.com will be able to join *except* joe@example.com. Those who do not have an example.com address will not be able to join.

Note that "Conditionally accept" ban rules require a domain.

### **Reject**

"Reject" bans the specified addresses from joining, except those with an "Always accept" rule. This is the most frequently used ban rule.

For example, if you have a "Reject" ban for the address mary@example.com, mary@example.com will be rejected; all other addresses will be able to join.

### **Global Ban Server**

ISPs using multiple ListManager servers may choose to use one as a [Global Ban Server](#). These bans will not appear in the local list of bans, but when *apply bans* is clicked or scheduled on the local ListManager server, it will also check for bans on the Global Ban Server as well.

### **FCC Wireless Domains**

The United States government has specified strict rules regulating sending email to domains used by wireless devices. ListManager may automatically download the list of wireless domains maintained by the FCC and ban those domains from receiving email.

The URL for this list may be changed in [Utilities: Administration: Server: Server Settings: Security: Bans](#).

Note: ListManager will NOT download this list of domains to ban unless the [FCC Domains scheduled task](#) is enabled. To have these domains banned, you must either Apply Bans in Members: Ban Addresses or enable the Apply Member Ban Rules scheduled task.

## Viewing Bans

To view or edit a particular ban, click the user name or **Edit**. You will be taken to the [Members: Ban Addresses: Edit Ban](#) page.

You may change the order members are displayed by clicking on the up or down triangles on the column headings. The headings are:

### **Username**

The user name associated with this ban (everything before the @ sign in the email address).

### **Domain**

The domain associated with this ban (everything after the @ sign in the email address).

### **Applies To**

Specifies whether this ban applies to a particular list, site, or the entire server.

### **Type**

The type of ban: Always accept, Conditionally accept, or reject.

### **Created**

The date and time this ban was created

## Ban Options

For each ban, you have the following options:

### **Edit**

Edit this ban.

### **Copy**

Copy this ban. The User Name, Domain, and Type will be displayed. You may specify a list, site or server to copy the ban to.

### **Delete**

Delete this ban.

## Find Ban

Takes you to [Members: Ban Addresses: Find Ban](#), which allows you to search for bans.

## Show All

Displays all bans after searching for a ban

## Apply Bans

The server administrator has the option to *apply bans*. By clicking **Apply Bans**, all addresses affected by the current bans will be marked as unsubscribed. Bans will not be applied automatically unless you edit the apply bans [scheduled task](#) to do so.

## Import Bans

Lets you create [multiple ban rules](#) at once.

To search this table, click . To export this table as a CSV file, click .

# Members: Bans: New/Edit Ban

---

For complete information on how member bans work, and the member bans main page, see [Members: Bans](#).

## User Name

Enter the user name of the member that you want to ban. The user name is everything to the left of the "@" symbol in the email address. For instance, if the member to ban has an email address of Jane\_Trouble@example.com, enter "Jane\_trouble" in this field. Note that you can enter names in any case, but they are saved in lower case.

Only the user name portion of the email address (jane\_trouble), should be entered, as members cannot be banned on their actual name, only the user name portion of their email address.

The User Name field must be blank for "Always Accept" bans.

## Domain

Enter the domain of the member that you want to ban. This is everything to the right of the "@" symbol in their email address. In the above example, you would enter "example.com". The domain name can also be entered in any case, but will be saved in lower case. To ban a top-level domain, enter it without an initial dot (e.g., net)

To view the next two options, click **Advanced**.

## Type

There are three types of bans:

1. Always accept
2. Conditionally accept
3. Reject

If an address matches an "Always accept" ban rule, it is accepted with no further processing. **Addresses that do not match any "Always accept" or "Conditionally accept" ban rule are rejected.**

Records found in "Conditionally accept" will be accepted if no explicit reject information is found. Records found in "Reject" are rejected automatically, if matched. See [Members: Bans](#) for more information about ban types.

### Applies to

Set the list, site, or server, that that member ban applies to. The options you see here will depend on your privileges, whether you are a list, site, or server administrator. For example, if you are a site administrator, you will be able to create list or site bans, but not server bans. The Applies to field defaults to the current list.

For information on how to specify one server to handle all banned members, see [Utilities: Server: Server Settings: Advanced: Global Ban Settings](#).

## Members: Bans: Import Bans

---

For complete information on how member bans work, and the member bans main page, see [Members: Bans](#).

### Email addresses

Enter the complete email addresses you would like to ban, separated by a carriage return. Example:

```
john@example.com  
mary@example.com
```

Note that the email addresses may be upper or lower case, but will be saved in ListManager as lower case.

### Type

There are three types of bans:

1. Always accept
2. Conditionally accept
3. Reject

If an address matches an "Always accept" ban rule, it is accepted with no further processing. **Addresses that do not match any "Always accept" or "Conditionally accept" ban rule are rejected.** Records found in "Conditionally accept" will be accepted if no explicit reject information is found. Records found in "Reject" are rejected automatically, if matched. See [Members: Bans](#) for more information about ban types.

### Applies to

Set the list, site, or server, that that member ban applies to. The options you see here will depend on your privileges, whether you are a list, site, or server administrator. For example, if you are a site administrator, you will be able to create list or site bans, but not server bans. The Applies to field defaults to the current list.

For information on how to specify one server to handle all banned members, see [Utilities: Server: Server Settings: Advanced: Global Ban Settings](#).

## Members: Bans: Find Ban

---

When using ListManager's member bans as a suppression list, you may have a large number of ban rules. Using Find Ban will help you locate preexisting bans, and edit or delete them if desired.

Fill in as many fields as desired. For example, you may enter just the Domain field, and return all results with that domain.

Note that editing or deleting a ban, and then applying bans as a server admin will not cause banned addresses previously marked as unsubscribed to be resubscribed as normal members.

### **User Name (lower case)**

Everything before the @ sign of an email address, in lower case. No wildcards may be used.

### **Domain (lower case)**

Everything after the @ sign of an email address, in lower case. No wildcards may be used.

### **Type**

The type of ban rule. See [Members: Bans](#) for a complete description of the ban rule types.

### **Applies to**

Limits the search to a particular list, site, or searches the ban rules for the entire server.

## Apply Bans

---

The server administrator has the option to apply bans. When you click Apply Bans, all banned addresses appear as unsubscribed after the start of the next ban reload cycle. (This task is set to disabled by default.) Bans will not be applied automatically unless you edit the apply bans [scheduled task](#) to do so.

# Delete Members

## Members: Delete Members

---

ListManager gives you three ways to delete members through the web interface:

-Delete individual members by finding a member in [Members](#), and selecting delete next to the address you'd like to delete.

-Delete multiple addresses by selecting [Delete Many Members](#), and entering the email addresses you'd like to delete.

-Use Members: Find Members to search for the members you'd like to delete, and then use [Delete All in This View](#) to delete them.

## Members: Delete Many Members

---

Enter a list of email addresses you'd like to delete, separated by carriage returns.

Example:

```
bob@example.com  
jane@example.com
```

Note that many members can be deleted at once, if they have the same user name or the same domain name (or both). This can be done by using the \* (asterisk) symbol as a wildcard to replace the user name or domain name.

For instance, to delete all AOL members from your list:

```
*@aol.com
```

Or to delete all users named "joe":

```
joe@*
```

To delete anything related to AOL, that is, all users with the AOL domain:

```
*aol*
```

Once this is entered, ListManager will ask that you confirm that you do in fact want to delete the members, and will list all the members that will be deleted. Clicking **Delete** will then delete these members from the ListManager database.

Note: For case-sensitive databases such as Oracle, the wildcard search is also case-sensitive. It is not case-sensitive for Windows 2003 Server (MSSQL).

## Members: Delete All in This View

---

This feature allows you to delete all the members in the current view. You will be asked to confirm that you want to delete all the members in the current view, including those that could not be displayed due to the number of members. An SQL statement will also display showing you which members will be deleted.

This feature allows you to use the [Members: Find Members](#) feature to find a group of members with a certain feature, and then delete them in bulk. For example, you could create a [segment](#) that selects members whose top level domain is .gov. Then, you could use Members: Find Members to find all members who meet that criterion. Finally, you could use Delete All in This View to delete that group of members.

In order to prevent a list administrator from inadvertently deleting his/her own login rights, ListManager includes a checkbox titled **Don't delete list administrators..** This box will be checked by default. If it is checked, then all list administrators will NOT be deleted when the other members are. If the box is unchecked, then all list administrators, including your own login name, will be deleted.

## Edit Synchronization Settings

### Members: Synchronization Settings: Rules

---

ListManager can synchronize its data with other data sources using ODBC. These settings determine how ListManager will create, edit and delete members, and according to what [schedule](#).

#### Connection

Specifies the connection ListManager should use when synchronizing data for this list. The connections may be specified by a server administrator in [Utilities: Administration: Server: Database: External Database Connections](#).

#### How Will Members Be Created?

Specifies how new addresses will be added to this list. The options are:

##### **Normal Status, No Notification**

Add the addresses with a Membership Status of Normal, but do not send a hello or confirmation message. These members will receive normal list mailings.

##### **Normal Status, Send Hello Notification**

Add the addresses with a Membership Status of Normal, and send them the hello message as specified for your list in [Utilities: Document Associations](#). If no document is specified here, new members will receive a generic message from ListManager.

##### **Confirm Status, Send Confirmation Request**

Add the addresses with a Membership Status of Confirm, and send them the confirmation message as specified for your list in [Utilities: Document Associations](#). If no document is specified here, new members will receive a generic message

from ListManager. These members will not receive normal list mailings until they confirm their memberships.

#### **Use Status as Specified (query must include MemberType\_ field)**

Import the addresses using the setting specified in the MemberType\_ column. The MemberType\_ column specifies whether the Membership Status is *normal* (that is, may receive mail), or is inactive, due to being unsubscribed, held, etc. See [Members: Add Members: Add Member: Settings: Membership Status](#).

### **How Will Members Be Updated?**

Determines how ListManager will handle duplicate email addresses. ListManager cannot add the same email address twice to the same list. These settings specify whether ListManager skips any duplicates it finds or updates its data with the data in the external data source. The options are:

#### **Do Not Update (Leave Unchanged)**

ListManager will skip duplicate email addresses, and leave the data for the address in its database unchanged.

#### **Update All Available Fields Except Membership Status**

ListManager will update all data for duplicate email addresses *except* for the Membership Status (MemberType\_), so members who have unsubscribed or been held will not be reset to normal.

#### **Update All Data Including Membership Status (if MemberType\_ Available)**

ListManager will update all data for duplicate email addresses *including* the Membership Status (MemberType\_), so members who have unsubscribed or been held may be reset to normal. **IMPORTANT WARNING: This setting can result in mail being sent to members who have unsubscribed, and should not be used if ListManager is used to manage unsubscribed members and other inactive members.**

### **How Will Members Be Removed?**

Specifies how ListManager should handle addresses that are not included in the external database. The options are:

#### **Do Not Change Membership Status of Members Not in External Data Source**

ListManager ignores members that are currently in its database but not in the external database. These members will receive mail according to their Membership Status (MemberType\_).

#### **Quietly Unsubscribe**

ListManager quietly unsubscribes members that are in its database but not in the external database, so these addresses do not receive mail. If the member is included in subsequent synchronizations, its Membership Status will be reset to *normal* unless the member unsubscribed directly.

### **Terminate Synchronization**

Sets the number of consecutive invalid email addresses to end the synchronization process. For instance, you may want to terminate synchronization after 10 invalid email addresses, and check your formatting to see why so many addresses are failing. You



can also set it to "Do not terminate import due to malformed addresses" if you'd like to ignore any bad addresses and process the import as-is.

## Members: Edit Synchronization Settings: Schedule

---

These settings specify when ListManager will synchronize with the external database source specified.

Note that the server administrator establishes a [scheduled baseline frequency](#) to check for synchronization--by default, once every 30 minutes. The schedule established here works within this scheduled frequency.

### Frequency

Specifies how frequently ListManager will automatically synchronize the list member data with the external database. The options are:

#### Never

ListManager will never synchronize automatically. You may synchronize by going to [Members: Synchronize Now](#), or by setting your list to synchronize before mailing in [Mailings: New Mailing: Recipients](#).

#### Once Per Day

ListManager will synchronize with the external database once per day at the earliest opportunity.

#### Once Per Week

ListManager will synchronize with the external database once per week on the day you specify at the earliest opportunity.

#### As Frequently as Possible

ListManager will synchronize with the external database as frequently as it can, subject to the limits in Utilities: Administration: Server: Server Settings: Scheduled Tasks.

Note that frequent synchronization may cause poor performance.

### Time of Day

Specifies what time of day ListManager should attempt to synchronize, given that a frequency has been selected.

#### Any Time of Day

ListManager will attempt to synchronize as early as it can, subject to the frequency specified above and to the limits set by the server schedule.

#### During the Hours of xx-xx --xx-xx (May Pass Through Midnight)

Specifies the window to begin synchronization.

Example:

23:00--02:30

This setting allows the database to start synchronization between the hours of 11:00 pm and 2:30 am.

If the frequency for synchronization is set to once per week, the synchronization window closes on the day specified. For example, if the Frequency is once a week on Sundays, and the Time of Day is between 23:00--2:30, synchronization may begin between 11:00 pm Saturday night and 2:30 am Sunday morning.

**NOTE** If the server is not scheduled to check for synchronization during this time, no synchronization will occur. Also note that this setting does not affect the duration of the synchronization; once started, synchronization will proceed until it is completed, regardless of the window specified here.

## Synchronize Now

---

When clicked, Synchronize Now will synchronize your ListManager data with your external data source according to your settings in Members: [Edit Synchronization Settings](#).

If it is necessary to prevent list administrators from using Synchronize Now, Server Administrators may use [Permission Groups](#).

# Content

## Content

---

A mailing has two parts: the *content*, or message you want to send, and a [segment](#), or group of recipients who should receive the message. When you create a new [mailing](#), you can either type the content you'd like to send directly into the mailing, or insert content you've already created.

Creating content instead of entering your message into every mailing has many advantages. You can:

- Create a unit of content once, then use it in multiple mailings.
- Personalize your mailing by inserting [mail merge fields](#) and [conditional text](#).
- Add [clickthrough tracking URLs](#), and track how often they've been clicked.
- [Attach documents](#) to your mailings.
- Create [templates](#) to make designing newsletters easy. Or, use one of the built-in templates when you [Create Content from Template](#).
- Create list, site, and server documents, which define messages that are sent to users based on certain list-related actions. See [Utilities: Automated Messages: Document Associations](#) for more information.
- Import a [survey](#), [web page](#), or [referral form](#) into your content.

If you are sending out a message only once, and don't want or need to use these features, you may find it easier to skip this step and [Create a New Mailing](#).

## The Main Content Page

---

### [Content Overview](#)

#### Finding Content

Up to twenty Content items are displayed on the main content page. To view more than twenty content items at a time, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of content items at a time. To see fewer content items, click **Show fewer**. Click on **Next** to see the next page of items, or **Previous** to see the previous page.

You may change the sorting order of the content by clicking the up or down triangles next to Name and Description. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a).

#### Viewing or Editing Existing Content

##### To view a content item

Click the content name.

-or

Click the **Edit** command for the content.

### Creating a Mailing from Content

To create a mailing from a content item, click the **Create Mailing** command from the content you want.

### Testing Existing Content

Click the **Test** command for the content you'd like to test. ListManager will show you the header, text message and HTML message.

### Copying Content

Click the **Copy** command for the content you'd like to copy. ListManager will show you the old name and description, and will ask you the new name and description you'd like. It will also ask you which list to which you'd like to copy the content.

### Deleting Content

Click **Delete** next to the content you'd like to remove. ListManager will ask you if you're sure before deleting the content.

### Creating Content

Click **Create New** to be taken to [Content: New Content](#).

### Creating Content from a Template

Click create from template to be taken to the [Content: New Content from Template](#) page. On this page you may select from several premade templates, or from your own content that you have created as a template. Clicking *preview* will allow you to see what the content template looks like. Clicking on OK will use that template for your new content.

To search this table, click . To export this table as a CSV file, click .

## Content: Copy Content

---

### To copy content

1. On the [main Content page](#), click the **Copy** command for the content.
2. To change the name, edit the text in the **New name** box.
3. To change the description, edit the text in the **New description** box.
4. To copy the content to a new list, select the list in the **Destination list(s)** box.
5. Click the **Copy** button.

## Content: Test/Preview Content or Template

---

This page shows you what your content or template will look like.

**Note** Mail merge tags (text with %% around them) will not be merged. To see what a message sent to an actual member will look like, create and [test a mailing](#).

### **Header**

The SMTP header of the content.

### **Text Message**

The text portion of your content, if any. The actual message as received by list members might look different, depending on their email client settings.

### **HTML Message**

The HTML portion of your content, if any. The actual message as received by list members might look different, depending on their email client settings.

In the HTML message, clickthrough links will be rewritten so that you can test their destination. For example, a link that you created that looks like this:

```
%%track "http://www.lyris.com"%%
```

Will be rewritten to look like this:

```
/cttest?url=http://www.lyris.com
```

Normally, you won't see that they have been rewritten because they will be disguised in the HTML as images or clickthrough text.

### **Attachments**

Displays any attachments associated with this content. If there are no attachments, it will say "none." Note that attaching or removing an attachment from content must be done in the [Content: New/Edit Content: Advanced tab](#) page.

## **Saving and Testing Content**

---

### **Save**

Saves your content, and takes you to the [main Content page](#).

### **Save and Test**

Saves your content, and takes you to the [Test Content](#) page.

### **Create Mailing**

Saves your content and then automatically starts a new mailing.

### **Cancel**

Exits without saving any changes.

# Saving and Testing Your Template

---

## Save

Saves your template, and then takes you to the [main Content page](#).

## Save and Test

Saves your template, and then takes you to the [Test Template](#) page.

## Cancel

Exits without saving any changes.

## Creating New Content

### Creating Content -- Overview

---

To send a message to your list, you may first create the *content* of the message. Once you've created content, you may combine it with a list or [segment](#) to create a new [mailing](#).

The Content: Edit Content screen is exactly like the Content: New Content screen.

**NOTE** Javascript is not supported in the HTML Editor.

#### Creating New Content

1. In the left Navigation Bar, click **Content**, then click **View Content**, and then click the **Create New** button. This takes you to the Content: Create New Content : Essentials tab.
2. Enter a **Name** and **Description** to identify the content.
3. Enter the email address of who the message should appear to be **From:**. By default, your email address will appear there. To customize the message, select [Insert Field](#) to insert a mail merge field or an [autoresponder](#) address.
4. Enter the email address of who the message should be **To:**. By default, the To: field is set to %%nameemail%%, which will merge in the name and email address of each recipient. To customize the message further, select [Insert Field](#) to insert a mail merge field.

The To: field does not actually select the message's recipients. When building your mailing, you'll specify the segment or lists to whom you'd like to send the message.

5. Enter the **Subject:** of the message. Recipients will see this line as the subject of the message they receive. To customize the subject line for each recipient, select [Insert Field](#) to insert a mail merge field.
6. Select the [Text Message](#) or [HTML Message](#) tab, and type or paste the contents of your message in the field.

You may create just a text or HTML body, and that is what will be sent to your recipients. Or, you can create both, and send a message that has both text and HTML. This format is called multipart-alternative, and ListManager will create the correct headers and boundaries automatically. Recipients who can see HTML will only see your HTML message; those who can't, will see the text.

You can customize your message for every recipient by selecting [Insert Field](#) or [Insert Condition](#). Track which URLs recipients click by using [Insert URL](#).

7. Select the [Advanced](#) tab for advanced options such as adding headers or joining other tables.
8. To select a different character set, click the [Internationalization](#) tab.

9. Do one of the following:

To save your content: click **Save**. This returns you to the main [Content](#) page.

To save your content and see what it would look like in a message: click **Save and Test**.

To create a mailing using your content: click Create Mailing.

## Editing Content

Editing content is much like creating new content. Note that you cannot edit the built-in content templates. To edit preexisting content, follow these steps:

1. Go to the [Content](#) main page.
2. Click the name of the content you'd like to edit or click the **Edit** command for the content.
3. Edit the content as desired.
4. Click **Save**, or **Save and test**.

**Important note for users of earlier versions of ListManager:** The list, site or server message wrapping will not be automatically included to your message if you create it through the ListManager administrator GUI. Please remember to add these instructions

to your content or mailing, or send the message to the list via email. See [Content: Insert Field: Unsubscribe](#) to see how to do so quickly and easily.

**NOTE** You can also [create new content from a template](#).

## **Content: New/Edit Content: Essentials**

---

The fields on the Essentials page are required for all content you create. Generally, any message you send will also have a text and/or html message as well. For a step-by-step guide to making content, see [Content: New Content](#).

### **Content Name**

Select a name to identify your content. This name is not seen by message recipients, so label the content in a way that will help you to identify it later in the Content main page.

### **Description**

Describe your content. This description is not seen by message recipients, so describe the content in a way that will help you to identify it later in the Content main page.

### **From:**

The name and email address that should appear in the message's From: line. By default, your email address will appear in this field.

Examples of valid values for this field:

```
bob@example.com
Bob Smith <bob@example.com>
bob@example.com (Bob Smith)
"Bob Smith" <bob@example.com>
```

To customize the message, select [Insert Field](#) to insert a mail merge field or an [autoresponder](#) address.

### **To:**

The name and email address that should appear in the message's To: line. By default, the mail merge tag %%nameemail%% appears in this field, which will merge in each recipient's name and email address. If you'd like to have a name and email address, put the name in quotation marks, and the email address in angle brackets. Example:

```
"Jazz List" <jazztalk@lists.example.com>
```

To customize the message, select [Insert Field](#) to insert a mail merge field.

The To: field does not actually select the message's recipients. When building your mailing, you'll specify the [segment](#) or lists you'd like to send the message to.

### **Subject:**



The text which will appear in the message's Subject: line. To customize the subject line for individual recipients, select [Insert Field](#) to insert a mail merge field.

[Learn about saving and testing content.](#)

## Content: New/Edit Content: HTML Message

---

In the **HTML Message** tab, you can use the HTML Editor to create and edit the HTML that will be included in your email.

[Learn more about using the HTML Editor.](#)

### HTML Editor Browser Support

- Internet Explorer 6 Service Pack 2 and Internet Explorer 7
- Firefox 2

### Notes

- Not all email clients will show the background of your message, so it may be best to use a white background for your HTML message.
- Not all email clients can read HTML, so it's a good idea to include a [Text Message](#). A message that includes both text and HTML is called multipart-alternative format; it ensures that recipients who can read HTML see only HTML, but those who cannot see the plain text message.
- Additional message header and footer information can be added to the message if enabled in [Utilities: List Settings: Web Created Content: Insert Headers and Footers](#).
- You can include a link that recipients click to see the HTML message in a web browser. The tag %%url.mailing%% merges a unique link for each recipient which takes the recipient to a fully merged version of the message. Note that [archiving](#) must be enabled for the list.

**IMPORTANT NOTE** Javascript is not supported in the HTML Editor.

[Learn about saving and testing content.](#)

## Content: New Content: Images

---

If you have already placed images in the HTML Message tab, you can replace and resize them in the Images tab.

### To expand a folder and view its contents

On the right side under **Image Library**, click the folder name. To collapse it, click it again.

### To replace an image the workspace area with one from the Image Library

1. On the right side under **Image Library**, navigate to the folder that contains the image you want.
2. To preview an image, click the **view image** command beneath the image.
3. Drag the image you want to use and drop it over the image you wish to replace.

#### To resize an image in the workspace area

1. Click the image.
2. Drag one of the resize handles located along its border.

**NOTE** To resize the image vertically (in other words, make it taller or shorter), drag the handle located on its bottom border up or down.

#### To add, edit and delete images in the Image Library

Click the **Manage Library** button.

[Learn more about the Image Library](#)

#### To refresh the Image Library

Click the **Refresh** button. This allows you to see any images that have been added from another computer.

#### To hide the Image Library

Click the handle located along the right edge of the workspace area.



To show the Library, click the handle again.

[Learn about saving and testing content.](#)

## Content: New/Edit Content: Text Message

---

For a step-by-step guide to making content, see [Creating Content -- Overview](#).

### Text Message

The plain-text contents of this message.

Text copied and pasted from word processing programs such as Word may include extra characters, so it should be pasted into a plain-text editor first before being copied into the Text Message box.

If your content also includes an [HTML message](#), your message will be sent out with both text and HTML. This kind of message is called multipart-alternative format, and it ensures that recipients who can read HTML see only HTML, but those who can't see the plain text message.

Additional message header and footer information may be added to the message if enabled in [Utilities: List Settings: Web Created Content: Insert Headers and Footers](#).

## Button Options

### Show More

Click to increase the number of lines visible in the message body.

### Show Less

When visible, click to decrease the number of lines visible in the message body.

### Import File

Imports an HTML file into your HTML message body. File types not in HTML format cannot be imported.

Make sure your imported HTML uses complete paths, not relative paths, to images.  
Example:

Wrong:

```
/img/lyris.gif
```

Right:

```
http://www.lyris.com/img/lyris.gif
```

**NOTE** The Import File feature should not be used to attach documents to the message; use [New Attachment](#)

### HTML to Text

Converts an HTML message into text. Any formatting that was applied in the HTML Message tab is lost in the Text Message tab; however, special characters will appear before and after text to indicate that it was formatted. For example:

\*Text that had Bold formatting will have asterisks before and after it, like this.\*

\_Text that was in Italics will have underscores before and after it, like this.\_

**NOTE** If you already have a text body, converting the HTML to text will overwrite the preexisting text body.

### Insert Field

[Insert Field](#) gives you the option to insert:

- Mail merge fields (e.g., email address, first name)
- Database fields
- Email unsubscribe instructions
- Autoresponder addresses

### Insert URL

[Insert URL](#) gives you the option to insert:

- A single clickthrough tracking URL
- Trackable text
- A URL to confirm membership (used in a confirmation document)

- Unsubscribe URL
- Member profile URL
- Survey URL
- Referral form URL
- The URL to a web page to insert (web fetch)

To personalize the message, click on [Insert Field](#) to add a mail merge tag.

### Insert Condition

[Insert Condition](#) lets you insert conditional (dynamic) content; this lets you send recipients customized messages.

The [Tools](#) button lets you:

- [Convert](#) your content so that it is AOL-compliant.
- [Validate](#) URLs, and check for scripts, including those AOL-incompatible
- [Reformat](#) text to be word-wrapped, or to make the HTML section AOL-compliant

### Preview

[Shows you](#) what your content will look like.

[Learn about saving and testing content.](#)

## Content: New/Edit Content: Advanced

---

For a step-by-step guide to making content, see [Content: New Content](#).

The Advanced Headers page allows you to join to other tables, add additional headers, specify the language for informational purposes, and view the date this content was created.

### Join Other Tables

By default, ListManager only has access to its own database tables. To access data in other tables in your database, list the table names here, separated by commas. The standard members table is already included, and need not be specified. The fields in the tables specified here will be available for mail merging and conditional content.

Example:

```
demographics.customers, demographics.phonenumbers
```

Note that in order for the data to be pulled in properly the content must be sent to a segment that specifies how ListManager should join to it. See [Joining to Another Table](#) for more information.

### Attachments

The file names of your attachments are listed here.

#### **To attach a file**

Click the **Attach File** button. You will be taken to [Content: New Attachment](#), where you can add an attachment.

#### **To remove a document already attached to the content**

Click the **Remove** command to its name.

#### **To view an attachment**

Click its name.

#### **Additional Headers**

The message header is the part of the message that describes whom the message is from, whom it is addressed to, how the message should be displayed, and so forth. ListManager creates the correct header for your message automatically.

The optional text you specify as Additional Headers will be appended to the end of the message header of mailings created with this content. A message header text has the form of Key: Value.

If you want to add text to the header that is not a standard email header, you should prefix your key name with X- so that it does not interfere with normal operation of electronic mail. For example:

*X-Legal: Contents Copyright 1997 Example Corp Ltd.*

Note: All [document association messages](#) will appear as coming "FROM: Lyris ListManager". This can be overwritten here by adding other headers.

Note: If headers or footers are defined at multiple levels, i.e. server, site, or list, *each* header/footer will be added; one will not overwrite the other.

#### **Date Created**

The date this content was originally created. For informational purposes only.

[Learn about saving and testing content.](#)

## **Content: Attach File**

---

You can attach a file to content you are creating or editing. The **Attach File** button is located on the [Advanced tab](#).

#### **To attach a file**

1. Click the **Attach File** button.
  2. In the **Select File** box, type the full path to the file
- or-
- Click **Browse**, and then navigate to the file you want.
3. Click the **Attach** button.

**NOTE** You can view the attachment by clicking its name.

## Content: New/Edit Content: Internationalization

Creating content in an alternate character set requires that you have that character set installed on your system and that you have a means of editing or entering your message in that character set. Your web browser may be capable of converting Unicode to whatever character set you have selected for the content but you must be sure that there weren't any characters entered that don't exist in the specified character set. Otherwise they will show up incorrectly.

When this content is imported to a mailing, you will see the same additional charset/encoding related settings in the mailings page; it is imported as any other content would be imported. You can also create a mailing with international characters directly, without importing content. See [Mailings: New Mailing: Internationalization](#) for more information.

### **Character Set**

Before you enter any content into the web interface you must select the character set that you want to use for this content. If the character set you want to use does not exist in the drop-down listbox, your server administrator can add it in the [Utilities: Administration: Server: Internationalization and Localization: International Character Sets](#) page.

The character set for new content will default to the character set used by the web interface for the current language.

There are two ways to choose a character set:

1. Click the **Character Set** box and choose a set from the list.
2. Import HTML into your content that has a meta tag which sets the character set. That character set will be selected in the Internationalization tab and used for the content. Example:

```
<meta content="text/html; charset=iso-2022-jp" http-equiv="Content-Type" />
```

### **NOTE**

- If there is text in the **Text Message** tab when you choose a new character set, that text will be corrupted. Always choose your character set before entering a text message.

## Text and HTML Sections Encoding

The default setting for **Text section encoding** and **HTML section encoding** is **quoted-printable**. The encoding options can be left alone, in general. If you are pasting in text that you know is already encoded differently, you can choose that encoding and select **already-encoded** for that section.

After selecting the character set for your content, you can now enter in your text. When you select any other tab in the content editor, the web browser will be set to use the character set that you defined. This is required to avoid character set conversions that are done by the web browser. These generally result in the loss of characters that aren't in the browser's character set.

Note that if the character set of the content you are writing doesn't contain characters that your web interface requires, the web interface may display some wrong characters while you are in the content editor. For example, if your web interface is in French and you are composing a message in Japanese, some special accented characters in the web interface may show up incorrectly. When you leave the content editor, the web interface will return to normal. This is due to the fact that the web browser cannot display text in two different character sets at the same time. The exception is Unicode, which is currently not supported for content editing.

You can use international characters in the From, To, and Subject fields but it isn't recommended. Email clients might not display these fields correctly because the character set of those fields may not be available in the message overview. Also, they must be specially encoded and not all mail clients are able to decode encoded header lines.

The Name and Description should contain only standard ASCII characters since these fields are displayed in parts of the web interface that may not be displayed in the same character set.

If you are pasting in text or HTML that includes extended characters you should determine whether or not the text you are pasting is actually in that character set. If you are pasting from a plain text or plain html document, the character set may not be visible in the editor you are copying from. If you paste them into the content editor, they may not show up correctly after you save your message. That is because the character set that you pasted in was incompatible with the one defined for the content. You can work around this problem by entering the text before setting the character set in the Internationalization tab. Once your text is entered, you can change the character set and the content body fields will then be displayed with the correct characters.

[Learn about saving and testing content.](#)

## Content: Create New Content From Template

---

Templates are easy ways to preformat content. On the **Create New Content From Template** page, you can choose a template to use as a starting point for creating content

### To choose a template

1. To choose a built-in template, click the box that displays **Your Templates** and choose **Built-In Templates**. Otherwise, leave the setting at **Your Templates**.
2. Click the **Select** command for the template you want.

Next: [Working in the Essentials tab](#).

## Content: Insert Field

### Content: New Content: Insert Field

---

The insert field area allows you to quickly and easily personalize messages for every recipient by inserting information from your database directly into your content.

It also allows you to insert frequently used email addresses, such as the unsubscribe email address and email addresses for [autoresponders](#). In addition, you can add information about [unsubscribing from your list](#) quickly and easily.

#### Personalizing Content: Including the Recipient's Name with Mail Merge Field

A common way people personalize messages is to include a field which merges in the recipient's name.

1. Select the **Text Message tab** in [Content: New Content](#).
2. Click *insert field*.
3. Click the **Recipient Fields** box, and then select **Recipient's First Name**.
4. Click **Insert**. You will be returned to the message you were composing. The merge field will be included as part of your message:

```
%%firstname%%
```

Ed Kaminsky will see

```
Ed
```

If a member doesn't have a name, their email address will be merged in. For example, shirley@example.com didn't sign up with a name. Instead of her name, she'll see:

```
shirley@example.com
```

**Note** You can supply an alternate name which will be inserted in the message if there is no first name for the recipient. To do so, insert a space after the "firstname" text, and then type the alternate name. For example:



**Dear %%firstname Member%%,**

In this case, if the recipient does not have a first name, his email will read:

**Dear Member,**

The Mail Merge Fields tab allows you to merge in commonly used email addresses, basic information about the recipient, and dates concerning their membership. See [Content: Insert Field: Mail merge fields](#) for more information about the kinds of fields available on this tab.

### **Personalizing Content: Including Additional Recipient Information with Database Fields**

Depending on how your administrator has configured ListManager, you may have more data about your recipients available, which may be merged in using the Insert Field screen. Let's say you have an additional field in your database which records each recipient's type of pet, and you'd like to include that information in the message.

1. Select the **Text tab** in [Content: New Content](#).
2. Click *insert field*.
3. Select the **Database Fields** tab.
4. Select the field you'd like to merge into your message. In this example, you'd select the field name "pet" in the **Text Fields** drop-down box.
5. Click on **Insert**. You will be returned to the message you were composing, and the merge field will be inserted at the end of your message. You may then continue composing your message. For example:

```
Your favorite %%pet%% will love our specials!
```

In this example, the merge field %%pet%% will merge in each member's type of pet.

See [Content: Insert Field: Database Fields](#) for more information.

### **Adding Email Addresses: Inserting the Recipient's Email Address**

Instead of having your message addressed to the list's email address, it's a nice touch to have the message addressed to each individual recipient. Using a merge field allows you to make every message sent be individually addressed. By default, the merge code %%nameemail%% merges in the name and email address of each recipient. If you would like only the email address merged in, follow these steps.

1. Select the **Essentials tab** in [Content: New Content](#).

2. Click *insert field* next to the **To:** box.
3. Select **Recipient's Email Address** from [Content: Insert Field: Mail Merge Fields: Recipient Fields](#).
4. Click on **Insert**. You will be returned to the Content: New Content: Essentials screen, and the merge tag will be inserted into the To: field:

```
%%emailaddr%%
```

In this example, the message would then be addressed to each recipient.

### Adding Email Addresses: Inserting an Autoresponder Address

An autoresponder is a ListManager address which automatically replies with a message. It's sometimes useful to have an autoresponder in the From: line of your message, so that replies to the message receive an automatic message with information about how to unsubscribe, say, or how to contact your sales department. For this example, you'll need have already created an [autoresponder](#).

1. Select the **Essentials tab** in [Content: New Content](#).
2. Click *insert field* next to the **From:** box.
3. Select the [Content: Insert Field: Autoresponders tab](#).
4. Select the autoresponder address you'd like replies to the message to go to.
5. Click on **Insert**. You will be returned to the Content: New Content: Essentials screen, and the autoresponder address will be inserted into the From: field.

See [Content: Insert Field: Autoresponders](#) for more information.

### More Information About Personalizing Messages in ListManager

Inserting a field or a [condition](#) is the easiest way to personalize your message. If you'd like to learn more about message personalization and scripting, see [Message Personalization and Scripting](#).

## Content: Insert Field: Mail Merge Fields

---

The Mail Merge Fields tab allows you to merge in email addresses and recipient information. For a step-by-step guide to inserting fields, see [Insert Field](#).

## Email addresses

This drop-down box allows you to insert an email address into your message.

### Unsubscribe from this list

The merge tag %%email.unsub%% will be inserted into your content, and will be converted into a unique unsubscribe mail merge tag for each recipient. Example:

```
leave-141-4323P-@example.com
```

Only member 4323 will see this address. When email comes into ListManager with this address, it will unsubscribe that member, and record which mailing prompted the member to unsubscribe. The final "P" on the address is a "check character", ensuring that malicious people cannot unsubscribe others. For example, if someone changes the number to something else, say "4000", by mailing to "leave-141-4000P-@example.com", ListManager will see that this number has been tampered with, because "P" is not the correct "check character" for the number "4000". In this case, ListManager will interpret the message as if it were sent to "leave-jazztalk@example.com" and unsubscribe the sender of the message.

### Unsubscribe from all lists

The email address to which a recipient should send mail in order to unsubscribe from all lists on your server. The merge tag %%email.purge%% will be inserted into your content, which will be translated into purge@the-hostname-of-your-server.com.

## Confirm Membership for This List

The email address to which a recipient should send a message in order to confirm membership to a list. The merge tag %%email.confirm%% will be inserted into your content, which will merge in the unique confirmation email address for a prospective member. The confirmation email address or URL should be included in document content that will be sent as a confirmation message after someone subscribes to a list.

### Recipient's email address

The email address of the recipient. The merge tag %%emailaddr%% will be inserted into your content, which will cause the email address of the recipient to be merged into your message when sent.

### Recipient's name And email

The full name and email address of the recipient. The merge tag %%nameemail%% will be inserted into your content, which will cause the name and email address of the recipient to be merged into your message when sent. If no name exists for the recipient, only the email address will be merged in. This field is recommended for your content's To: field.

### Owner-Listname email address

The owner-listname@ email address. The merge tag %%email.owner%% will be inserted into your content. If you'd like for your list members to be able to contact you without giving out your email address, this address will automatically forward all correspondence to it to anyone who is set to get [list administrator mail](#).

Email address to post to list

The email address to which discussion list members should send their messages.  
The merge tag `%%email.list%%` will be inserted into your content.

## Recipient Fields

This drop-down box allows you to insert basic information about recipients to insert into your message. If you have custom information in your database, merge it in from [Content: Insert Field: Database Fields](#).

Recipient's email address

The email address of the recipient. The merge tag `%%emailaddr%%` will be inserted into your content, which will cause the email address of the recipient to be merged into your message when sent.

Recipient's first name

The first name of the recipient. The merge tag `%%firstname%%` will be inserted into your content, which will cause the email address of the recipient to be merged into your message when sent. If the recipient doesn't have a name recorded, the email address will be merged in.

**Note** You can supply an alternate name which will be inserted in the message if there is no first name for the recipient. To do so, insert a space after the "firstname" text, and then type the alternate name. For example:

**Dear %%firstname Member%%,**

In this case, if the recipient does not have a first name, his email will read:

**Dear Member,**

Recipient's full name

The full name of the recipient. The merge tag `%%fullname%%` will be inserted into your content, which will cause the email address of the recipient to be merged into your message when sent. If the recipient doesn't have a name recorded, the email address will be merged in.

### Recipient's Name and Email

The full name and email address of the recipient. The merge tag `%%nameemail%%` will be inserted into your content, which will cause the name and email address of the recipient to be merged into your message when sent, in the format *name <email>*. If no name exists for the recipient, only the email address will be merged in. This field is recommended for your content's To: field.

Recipient's password

The recipient's password cannot be merged into a message. If selected and merged, the password displayed will be encrypted. Use the tag `%%url.resetpassword%%` to send recipients a link to reset their passwords.

Lists recipient is member of

All the lists the recipient is a member of on this ListManager server. The merge tag `%%whatlists%%` will be inserted into your content, and it will merge in all the

lists the recipient is a member of into the message when sent. This field is useful in a [hello document](#) welcoming members to new lists.

Note that this tag should not be used in the Subject: line of a message or document, as it will force some of the email headers into the body of the message.

#### Recipient's unconfirmed lists

All the lists the recipient has subscribed to, but not yet confirmed their membership for on this ListManager server. The merge tag `%%whatlistsunconfirmed%%` will be inserted into your content, which will cause all the lists the recipient hasn't confirmed to be listed in the message. This field is useful in a confirmation document sent when prospective members sign up for a double opt-in list.

Note that this tag should not be used in the Subject: line of a message or document, as it will force some of the email headers into the body of the message.

#### Member ID

The recipient's unique ListManager ID. The merge tag `%%memberid%%` will be inserted into your content, which will cause the recipient's unique member ID to be merged into the message when sent.

## Content: Insert Field: Database fields

---

The Database Fields tab allows you to merge in information about your list members directly from your members database table. The default ListManager member fields will always be displayed here. If you have added additional fields to your members table, or are using a foreign members table, those field names will also be visible here.

The fields are divided into three types: text fields, number fields, and date fields.

### Text Fields

This drop-down box allows you to insert a text or text and numeric field into your message. The fields available for mail merge are drawn from your ListManager members table. You may have ListManager use fields from other tables if you specify them in [Content: New Content. Advanced](#).

Described here are the default ListManager member fields available; consult with your database administrator about additional fields available to you.

#### **Additional\_**

Additional information about the recipient which you've added. The tag `%%additional_%%` will be inserted into your content.

#### **Comment\_**

Comments about the recipient which you've added. The tag `%%comment_%%` will be inserted into your content.

#### **Domain\_**

The domain portion of the email address (e.g., lyris.com). The tag `%%domain_%%` will be inserted into your content.

**EmailAddr\_**

A recipient's full Internet email address. The tag %%emailaddr\_%% will be inserted into your content.

**Fullname\_**

The full name of this recipient . The tag %%fullname\_%% will be inserted into your content. If no name is available, the email address will be inserted.

**List\_**

The name of the list this recipient is a member of. The tag %%list.name%% will be inserted into your content.

**MailFormat\_**

The type of mail the member has opted to received, whether 'M' (multipart-alternative, the default), 'T' (text) or 'H' (HTML). The tag %%mailformat\_%% will be inserted into your content.

**MemberType\_**

The [membership status](#) of this member, whether 'normal', 'confirm', 'private', 'expired', 'held', or 'unsub'. The tag %%membertype\_%% will be inserted into your content.

**Password\_**

The recipient's password. If the recipient has no password, the field will be blank. The tag %%password\_%% will be inserted into your content.

**Subtype\_**

The type of messages this recipient is set to receive, whether digest, index, nomail, or mail. The tag %%subtype\_%% will be inserted into your content.

**Userid\_**

The user ID information defined by you, such as a key back to another database. The tag %%userid\_%% will be inserted into your content.

**Number Fields**

This drop-down box allows you to insert a numeric field into your message. The fields available for mail merge are drawn from your ListManager members table. You may have ListManager use fields from other tables if you specify them in [Content: New Content. Advanced](#).

Described here are the default ListManager member fields available; consult with your database administrator about additional fields available to you.

**MemberID\_**

The recipient's unique ListManager member ID. The tag %%memberid\_%% will be inserted into your content.

**NumBounces\_**

The number of times a recipient's mail has bounced. The tag %%numbounces\_%% will be inserted into your content.

**Date Fields**

This drop-down box allows you to insert a date field into your message. The fields available for mail merge are drawn from your ListManager members table. You may have ListManager display fields from other tables if you specify them in [Content: New Content. Advanced](#).

Described here are the default ListManager date fields available; consult with your database administrator about additional fields available to you. If the field is blank, the date 01/01/70 00:00:00 will be merged in.

**ConfirmDat\_**

The date the recipient confirmed list membership. The tag %%confirmdat\_%% will be inserted.

**DateBounce\_**

The most recent date the recipient last bounced. The tag %%datebounce\_%% will be inserted.

**DateHeld\_**

The date the recipient was changed to "held" status because of bouncing too much email. The tag %%dateheld\_%% will be inserted.

**DateJoined\_**

The date the recipient joined the list. The tag %%datejoined\_%% will be inserted.

**DateUnsub\_**

The date the recipient unsubscribed from the list. The tag %%dateunsub\_%% will be inserted.

**ExpireDate\_**

The date the recipient's list membership will expire. The tag %%expiredate\_%% will be inserted.

Using custom fields to personalize messages is a feature of ListManager Pro or Enterprise. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Pro or Enterprise.

## Content: Insert Field: Unsubscribe

---

An important part of any message you send is an easy way for people to unsubscribe from your list. Having easy to understand unsubscribe directions helps you to maintain a good relationship with your audience, and distinguishes your legitimate email from spam. The list unsubscribe header and footer are not included in your message, so you'll need to add unsubscribe instructions to every message.

### Unsubscribe Email Addresses

These tags merge in the email address recipients may use to unsubscribe from your list, or from all lists on your server.

Unsubscribe from this list

The merge tag `%%email.unsub%%` will be inserted into your content, and will be converted into a unique unsubscribe mail merge tag for each recipient. Example:

```
leave-141-4323P-@example.com
```

Only member 4323 will see this address. When email comes into ListManager with this address, it will unsubscribe that member, and record which mailing prompted the member to unsubscribe. The final "P" on the address is a "check character", ensuring that malicious people cannot unsubscribe others. For example, if someone changes the number to something else, say "4000", by mailing to "leave-141-4000P-@example.com", ListManager will see that this number has been tampered with, because "P" is not the correct "check character" for the number "4000". In this case, ListManager will interpret the message as if it were sent to "leave-jazztalk@example.com" and unsubscribe the sender of the message.

Unsubscribe from all lists

The email address to which a recipient should send mail in order to unsubscribe from all lists on your server. The merge tag `%%email.purge%%` will be inserted into your content, which will be translated into `purge@the-hostname-of-your-server.com`

### Text Unsubscribe Directions

Typically, these instructions are provided at the end of a message, but they can be inserted anywhere in your content. The Text Unsubscribe Directions will only appear when you are inserting into a text body.

Short: unsubscribe from this list

The following will be inserted into your message, and provides recipients with their unique unsubscribe email address:

```
To unsubscribe from this list, send a blank email to  
%%email.unsub%%
```

Long: unsubscribe from this list

The following will be inserted into your message, and provides recipients with their unique unsubscribe email address, along with additional subscription information:

```
You are subscribed to %%list.name%% as %%emailaddr%%.  
To unsubscribe, send a blank email to %%email.unsub%%
```

Short: unsubscribe from all lists

The following will be inserted into your message, and provides recipients with the purge email address:

```
To unsubscribe from all lists, send a blank email to  
%%email.purge%%
```

Long: unsubscribe from all lists

The following will be inserted into your message, and provides recipients with the purge address, along with additional information about the lists they are subscribed to on the entire server. Caution: this list might be long!



```
To unsubscribe from all lists, send a blank email to
%%email.purge%%
Your email address %%emailaddr%% is subscribed to:
%%whatlists%%.
```

## HTML Unsubscribe Directions

Typically, these instructions are provided at the end of a message, but they can be inserted anywhere in your content. The HTML Unsubscribe Directions will only appear when you are inserting into an HTML body.

Short: unsubscribe from this list

The following will be inserted into your message, and provides recipients with their unique unsubscribe email address:

```
<HR>
To unsubscribe from this list, send a blank email to <A
HREF="mailto:%%email.unsub%%"><B>%%email.unsub%%</B></A><BR>
```

Long: unsubscribe from this list

The following will be inserted into your message, and provides recipients with their unique unsubscribe email address, along with additional subscription information:

```
<HR>
You are subscribed to <I>%%list.name%%</I> as
<I>%%emailaddr%%</I>.<BR>
To unsubscribe, send a blank email to <A
HREF="mailto:%%email.unsub%%"><B>%%email.unsub%%</B></A><BR>
```

Short: unsubscribe from all lists

The following will be inserted into your message, and provides recipients with the purge email address:

```
<HR>
To unsubscribe from all lists, send a blank email to <A
HREF="mailto:%%email.purge%%"><B>%%email.purge%%</B></A><BR>
```

Long: unsubscribe from all lists

The following will be inserted into your message, and provides recipients with the purge address, along with additional information about their subscription.

```
<HR>
You are subscribed with the email address
<I>%%emailaddr%%</I>.<BR>
To unsubscribe from all lists, send a blank email to <A
HREF="mailto:%%email.purge%%"><B>%%email.purge%%</B></A><P>
```

## Content: Insert Field: Autoresponders

---

An autoresponder is an email address that always responds by sending a document to whomever sends an email to it.

For instance, set up a "prices@yourcompany.com" autoresponder that sends out price list to anyone who emails to it.

An autoresponder with information on how to unsubscribe or get in touch with someone at your organization is useful to have in the From: field of your content. Create an autoresponder by going to [Utilities: Autoresponders: New Autoresponder](#), and select it here to have the address inserted into your message.

## Content: Insert URL

### Content: New Content: Insert URL: Clickable Text

See [Content: Insert URL](#) for more information about clickthrough tracking URLs.

This tab is only available when inserting a URL into an HTML message.

#### Clickable Text

The visible text you'd like recipients to be able to click on. For example, instead of displaying the clickthrough tracking URL, you'd like the destination URL to be displayed. You'd enter that URL here.

Example:

```
http://acme.lyris.com/products/anvils.html
```

#### Destination URL

The URL you'd like recipients to be taken to when they click on the clickable text. For example, if you're advertising a product, and would like to track who actually goes to the page displaying that product, make the destination URL your Web site's URL for that product.

Example:

```
http://acme.lyris.com/products/anvils.html
```

#### Link to Mailing

You can also include a link recipients can click to see the HTML message in a web browser. The tag `%%url.mailing%%` will merge a unique link for each recipient, which, when clicked, will take the recipient to a fully merged version of the message. To insert this link, click the **Link to Mailing** button.

#### (optional) URL Report Description

Describe your trackable URL. This description is not seen by message recipients, so describe the URL in a way that will help you to identify it later in Reports.

Example:

```
anvil-ad
```

Note that once you give a particular URL a description, that description will be used as its URL Name in Reports from then on. Although you may give the same URL a different description when you insert it in the future, it will always be displayed in Reports with the original description. You cannot give the same URL different descriptions.

### **(optional) URL Report Group**

A name for a group of URLs. If you provide the same report group name for a number of different URLs, you can see the results of all of those URLs as part of a report group

Example:

```
anvils-top
```

## **Content: Insert URL**

---

There are four kinds of URLs you can insert:

1. Tracking URLs (clickable text or image, URL)
2. Unsubscribe, Profile, Survey, and Referral URLs
3. URL to web page to insert into message (web fetch)
4. Rich Media (audio or video)

You can see how successful your mailing has been by seeing how many recipients clicked on URLs in the message. To keep track of those clicks, you must first make a clickthrough tracking URL, and insert it in your content. You'll then be able to view the clicks in [Reports: Tracking Statistics](#).

You may also insert an unsubscribe URL that allows members to unsubscribe quickly and easily from your list.

Insert URL also allows you to insert a web page into your content. The web page may be fetched when creating the content, for each mailing or for each individual recipient.

For every clickthrough tracking URL, you may specify a **URL Report Description** (its Name in Reports) and **URL Report Group**. You may then later sort by these names when you view [Reports: Mailing Reports: View Clickthrough Tracking](#). Note: The URL Report Description given to a URL the first time it is used will be its Name in reports in the future, even if you give it a different name.

Although ListManager may record URLs up to 4000 characters in length, we recommend you limit URLs to 2000 characters. As of this writing, Microsoft Internet Explorer only supports URI 2,083 characters in length. See this article for more information: <http://support.microsoft.com/kb/208427/>

### **Tracking URLs**

It's simple to make clicks on text or images in your message trackable.

## All URLs

You can [choose to track all URLs while creating a mailing](#).

### Clickable Text

1. Select **Content: New Content: HTML**.
2. Click *insert url*.
3. Enter the text you'd like recipients to see in **Clickable Text**.
4. Enter the **Destination URL** you'd like recipients to be directed to when they click on your clickable text.
5. Optionally enter a **URL Name** and **URL Report Group** to help you identify this URL later on in [Reports: Mailing Reports: View Clickthrough Tracking](#).
6. Click **Insert**.

**NOTE** You can also include a link recipients can click to see the HTML message in a web browser. The tag `%%url.mailing%%` will merge a unique link for each recipient, which, when clicked, will take the recipient to a fully merged version of the message. To insert this link, click **Link to Mailing**.

### Clickable Image

1. Select **Content: New Content: HTML**.
2. Click *insert url*.
3. Select the **Imagetab**.
4. Enter the **URL to Clickable Image**. This URL must be the full path to an image on your web server. Example: `http://example.com/anvil.gif`
5. Enter the **Destination URL** you'd like recipients to be directed to when they click on your clickable image.
6. Optionally enter a **URL Name** and **URL Report Group** to help you identify this URL later on in [Reports: Mailing Reports: View Clickthrough Tracking](#).
7. Click **Insert**.

### Undisguised URL

Note: you cannot disguise tracking URLs in text messages.

1. Select the **HTML** or **Text** tab in **Content: New Content**.
2. Click *insert url*.
3. Select the **URL** tab (HTML only; by default, you'll be taken to this page for a text message).
4. Enter the **Destination URL** you'd like recipients to be directed
5. Optionally enter a **URL Name** and **URL Report Group** to help you identify this URL later on in [Reports: Mailing Reports: View Clickthrough Tracking](#).
6. Click **Insert**.

## All URLs

To make all URLs clickable in a message:

1. Select the **HTML** or **Text** tab in **Content: New Content**.
2. Enter your content, including any HTML links.
3. Click **Track All URLs**.
4. Click **Save**.

If you will be tracking a large number of URLs, or using other ListManager tracking features, you may need to ask your server administrator to set up [additional ListManager Web servers](#) to take the load.

## Unsubscribe

Members can leave your list easily if you insert an Unsubscribe URL in your mailing. Giving members an easy way to unsubscribe cuts down on your administrative time.

1. Select **Content: New Content: HTML** or **Text**.
2. Click *insert url*.
3. Select the **Unsubscribe** tab.
4. Specify whether you'd like a plain URL, linked text or a linked graphic (HTML only) for **Insert What**.
5. Specify **Email Notification**, or whether or not verification that the member has unsubscribed should be sent via email.
6. Specify **From All Lists**, or whether or not the member is unsubscribing from the current lists, or from all lists on your server.
7. Specify **Confirm**, or whether or not the member must confirm unsubscribing on a web page.
8. Optionally specify the **Destination URL** of a web page members are taken to after unsubscribing.
9. Click **Insert**.

## Profile

Members can edit their member profiles if you insert a profile form URL in your mailing. The member profile forms must first be created in [Utilities: Web Forms: Member Profile Forms](#), in order to appear in the drop-down menu on this page.

1. Select **Content: New Content: HTML** or **Text**.
2. Click *insert url*.
3. Select the **Profile** tab.
4. Select the desired HTML profile from the drop-down menu. In order to appear here, these must first be created in [Utilities: Web Forms: Member Profile Forms](#).
5. Enter the clickable text that the recipient will see in order to edit their member profile, for instance "Click here to edit your member profile".
6. Click **Insert**.

## Survey

Members can take surveys if you insert a survey form URL in your mailing. The survey forms must first be created in [Utilities: Web Forms: Surveys](#), in order to appear in the drop-down menu on this page.

1. Select **Content: New Content: HTML** or **Text**.
2. Click *insert url*.
3. Select the **Survey**tab.
4. Select the desired HTML survey from the drop-down menu. In order to appear here, these must first be created in [Utilities: Web Forms: Surveys: New Survey](#).
5. Enter the clickable text that the recipient will see in order to fill out the survey, for instance "Click here to edit take our survey".
6. Click **Insert**.

## Referral

Members can send referral forms if you insert a referral form URL in your mailing. The invitation content must be created in [Content: New Content: New Content from Template](#), and the referral forms themselves must first be created in [Utilities: Web Forms: Referral Forms](#), in order to appear in the drop-down menu on this page.

1. Select **Content: New Content: HTML** or **Text**.
2. Click *insert url*.
3. Select the **Referral**tab.
4. Enter the clickable text that the recipient will see in order to send a referral form, for instance "Click here to refer us to a friend".
5. Select the desired invitation content from the drop-down menu. In order to appear here, these must first be created in [Content: New Content: New Content from Template](#), where an invitation template is selected.
6. Select yes or no to **Track opens** and **Detect HTML capability** for the referral form.
7. Select the HTML referral form from the drop-down menu. In order to appear here, these must first be created in [Utilities: Web Forms: Referral Forms](#). This form will be used to list the names and email addresses of friends to whom they would like to recommend your list.
8. Enter the destination URL for the user to go to after filling out the referral form. If left blank, a default page will appear, thanking them for referring other members.
9. Click **Insert**.

## Web Page

You may insert the contents of a web page into your content. This is sometimes known as webfetch.

1. Select **Content: New Content: HTML** or **Text**.
2. Click *insert url*.
3. Select the **Web Page** tab.
4. Enter the **URL to Fetch**, which is the URL of the web page you'd like to fetch into your content.
5. For **Fetch Page**, specify whether you'd like to fetch the contents of the page right now (as you create your content), once per mailing (the content is the same for each member), or for each member (CAUTION: can be VERY slow, depending on your web server).
6. Click **Insert**.

## Media

You may have rich media—music or video—play from your message. Keep in mind that some ISPs will strip out rich media. Also, some recipients' computers may not be set up to display embedded media set to auto play properly.

1. Select **Content: New Content: HTML**.
2. Click *insert url*.
3. Select the **Rich Media** tab.
4. Enter the **URL to Media** that you'd like to insert into your message.
5. Enter the **Clickable Text** that users should click on to activate the media (if applicable).
6. Enter the **Media Type: Video** or **Audio**.
7. Enter the **Action Type: Link**, to have a link to the media, **Embed (Autoplay)** to have the media embedded in the message and play automatically when the message is opened, or **Embed (Click to Start)**, to embed the media in the message but require the recipient start it playing.
8. Select whether or not you want to **Track** when people view or listen to this media.
9. Click **Insert**.

## Content: Insert URL: Clickable Image

---

See [Content: Insert URL](#) for more information about clickthrough tracking URLs.

This tab is only available when inserting a URL into an HTML message.

### Destination URL

The URL you'd like recipients to be taken to when they click on the trackable image. For example, if you're advertising a product, and would like to track who actually goes to the page displaying that product, make the destination URL your Web site's URL for that product.

Example:

```
http://acme.lyris.com/products/anvils.html
```

### URL to Image

The URL of the image you'd like to be displayed in your message. This URL must be the full path to the image (e.g., /img/anvil.gif won't work).

Example:

```
http://acme.lyris.com/img/anvil.gif
```

### (optional) URL Report Description

Describe your trackable URL. This description is not seen by message recipients, so describe the URL in a way that will help you to identify it later in Reports.

Example:

```
anvil-ad
```

Note that once you give a particular URL a description, that description will be used as its URL Name in Reports from then on. Although you may give the same URL a different description when you insert it in the future, it will always be displayed in Reports with the original description. You cannot give the same URL different descriptions.

### **(optional) URL Report Group**

A name for a group of URLs. If you provide the same report group name for a number of different URLs, you can see the results of all of those URLs as part of a report group

Example:

```
anvils-top
```

## **Content: Insert URL: URL**

---

See [Content: Insert URL](#): for more information about clickthrough tracking URLs.

### **Destination URL**

The URL you'd like recipients to be taken to when they click on the tracking URL. For example, if you're advertising a product, and would like to track who actually goes to the page displaying that product, make the destination URL your Web site's URL for that product.

Example:

```
http://acme.example.com/products/anvils.html
```

### **Link to Mailing**

You can also include a link recipients can click to see the HTML message in a web browser. The tag `%%url.mailing%%` will merge a unique link for each recipient, which, when clicked, will take the recipient to a fully merged version of the message. To insert this link, click the **Link to Mailing** button.

### **(optional) URL Report Description**

Describe your trackable URL. This description is not seen by message recipients, so describe the URL in a way that will help you to identify it later in Reports.

Example:

```
anvil-ad
```

Note that once you give a particular URL a description, that description will be used as its URL Name in Reports from then on. Although you may give the same URL a different description when you insert it in the future, it will always be displayed in



Reports with the original description. You cannot give the same URL different descriptions.

### **(optional) URL Report Group**

A name for a group of URLs. If you provide the same report group name for a number of different URLs, you can see the results of all of those URLs as part of a report group

Example:

```
anvils-top
```

The URL will be formatted as follows:

```
%%track [subst {http://acme.example.com/products/anvils.html}] -  
name {anvil-ad} -group {anvils-top}%%
```

## **Content: Insert URL: Confirm**

---

Prospective members can confirm their list membership either by sending an email message to the confirmation email address or by clicking on a confirmation URL. Generally, this URL is only included in document content intended to be used for a confirmation message.

To merge in a confirmation URL without a specified destination page, you may use the tag `%%url.confirm%%`. Recipients who click on this link will be sent to a ListManager destination URL.

### **Insert What (HTML Body Only)**

Specify what kind of unsubscribe link you'd like to insert into your HTML body. This option is unavailable for the Text Body.

#### **Linked Text**

The link will be encoded so that members will click on the word "confirm" to confirm their membership.

#### **Linked Graphic**

The link will be encoded so that members will click on a confirmation graphic to confirm their membership.

#### **URL**

An unencoded confirmation URL will be inserted into your content. This is the only kind of confirmation URL that can be inserted into the text body.

### **Destination URL**

The URL members will be taken to after clicking on the confirmation URL. If no URL is specified, they will be taken to a generic page telling them they have joined.

The formatting for a confirm URL will look like this:

```
http://yourlmsserver.example.com/c?id=%memberidchar%&u=http://redirect.example.com
```

## Content: Insert URL: Unsubscribe

---

Members can leave your list easily if you insert an Unsubscribe URL in your mailing. Giving members an easy way to unsubscribe cuts down on your administrative time unsubscribing people who'd like to leave your list.

To merge in an unsubscribe URL without a specified destination page or other options, you may use the tag `%%url.unsub%%`. This tag merges in a unique unsubscribe URL that includes the member's ID and the ID of the mailing, so ListManager can record which mailing prompted the user to unsubscribe.

Recipients who click on this link will be sent to a ListManager destination URL after unsubscribing. This wizard creates a URL that can direct recipients to your destination URL.

### Insert What (HTML Body Only)

Specify what kind of unsubscribe link you'd like to insert into your HTML body:

#### Linked Text

The link will be encoded in HTML so that members will click on the word "unsubscribe" to leave the list.

#### Linked Graphic

The link will be encoded in HTML so that members will click on an unsubscribe graphic to leave the list.

#### URL

An unencoded unsubscribe URL will be inserted into your content. This is the only kind of unsubscribe URL that can be inserted into the text body.

This option is unavailable for the Text Body. If an unsubscribe URL is inserted into the text body, it will be an unencoded URL.

### Email Notification

If set to Yes (default), those who unsubscribe will receive an email notifying them whether or not they have unsubscribed successfully. If set to No, they will not receive this notification.

You may customize the "goodbye" message ListManager sends members who have unsubscribed by creating a goodbye document in [Utilities: Automated Messages: Document Content](#), and then selecting it in [Utilities: Automated Messages: Document Associations](#).

### From All Lists

If set to No (default), clicking on the unsubscribe URL will unsubscribe the member from just the current list. If set to Yes, clicking on the URL will unsubscribe the member from all lists on the server.

## Confirm

If set to Yes, those who click on the unsubscribe URL will receive an email message asking them to confirm that they would like to unsubscribe. Otherwise, they will be unsubscribed immediately without email confirmation. By default, members are not asked to confirm via email before leaving the list.

You may customize the unsubscribe confirmation message ListManager sends by creating an unsubscribe confirmation document in [Utilities: Automated Messages: Document Content](#), and then selecting it in [Utilities: Automated Messages: Document Associations](#).

## Show Confirming Web Page

If set to Yes, those who click on the unsubscribe URL will first be taken to a ListManager web page which will ask them if they are sure that they want to unsubscribe. If set to No, they will be unsubscribed immediately without confirmation.

## Destination URL

The URL members will be taken to after clicking on the unsubscribe URL. If no URL is specified, they will be taken to a generic ListManager page telling them they have unsubscribed.

## Append Unsubscribe Information to the Destination URL

This option will pass information about the unsubscribing member into the destination URL, potentially to be used by a script. The options are:

- e = Email address.
- id = Member id and character uniquely identifying this member.
- l = Lists, separated by spaces.
- c = Confirm unsubscribe via email. Options are (T)rue or (F)alse.
- n = Send email notification of the unsubscribe. Options are (T)rue or (F)alse.
- u = Destination URL after unsubscribing.
- w = Show page asking unsubscribers to confirm before completing unsubscribe
- a = Append unsubscribe information to destination URL. Options are (T)rue or (F)alse.

## Example:

```
http://yourserver.example.com/u?id=%memberidchar%&o=%outmail.  
messageid%&u=http://example.com&n=T&c=F&l=%2A
```

# Content: Insert URL: Profile

---

A member profile form can be inserted into your content via the Insert URL: Profile tab. In order for profile forms to appear in this drop-down menu, they must first be created in [Utilities: Web Forms: Member Profile Forms](#). You will be able to see all the forms created for your access level; list administrators can see List profile forms only, Site

administrators can see List and Site forms, and Server administrators can see List, Site, and Server forms.

### **HTML profile form**

Select the desired form from the drop-down menu. To learn how to create these profile forms, see [Utilities: Web Forms: Member Profile Forms](#).

### **Intro text**

The visible text you'd like users to be able to click on in order to access the member profile form. For example, the intro text could be "Click here to edit your member profile form".

## **Content: Insert URL: Survey**

---

A survey form can be inserted into your content via the Insert URL: Survey tab.

### **HTML survey form**

Displays the available survey forms for this list, site, and server, depending on your access rights. List administrators can see List surveys only, Site administrators can see List and Site surveys, and Server administrators can see List, Site, and Server surveys. Select the correct survey form to insert into the content from the drop-down menu. In order for survey forms to appear on this drop-down menu, they must first be created in [Utilities: Web Forms: Surveys](#).

### **Clickable text**

The visible text you'd like users to be able to click on in order to access the survey form. For example, the clickable text could be "Take our survey".

### **Track survey clicks?**

Specifies whether clicks on the survey link should be tracked. By default, this setting is set to no. To track how many recipients click on the survey link, select yes. The results will be identified in the clickthrough tracking results by the survey's name (assigned when the survey was created).

## **Content: Insert URL: Referral**

---

This page is used to insert a URL that allows list members to refer others to this list ([Referral Tracking](#)). Note: You should first create a web form in [Utilities: Web Forms: Referral Forms](#) and an invitation in [Content](#) before inserting a referral into a message.

### **Invitation content**

Choose the message that will be sent by ListManager when prospective members are invited to join from the drop-down menu. This message is a unit of content that you have created. We recommend you use the invitation template in Content to create your

own custom invitation for members. For details on how to create this, see [Content: New Content from Template](#).

### **Track opens**

If you'd like to track how many invitees open the invitation message they receive, select yes for Track Opens. Note that opens can only be tracked by recipients who open their emails in HTML.

### **Detect HTML capability**

If you'd like to track how many invitees are able to see HTML, select yes for Detect HTML Capability. Click *view current totals* to see how many members have been detected as having HTML capability. This helps you to see approximately how many of the invitees out of the current members will have HTML capability, and therefore you will have the ability to track their opens.

### **HTML referral form**

Choose the web form that members will use to list the names and email addresses of friends to whom they'd like to recommend your list from the drop-down menu. Before using this feature, this form must be created in [Utilities: Web Forms: Referral Forms: New Referral Form](#).

### **Destination URL**

The URL those who refer members are taken to after filling out the referral form. If no URL is specified, users are taken to a default page thanking them for referring members.

## **Content: Insert URL: Web Page**

---

Insert URL allows you to insert a web page into your content (also called web fetch). The web page may be fetched when creating the content, for each mailing or for each individual recipient.

**NOTE** Do not fetch a web page if you plan to use the ListManager HTML editor. The ListManager HTML editor will likely break HTML generated by another editor.

[Learn more about fetching data from a web server.](#)

### **URL to Fetch**

The URL to be fetched into your content. Make sure that the path for your images in the web page you are fetching is the absolute path (the complete URL), not the relative path. For example, your HTML editor might make the path for a image to be something like `/img/product.jpg`. These should be changed to the absolute path: `http://example.com/img/product.jpg`.

You can make the URL to Fetch unique for each member by inserting a mail merge tag. However, you must use square brackets around the merge tag (not the normal double percents).

Wrong:

```
http://example.com/cgi-bin/getdata.pl?id=%merge  
members_.emailaddr_%%
```

Right:

```
http://example.com/cgi-bin/getdata.pl?id=[merge  
members_.emailaddr_]
```

## Fetch Page

Specify when you'd like the web page to be fetched.

### Right Now

Fetch the specified URL, and insert it into your content now. Even if the contents of the fetched page change, your content will stay the same.

### Once Per Mailing

Fetch the page once at the time a mailing with this content is sent. If the page is the same for each member, this method is much faster, as ListManager needs to wait for the web page only once.

### Repeatedly for Each Recipient

Fetch the page for each recipient on the list. If you are specifying a unique URL for each member (see URL to Fetch above), ListManager will need to fetch the page for each message it sends out.

This method is much slower than fetching the page once per mailing, because ListManager's speeds are limited by your web server's speeds. If you notice that your mailing speeds are faster if you select Once Per Mailing, your speeds are being limited by your web server.

## Content: Insert URL: Media

---

This tab allows you to insert links to video or audio clips into the HTML portion of your message. You may set the media so it plays automatically when a recipient opens a message, or requires the recipient to click on a link.

Note that having a clip play when a message opens can be unreliable, depending on the settings of a recipient's computer. For the most reliable results, include the media as a linked URL rather than embedding it.

Note that some ISPs (such as AOL) will strip out video or audio.

### URL to Media

The URL to the media you'd like played in your message.

### Clickable Text (If Linked)

The text users should click on to play the media, if applicable.

### Media Type

The type of media being included: video or audio.

### **Action Type**

How this media should be activated:

#### **Link**

Recipients must click on a link to access the media.

#### **Embed (Autoplay)**

The message plays automatically when the recipient opens the message. Having media play automatically can be unreliable, depending on the settings of a recipient's computer.

#### **Embed (Click to Start)**

Recipients must click to start playing the media.

### **Track**

Track how many people play the media. Results will be visible in Reports: Mailings: Tracking Statistics. Note that ListManager will record a hit every time the message is opened or the media is played.

## **Content: Insert Condition**

### **Content: Insert Condition**

---

Conditional content allows you to insert blocks of text or graphics into your message depending on whether certain conditions are met by a particular recipient. Using conditional content, you can easily create unique, one-to-one emails tailored to the exact needs and interests of your recipients, without having to write (or send) more than one message.

All the commands work using a simple *if-then-else* logic: *if* a particular condition is true, *then* insert a particular block of text; *else* (that is, if the condition is not true), insert a different text block. Note that by text, we mean both plain text or HTML—you may include either.

Conditional content is a feature of ListManager Pro or Enterprise, and is unavailable for standard ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Pro or Enterprise.

#### **Note for those upgrading from ListManager 5.0**

If you are using the ListManager Mailings menu to create mailings for your list, ListManager will automatically set Enable Scripting to Admins Only if previously disabled, and change the Scripting Level to Full. For more information about these settings, see [Utilities: List Settings: For Programmers: Email Scripting](#).

## Fields Available for Conditions

The fields available for making comparisons are drawn from your ListManager members table. You may have ListManager use fields from other tables if you specify them in [Content: New Content. Advanced](#).

Described here are the default ListManager member fields available; consult with your database administrator about additional fields available to you.

### **Additional\_**

Additional information about the recipient which you've added.

### **Comment\_**

Comments about the recipient which you've added.

### **ConfirmDat\_**

The date the recipient confirmed list membership.

### **DateBounce\_**

The most recent date the recipient last bounced.

### **DateHeld\_**

The date the recipient was changed to "held" status because of bouncing too much email.

### **DateJoined\_**

The date the recipient joined the list.

### **DateUnsub\_**

The date the recipient unsubscribed from the list.

### **Domain\_**

The domain portion of the email address (e.g., lyris.com).

### **ExpireDate\_**

The date the recipient's list membership will expire.

### **EmailAddr\_**

A recipient's full Internet email address.

### **FullName\_**

The full name of this recipient.

### **List\_**

The name of the list this recipient is a member of.

### **MailFormat\_**

The type of mail the member has opted to received, whether 'M' (multipart-alternative, the default), 'T' (text) or 'H' (HTML). The tag %%mailformat\_%% will be inserted into your content.

### **MemberID\_**

The recipient's unique ListManager member ID.



**MemberType\_**

The membership type of this member, whether 'normal', 'confirm', 'private', 'expired', 'held', or 'unsub'.

**NumBounces\_**

The number of times a recipient's mail has bounced.

**Password\_**

The recipient's password. If the recipient has no password, the field will be blank.

**ReadsHtml\_**

Whether or not ListManager has detected if this recipient can read HTML. The default is "F" or "False." If you have set ListManager to detect HTML reading capability, and the recipient reads a message with HTML, the value is "T" for "True."

**SubType\_**

The type of content this recipient is set to receive, whether digest, index, nomail, or mail.

**UserID\_**

The user ID information defined by you, such as a key back to another database.

## More Information About Personalizing Messages in ListManager

Inserting a condition in your content is an easy way to personalize your message. If you'd like to learn more about message personalization and scripting, see [Message Personalization and Scripting](#).

## Content: Insert Condition: Simple

---

A simple condition inserts the text of your choosing if a recipient's field matches the value you specify.

**If This Field**

Select the field you'd like ListManager to examine in order to insert conditional text. See [Content: Insert Condition](#) for more information about the fields available to you.

**Is Equal to This Value**

The text, date or number that determines whether or not someone should receive the conditional text. Dates should be entered in one of the following formats:

YYYY-MM-DD HH-MM-SS

MM/DD/YY

YYYY-MM-DD

## Then Insert This Text

The text that should be inserted into the message if the recipient meets your condition. If the recipient does not, then no text will be included.

## Inserting a Simple Condition

---

This example shows how to send a special message to all AOL members.

1. While creating content, click *insert condition*. You'll be taken to the Insert Condition: Simple page by default.
2. Select **Domain\_** for **If This Field**.
3. Enter **aol.com** for **Is Equal to This Value**.
4. Create your special message for AOL members in the field next to **Then Insert This Text**.
5. Click on **Insert**. The conditional content will be inserted into your message:

```
%iffield domain_ aol.com "We value our AOL subscribers!"%
```

## Content: Insert Condition: True/False

---

Like a [Simple Condition](#), a True/False Condition allows you to specify the text sent to recipients if the condition is true, but it also allows you to specify the text sent if the condition is false.

It also allows you to define the relationship between what is in the field and what you specify: is it less than or greater than the value you define? Does it contain certain letters and numbers? The ability to specify the relationship makes a True/False Condition more powerful and complex than a Simple Condition.

For more information about conditions in general, see [Content: New Content: Inserting a Condition](#).

### If This Field

Select the field you'd like ListManager to examine in order to insert conditional text. See [Content: New Content: Inserting a Condition](#) for more information about the fields available to you.

## Is

Select the relationship between the value you specify, and what is in the recipient's membership record. The options available are:

- = equal to
- < less than
- > greater than
- <= less than or equal to
- >= greater than or equal to
- <> is not equal to
- contains** (contains the letters or numbers somewhere in the field)
- does not contain** (does not contain the letters or numbers somewhere in the field)
- ends with** (contains the letters or numbers at the end of the field)
- begins with** (contains the letters or numbers at the beginning of the field).

## This Value

The text, date or number that determines whether or not someone should receive the conditional text. Dates should be entered in one of the following formats:

YYYY-MM-DD HH-MM-SS  
MM/DD/YY  
YYYY-MM-DD

## Then Insert This Text

The text that should be inserted into the message if the recipient meets your condition. If the recipient does not, then no text will be included unless you specify one.

## (optional) If Not, Then Insert This Text

The text that should be inserted into the message if the recipient does NOT meet your condition.

## Inserting a True/False Condition

---

This example shows how to send a special message to all members who work for the government.

1. While creating content, click *insert condition*. You'll be taken to the Insert Condition: Simple page by default.
2. Click on the **True/False tab**.
3. Select **Domain\_** for **If This Field**.
4. Select **Ends With** for **Is**.

5. Enter **.gov** for **This Value**.
6. Create your special message for government workers in the field next to **Then Insert This Text**.
7. Optionally, you can create a message for everyone else who isn't a government worker.
8. Click on **Insert**. The conditional content will be inserted into your message:

```
%%ifboolean domain endswith .gov "Government workers are especially important to us!" "No matter who you work for, you're important to us!"%%
```

## Content: Insert Condition: A or B

---

Like a [True/False Condition](#), an A or B Condition allows you to specify the text that is sent to recipients if the condition is true or if it is false, and allows you to specify the relationship (equal to, greater than, etc.) between what is in the field and the value you specify.

It also allows you to add additional conditions, so if a recipient meets the requirements of *any* of your conditions, the text you specify is sent.

For example, let's say you've been using the `Comment_` field to contain information about recipients' interests in sports. You can use an A or B condition to include your conditional text to anyone whose interest is skating *or* hockey. If a recipient has expressed an interest in either sport, the text you specify will be sent.

If you'd like to send a message to those who have shown an interest in both skating *and* hockey, you'll want to use an [A and B Condition](#).

For more information about conditions in general, see [Inserting a Condition](#).

### If This Field

Select the field you'd like ListManager to examine in order to insert conditional text. See [Inserting a Condition](#) for more information about the fields available to you.

### Is

Select the relationship between the field and value you specify. The options available are:

- = equal to
- < less than
- > greater than
- <= less than or equal to
- >= greater than or equal to

<> is not equal to  
**contains** (contains the letters or numbers somewhere in the field)  
**does not contain** (does not contain the letters or numbers somewhere in the field)  
**ends with** (contains the letters or numbers at the end of the field)  
begins with (contains the letters or numbers at the beginning of the field)

### **This Value**

The text, date or number that determines whether or not someone should receive the conditional text. Dates should be entered in one of the following formats:

YYYY-MM-DD HH-MM-SS  
MM/DD/YY  
YYYY-MM-DD

### **OR Is**

Selects another relationship between the field and value you specify. The options available are the same as for "is" (above).

### **More**

If you'd like more values, select *More*. Each time you select *More*, another *OR Is* and *This Value* pair of fields will be added.

### **Fewer**

If you've added too many values using *more*, and would like to remove them, select *fewer*. Each time you select *fewer*, the last *OR Is* and *This Value* pair of fields will be removed.

### **Then Insert This Text**

The text that should be inserted into the message if the recipient meets your condition(s). If the recipient does not, then no text will be included unless you specify one.

### **(optional) If Not, Then Insert This Text**

The text that should be inserted into the message if the recipient does NOT meet your condition(s).

## **Inserting an A or B Condition**

---

This example shows how to send a special message to all members have shown an interest in skating or hockey, which has been recorded in the ListManager Comment\_ field.

1. While creating content, click *insert condition*. You'll be taken to the Insert Condition: Simple page by default.
2. Click on the **A or B tab**.

3. Select **Comment\_** next to **If This Field**.
4. Select **Contains** next to **Is**.
5. Enter **skating** next to **This Value**.
6. Select **Contains** next to **OR Is**.
7. Enter **hockey** next to **This Value**.
8. Create your special message for skating and hockey fans in the field next to **Then Insert This Text**.
9. Optionally, you can create a message for everyone else who isn't a skating or hockey fan. None is included in this example
10. Click on **Insert**. The conditional content will be inserted into your message:

```
%%ifboolean comment contains skating OR comment contains  
hockey "The Iceland rink will be closed for Zamboni repairs."%%
```

## Content: Insert Condition: A and B

---

Like a [True/False Condition](#), an A or B Condition allows you to specify the text that is sent to recipients if the condition is true or if it is false, and allows you to specify the relationship (equal to, greater than, etc.) between what is in the field and the value you specify.

It also allows you to add additional conditions, so if a recipient meets the requirements of *all* your conditions, the text you specify is sent.

For example, let's say you've been using the `Comment_` field to contain information about recipients' interests in movies, and the `Additional_` field to contain information about what country they live in. You can use an A and B condition to include your conditional text to anyone whose interest is comedies, and who lives in India.

For more information about conditions in general, see [Inserting a Condition](#).

### If This Field

Select the field you'd like ListManager to examine in order to insert conditional text. See [Inserting a Condition](#) for more information about the fields available to you.

## Is

Select the relationship between the field and value you specify. The options available are:

- = equal to
- < less than
- > greater than
- <= less than or equal to
- >= greater than or equal to
- <> is not equal to
- contains** (contains the letters or numbers somewhere in the field)
- does not contain** (does not contain the letters or numbers somewhere in the field)
- ends with** (contains the letters or numbers at the end of the field)
- begins with** (contains the letters or numbers at the beginning of the field)

## This Value

The text, date or number that determines whether or not someone should receive the conditional text. Dates should be entered in one of the following formats:

YYYY-MM-DD HH-MM-SS  
MM/DD/YY  
YYYY-MM-DD

## AND this field

Selects another field you'd like ListManager to examine before inserting conditional text.

## More

If you'd like more values, select *more*. Each time you select *more*, another set of And This Field, Is and This Value fields will be added.

## Fewer

If you've added too many values using *more*, and would like to remove them, select *fewer*. Each time you select *fewer*, the last set of And This Field, Is and This Value fields will be removed.

## Then Insert This Text

The text that should be inserted into the message if the recipient meets your condition(s). If the recipient does not, then no text will be included unless you specify one.

## (optional) Otherwise, Then Insert This Text

The text that should be inserted into the message if the recipient does NOT meet your condition(s).

## Inserting an A and B Condition

---

This example shows how to send a special message to all members have shown an interest in comedies, which has been recorded in the ListManager Comment\_ field, and who live in India, which has been recorded in the ListManager Additional\_ field.

1. While creating content, click *insert condition*. You'll be taken to the Insert Condition: Simple page by default.
2. Click on the **A and B tab**.
3. Select **Comment\_** for **If This Field**.
4. Select **Contains** for **Is**.
5. Enter **comedies** next to **This Value**.
6. Select **Additional\_** for **AND This Field**.
7. Select **= equal to** for **Is**.
8. Enter **India** for **This Value**.
8. Create your special message for Indian comedy fans in the field next to **Then Insert This Text**.
9. Optionally, you can create a message for everyone else who isn't an Indian comedy fan.
10. Click on **Insert**. The conditional content will be inserted into your message:

```
%ifboolean comment contains comedies AND additional = india  
"The movie \"Serious Fun\" will be released in Bombay April  
26th!" "The movie \"Serious Fun\" will be released near you  
soon!"%%
```

## Content: Insert Condition: Percentage

---

ListManager has the ability to send particular messages to a percentage of your list. This feature is useful if you would like several advertisements rotated in your list, or if you would like a particular advertisement sent to only part of your list. The percentage chosen to receive each message is random—those delivered to first will have the same chances of receiving a particular message as those delivered last.

The text block rotated may be plain text, HTML or blank.

For each text block, you select the percentage of recipients who should receive it. Note that the sum of all the percentages cannot exceed one hundred. In other words, if you have one text block displayed 60% of the time, and another 60% of the time, you will



receive an error message—you will not have 20% receiving both messages. If you'd like to do so, insert two percentage conditions, each with 60% text block, 40% blank text.

### **Display This Text**

The text you would like to be included in your message. The text may be plain text or HTML. If you would like a certain percentage to receive nothing at all, leave blank.

### **This Often**

The percentage of recipients who should receive this particular text.

### **More**

If you'd like more text blocks, select *More*. Each time you select *More*, another set of *Display This Text* and *This Often* will be displayed.

### **Fewer**

If you've added too many text blocks using *more*, and would like to remove them, select *fewer*. Each time you select *fewer*, the last set of *Display This Text* and *This Often* will be removed.

### **Unique Name**

Each percentage condition must have a unique name. ListManager provides one for you, and we recommend you use this name. If you prefer, you may specify your own unique name here.

### **Apply To**

Specify whether the percentages specified above in the form apply to a percentage of recipients who receive an individual mailing, or to a particular percentage of mailings that use this content. *Percentage of Recipients* will rotate the text within each mailing that uses this content. *Percentage of Mailings* will rotate the text between mailings.

For example, let's say you've selected two different text blocks to be sent 50% of the time. If you select *Percentage of Recipients*, half of your recipients will receive a particular text block each time you mail. If you select *Percentage of Mailings*, half of your mailings will use one text block or another, and all recipients of the mailing will see the same text.

*Percentage of Recipients* is most useful if you plan on using a particular piece of content only once, or would like the content rotated within each mailing.

*Percentage of Mailings* is most useful if you are creating a template, and would like everyone to receive the same content, which is rotated between mailings.

## Content: Tools

## Content: Tools

---

Tools gives you a variety of ways of manipulating your content:

- [Convert](#) Converts either text or HTML into AOL HTML.
- [Validate](#) that your URLs are working properly, you content does not have scripts in it or that it is correctly in AOL HTML.
- [Reformat](#) the content so that long lines are wrapped, all URLs become tracking URLs, or that all scripts are removed.

## Content: Tools: Convert

---

### Text and HTML to AOL

Converts either text or HTML into AOL HTML . If a large number of your members are using AOL, you may want to convert your text and HTML to AOL HTML. Later versions of AOL (6.0 and higher) can read standard HTML, but strips out the following elements:

- ActiveX
- Audio
- External Style Sheets
- Frames and IFrames
- Java
- Meta Refresh
- Scripts: JavaScript, VBScript, Perl, etc.
- Tooltips
- Video

For more information about AOL's HTML mail requirements, see

<http://webmaster.info.aol.com/htmlmail.html>

Converting Text and HTML to AOL will strip the HTML section of the message of any non-AOL-compliant html tags. If there is a text section but no HTML section, ListManager will first run the Text to HTML converter, and vice versa if there is HTML but no text.

## Content: Tools: Validate

---

### Test all URLs

Checks and sees that all URLs in your content can be reached. When you test URLs, you will get a report for each telling you its status:

**HTTP/1.1 200 OK**

This web page was found, and can be retrieved successfully.

**HTTP/1.1 302 Found**

This page redirects to another page. ListManager does not track to the redirect location, so it cannot confirm that the redirect was successful.

**HTTP/1.1 404 Not Found**

The URL does not exist, according to the destination web server.

**Failed!**

DNS failed looking up the hostname for this URL.

**AOL HTML Compatibility**

Checks that your content's HTML is compatible with AOL Version 5.0 and higher.

If a large number of your members are using AOL, you may want to check that your HTML is AOL compatible. Later versions of AOL (6.0 and higher) can read standard HTML, but strips out the following elements:

- ActiveX
- Audio
- External Style Sheets
- Frames and IFrames
- Java
- Meta Refresh
- Scripts: JavaScript, VBScript, Perl, etc.
- Tooltips
- Video

For more information about AOL's HTML mail requirements, see

<http://webmaster.info.aol.com/htmlmail.html>

**No JavaScript**

Checks whether JavaScript is in your content. AOL, Hotmail and other ISPs will automatically strip out JavaScript from messages, so your content may not appear the way you would like it to look if you leave JavaScript in.

**No Java**

Checks whether Java is in your content. AOL, Hotmail and other ISPs will automatically strip out Java from messages, so your content may not appear the way you would like it to look if you leave Java in.

**No Scripts**

Checks whether any scripting (e.g., Java, JavaScript, ActiveX) is in your content. AOL, Hotmail and other ISPs will automatically strip out scripting from messages, so your content may not appear the way you would like it to look if you leave scripting in

## Content: Tools: Reformat

---

### Wrap Long Text Lines

Inserts line breaks at 68 characters in your Text Body so that the width of the text message is standardized. Otherwise, recipients' email clients may insert line breaks where you didn't intend them to be, making your message unattractive. Reformatting a text message to wrap long lines ensures that the message formatting you see on your screen is what recipients of the message will see.

### Make HTML Section AOL-Compliant

Converts your content's HTML so it is compatible with AOL Version 5.0 and higher. If a large number of your members are using AOL, you may want to check that your HTML is AOL compatible. Later versions of AOL (6.0 and higher) can read standard HTML, but strips out the following elements:

- ActiveX
- Audio
- External Style Sheets
- Frames and IFrames
- Java
- Meta Refresh
- Scripts: JavaScript, VBScript, Perl, etc.
- Tooltips
- Video

For more information about AOL's HTML mail requirements, see

<http://webmaster.info.aol.com/htmlmail.html>

Note that converting the HTML to be AOL compliant changes the HTML for all recipients of this content. If you want only AOL members to receive content formatted for AOL, you will need to create a [segment](#), and then mail to that segment.

## Creating New Content from a Template

### Content: Create New Content: Essentials

---

The fields on the Essentials page are required for all content you create. Generally, any message you send will also have a text and/or html message as well. For a step-by-step guide to making content, see [Content: New Content](#).

#### Content Name

Select a name to identify your content. This name is not seen by message recipients, so label the content in a way that will help you to identify it later in the Content main page.

## Description

Describe your content. This description is not seen by message recipients, so describe the content in a way that will help you to identify it later in the Content main page.

## From:

The name and email address that should appear in the message's From: line. By default, your email address will appear in this field.

Examples of valid values for this field:

```
bob@example.com  
Bob Smith <bob@example.com>  
bob@example.com (Bob Smith)  
"Bob Smith" <bob@example.com>
```

To customize the message, select [Insert Field](#) to insert a mail merge field or an [autoresponder](#) address.

## To:

The name and email address that should appear in the message's To: line. By default, the mail merge tag %%nameemail%% appears in this field, which will merge in each recipient's name and email address. If you'd like to have a name and email address, put the name in quotation marks, and the email address in angle brackets. Example:

```
"Jazz List" <jazztalk@lists.example.com>
```

To customize the message, select [Insert Field](#) to insert a mail merge field.

The To: field does not actually select the message's recipients. When building your mailing, you'll specify the [segment](#) or lists you'd like to send the message to.

## Subject:

The text which will appear in the message's Subject: line. To customize the subject line for individual recipients, select [Insert Field](#) to insert a mail merge field.

[Learn about saving and testing content.](#)

# Content: Create New Content: Fill in Editable Regions


---

In the Fill In Editable Regions tab, you can change areas of a template to create a more customized message. The text and images that are editable are outlined in green.

There are two types of editable regions: Text Editable Regions and Image Editable Regions.

## Text Editable Regions

In a Text Editable Region (which may contain images), you can

- Edit the text
- Add an image by clicking the [Insert Image button](#) in the HTML Editor toolbar.  

- Move an image
- Resize an image
- Replace an image by selecting the image, and then clicking the Insert Image button in the HTML Editor toolbar.

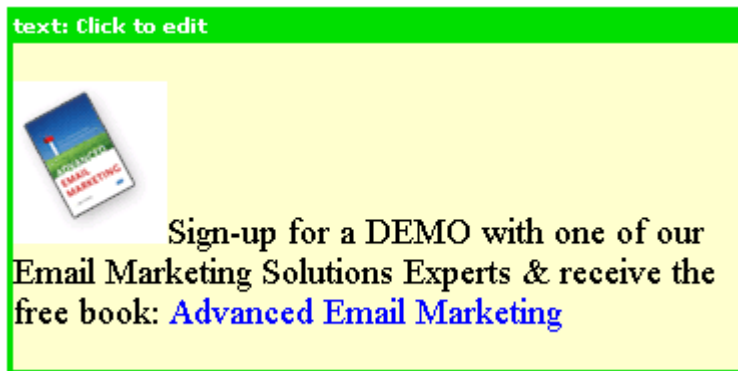
You cannot:

- Replace an embedded image with an image dragged from the Image Library

### To edit text or images in a Text Editable region

1. Click the editable region you want to change. This opens a limited version of the [HTML Editor](#).
2. To edit text, make changes as you normally would using features of the HTML Editor.
3. To move an image, click the image, and then drag it to the new location.
4. To resize an image, click the image twice, and then drag one of the resize handles located along its border.
5. When you are finished, click **OK**.

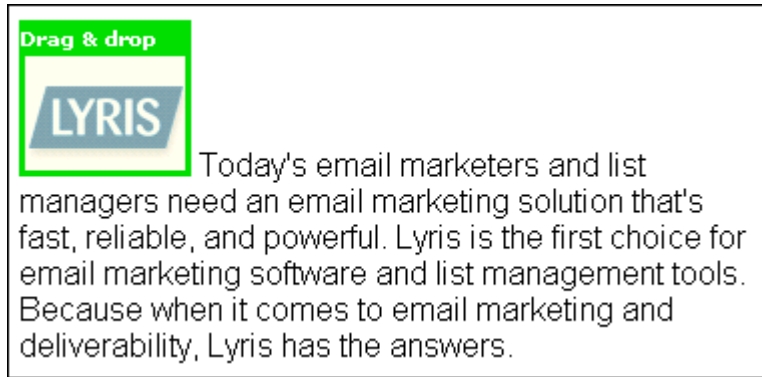
Here is an example of a Text Editable Region with an embedded image:



### Image Editable regions

In an Image Editable Region, you can

- Replace the image with a different one from the Image Library
- Resize the image



### **To replace an editable image (as pictured above) with an image from the Image Library**

1. Make sure the image you want to replace is outlined in green.
2. On the right side under **Image Library**, click the folder that contains the image you want. This displays the images in the folder.
3. Drag the image you want from the Image Library, and then drop it on the image you wish to replace.

### **To resize an editable image**

1. Click the image.
2. Drag one of the resize handles located along its border.

### **Notes**

- ◆ To create new folders, upload images, and perform other operations in the [Image Library](#), click the **Manage Library** button.
- ◆ **Internet Explorer only:** There may be times when you are working with an Editable Region and the text disappears. If this occurs, click anywhere in the white workspace area of the Editor; this should make the text reappear. [Learn about saving and testing content.](#)

## **Templates**

### **The Main Templates Page**

---

#### **Finding Templates**

Twenty content templates for the list are displayed in Templates. To view more than twenty templates at a time, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of templates at a time. Click **Next** to see the next twenty templates, **Previous** to see the last twenty.

You may change the sorting order of the templates by clicking the up or down triangles next to Name and Description. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a).

## Template Types

By default, the Templates Page displays templates you have created ("Your templates"). To view ListManager's built-in sample templates, click the **Your Templates** box and then select **Built-In Templates**. The built-in templates cannot be edited.

## Viewing or Editing Existing Templates

To view/edit a template, click the **Edit** command for the template.

## Testing Existing Templates

Click **Test** next to the content you'd like to test. ListManager will show you the header, text message and HTML message.

## Copying Templates

Click **Copy** next to the content you'd like to copy. ListManager will show you the old name and description, and will ask you the new name and description you'd like. It will also ask you which list to which you'd like to copy the content.

## Deleting Templates

Click **Delete** next to the content you'd like to remove. ListManager will ask you if you're sure before deleting the content.

## Creating New Templates

To create a new template, click create new template.

## Download as a File

Click on the disk icon to download your template in CSV format.

# Content: Templates: Copy Template

---

## To copy a template

1. On the [main Templates page](#), click the **Copy** command for the template.
2. To change the name, edit the text in the **New name** box.
3. To change the description, edit the text in the **New description** box.
4. To copy the template to a new list, select the list in the **Destination list(s)** box.
5. Click the **Copy** button.

# Content: New/Edit Template: Essentials

---

When you click the **Create New Template** button on the [main Templates page](#), the **Create New Template** page appears and displays the **Essentials** tab. This is where you provide basic information for your template.



## Template Name

Select a name to identify your template. This name is not seen by message recipients, so label the template in a way that will help you to identify it later on the main Template page.

## Description

Describe your template. This description is not seen by message recipients, so describe the template in a way that will help you to identify it later on the main Template page.

## From:

The name and email address that should appear in the message's From: line. By default, your email address will appear in this field.

Examples of valid values for this field:

```
bob@example.com
Bob Smith <bob@example.com>
bob@example.com (Bob Smith)
"Bob Smith" <bob@example.com>
```

To customize the template, select [Insert Field](#) to insert a mail merge field or an [autoresponder](#) address.

## To:

The name and email address that should appear in the message's To: line. By default, the mail merge tag `%%nameemail%%` appears in this field, which will merge in each recipient's name and email address. If you'd like to have a name and email address, put the name in quotation marks, and the email address in angle brackets. Example:

```
"Jazz List" <jazztalk@lists.example.com>
```

To customize the message, select [Insert Field](#) to insert a mail merge field.

The To: field does not actually select the message's recipients. When building your mailing, you'll specify the [segment](#) or lists you'd like to send the message to.

## Subject:

The text which will appear in the message's Subject: line. To customize the subject line for individual recipients, select [Insert Field](#) to insert a mail merge field.

[Learn about saving and testing your template.](#)

## Content: New/Edit Template: HTML Message

---

In the **HTML Message** tab, you can use the HTML Editor to create and edit the HTML that will be included in your email.

[Learn more about using the HTML Editor.](#)

## HTML Editor Browser Support

- Internet Explorer 6 Service Pack 2 and Internet Explorer 7
- Firefox 2

### Notes

- Not all email clients will show the background of your message, so it may be best to use a white background for your HTML message.
- Not all browsers can read HTML, so it's a good idea to include a [Text Message](#). A message that includes both text and HTML is called multipart-alternative format; it ensures that recipients who can read HTML see only HTML, but those who cannot see the plain text message.
- Additional message header and footer information can be added to the message if enabled in [Utilities: List Settings: Web Created Content: Insert Headers and Footers](#).
- You can include a link that recipients click to see the HTML message in a web browser. The tag `%%url.mailing%%` merges a unique link for each recipient which takes the recipient to a fully merged version of the message. Note that [archiving](#) must be enabled for the list.

**IMPORTANT NOTE** Javascript is not supported in the HTML Editor.

[Learn about saving and testing your template.](#)

## Content: New/Edit Template: Images

---

If you have already placed images in the HTML Message tab, you can replace and resize them in the Images tab.

### To expand a folder and view its contents

On the right side under **Image Library**, click the folder name. To collapse it, click it again.

### To replace an image the workspace area with one from the Image Library

1. On the right side under **Image Library**, click the folder that contains the image you want.
2. To preview an image, click the **view image** command beneath the image.
3. Drag the image you want to use and drop it over the image you wish to replace.

### To resize an image in the workspace area

1. Click the image. Resize handles appear along the image's borders.
2. Drag one of the resize handles.

**NOTE** To resize the image vertically (in other words, make it taller or shorter), drag the handle located on its bottom border up or down.

### To add, edit and delete images in the Image Library

Click the **Manage Library** button.

[Learn more about the Image Library](#)

### To refresh the Image Library

Click the **Refresh** button. This allows you to see any images that have been added from another computer.

### To hide the Image Library

Click the handle located along the right edge of the workspace area.



To show the Library, click the handle again.

[Ref298451547](#)

### If you can't replace an image ...

Images that can be replaced should always have a colored border around them. If an image doesn't have a border, it is embedded in text that you specified as editable in the Specify Editable Regions tab and cannot be replaced in the Images tab. To replace such an image, do the following:

1. Click the **HTML Message** tab.
2. Right-click the image, and then choose **Image Properties**.
3. Click **Browse Server**. This opens the [Image Browser](#), where you can select a new image.

[Learn about saving and testing your template.](#)

## Content: New/Edit Template: Specify Editable Regions

---

When you create a template, you may have sections that will never change (for example, a product description) and other areas that will change periodically (for example, news about special events). In the Specify Editable Regions tab, you can choose to make paragraphs of text or images editable. You would then edit these areas in the [Fill in Editable Regions](#) tab when you [make new content from a template](#).

**NOTE** The following tags are the only ones that contain content that can be made editable:

paragraph `<p>`  
image `<img>`  
div `<div>`  
headings 1 through 6 `<h1>`, `<h2>`, etc.

### To specify an editable region

1. Move the pointer over the content you want to make editable.

A red box appears around the region; its title bar contains the tag name and a message telling you to click to make it editable.

2. Click the content.

A green box appears around the content telling you it is now editable.

#### Notes

- If you embed an image in a paragraph, and then make the paragraph an editable region, you will not be able to replace the image in the **Images** tab. You can still replace the image in the **HTML Message** tab.
- While creating or editing a template, you cannot select an image map as an editable region.

[Learn about saving and testing your template.](#)

## Content: New/Edit Template: Text Message

---

For a step-by-step guide to making content, see [Creating Content -- Overview](#).

### Text Message

The plain-text contents of this message.

Text copied and pasted from word processing programs such as Word may include extra characters, so it should be pasted into a plain-text editor first before being copied into the Text Message box.

If your content also includes an [HTML message](#), your message will be sent out with both text and HTML. This kind of message is called multipart-alternative format, and it ensures that recipients who can read HTML see only HTML, but those who can't see the plain text message.

Additional message header and footer information may be added to the message if enabled in [Utilities: List Settings: Web Created Content: Insert Headers and Footers](#).

### Button Options

#### Show More

Click to increase by ten the number of lines visible in the message body.

#### Show Less

When visible, click to decrease by ten the number of lines visible in the message body.

#### Import File

Imports an HTML file into your HTML message body. File types not in HTML format cannot be imported.

Make sure your imported HTML uses complete paths, not relative paths, to images.  
Example:

Wrong:

```
/img/lyris.gif
```

Right:

```
http://www.lyris.com/img/lyris.gif
```

**NOTE** The Import File feature should not be used to attach documents to the message; use [New Attachment](#)

### HTML to Text

Converts an HTML message into text. Any formatting that was applied in the HTML Message tab is lost in the Text Message tab; however, special characters will appear before and after text to indicate that it was formatted. For example:

\*Text that had Bold formatting will have asterisks before and after it, like this.\*

\_Text that was in Italics will have underscores before and after it, like this.\_

**NOTE** If you already have a text body, converting the HTML to text will overwrite the preexisting text body.

### Understanding Template Fields

If you create editable regions in your template, and then choose **HTML to Text** in your text message, template fields will be created automatically. If you then create content from that template, the template fields will change when you fill in the editable regions. You can see how this works by following the steps below:

1. In the left Navigation bar, click **Content**, click **View Templates**, and then click **Create New Template**.
2. Type a **Template name**, **Description**, and **Subject**.
3. Click the **HTML Message** tab. In the HTML Editor, type "Special Deals for the Month of ".
4. Highlight the text, and click the **Format** box and choose **Heading 2**.
5. Click the **Specify Editable Regions** tab, and then click the text to make it an editable region.
6. Click the **Text Message** tab, and then click the **HTML to Text** button.

The text is surrounded by tags which indicate that it is an editable template field:

```
<!-- :field: name="h24" type="headline" -->Special Deals for the month of <!--  
/:field: type="headline" -->
```

7. Click the **Save** button.
8. In the left Navigation bar, click **View content**, and then click the **Create From Template** button.
9. Find the template you just saved, and then click its **Select** command.
10. Type a **Content name** and **Description**.

11. Click the **Fill in Editable Regions** tab.
12. Click the text to make it available in the mini-editor.
13. At the end of the sentence, type "February."
14. Click the **Preview** button.

In the Preview window, you can see that the word "February" was added to the **HTML Message**. Because the editable region contained a template field for text, "February" is also added to the **Text Message**.

### **Insert Field**

[Insert Field](#) gives you the option to insert:

- Mail merge fields (e.g., email address, first name)
- Database fields
- Email unsubscribe instructions
- Autoresponder addresses
- Template fields

### **Insert URL**

[Insert URL](#) gives you the option to insert:

- A single clickthrough tracking URL
- Trackable text
- A URL to confirm membership (used in a confirmation document)
- Unsubscribe URL
- Member profile URL
- Survey URL
- Referral form URL
- The URL to a web page to insert (web fetch)

To personalize the message, click on [Insert Field](#) to add a mail merge tag.

### **Insert Condition**

[Insert Condition](#) lets you insert conditional (dynamic) content; this lets you send recipients customized messages.

### **Tools**

The [tools](#) button lets you:

- [Convert](#) your content so that it is AOL-compliant.
- [Validate](#) URLs, and check for scripts, including those AOL-incompatible
- [Reformat](#) text to be word-wrapped, or to make the HTML section AOL-compliant

### **Preview**

[Shows you](#) what your content will look like.

[Learn about saving and testing your template.](#)

# Content: New/Edit Template: Advanced

---

For a step-by-step guide to making content, see [Creating Content -- Overview](#).

The Advanced Headers page allows you to join to other tables, add additional headers, specify the language for informational purposes, and view the date this content was created.

## Join Other Tables

By default, ListManager only has access to its own database tables. To access data in other tables in your database, list the table names here, separated by commas. The standard members table is already included, and need not be specified. The fields in the tables specified here will be available for mail merging and conditional content.

Example:

```
demographics.customers, demographics.phonenumbers
```

Note that in order for the data to be pulled in properly the content must be sent to a segment that specifies how ListManager should join to it. See [Joining to Another Table](#) for more information.

## Attachments

The file names of your attachments are listed here.

### To attach a file

Click the **Attach File** button. You will be taken to [Content: New Attachment](#), where you can add an attachment.

### To remove a document already attached to the content

Click the **Remove** command to its name.

### To view an attachment

Click its name.

## Additional Headers

The message header is the part of the message that describes whom the message is from, whom it is addressed to, how the message should be displayed, and so forth. ListManager creates the correct header for your message automatically.

The optional text you specify as Additional Headers will be appended to the end of the message header of mailings created with this content. A message header text has the form of Key: Value.

If you want to add text to the header that is not a standard email header, you should prefix your key name with X- so that it does not interfere with normal operation of electronic mail. For example:

*X-Legal: Contents Copyright 1997 Example Corp Ltd.*

Note: All [document association messages](#) will appear as coming "FROM: Lyris ListManager". This can be overwritten here by adding other headers.

Note: If headers or footers are defined at multiple levels, i.e. server, site, or list, *each* header/footer will be added; one will not overwrite the other.

### **Date Created**

The date this content was originally created. For informational purposes only.

[Learn about saving and testing your template.](#)

## **Content: New/Edit Template: Internationalization**

Creating content in an alternate character set requires that you have that character set installed on your system and that you have a means of editing or entering your message in that character set. Your web browser may be capable of converting Unicode to whatever character set you have selected for the content but you must be sure that there weren't any characters entered that don't exist in the specified character set. Otherwise they will show up incorrectly.

When this content is imported to a mailing, you will see the same additional charset/encoding related settings in the mailings page; it is imported as any other content would be imported. You can also create a mailing with international characters directly, without importing content. See [Mailings: New Mailing: Internationalization](#) for more information.

### **Character Set**

Before you enter any content into the web interface you must select the character set that you want to use for this content. If the character set you want to use does not exist in the drop-down listbox, your server administrator can add it in the [Utilities: Administration: Server: Internationalization and Localization: International Character Sets](#) page.

The character set for new content will default to the character set used by the web interface for the current language.

There are two ways to choose a character set:

1. Click the **Character Set** box and choose a set from the list.
2. Import HTML into your content that has a meta tag which sets the character set. That character set will be selected in the Internationalization tab and used for the content. Example:

```
<meta content="text/html; charset=iso-2022-jp" http-equiv="Content-Type" />
```

### **NOTE**



- If there is text in the **Text Message** tab when you choose a new character set, that text will be corrupted. Always choose your character set before entering a text message.

### **Text and HTML Sections Encoding**

The default setting for **Text section encoding** and **HTML section encoding** is **quoted-printable**. The encoding options can be left alone, in general. If you are pasting in text that you know is already encoded differently, you can choose that encoding and select **already-encoded** for that section.

After selecting the character set for your content, you can now enter in your text. When you select any other tab in the content editor, the web browser will be set to use the character set that you defined. This is required to avoid character set conversions that are done by the web browser. These generally result in the loss of characters that aren't in the browser's character set.

Note that if the character set of the content you are writing doesn't contain characters that your web interface requires, the web interface may display some wrong characters while you are in the content editor. For example, if your web interface is in French and you are composing a message in Japanese, some special accented characters in the web interface may show up incorrectly. When you leave the content editor, the web interface will return to normal. This is due to the fact that the web browser cannot display text in two different character sets at the same time. The exception is Unicode, which is currently not supported for content editing.

You can use international characters in the From, To, and Subject fields but it isn't recommended. Email clients might not display these fields correctly because the character set of those fields may not be available in the message overview. Also, they must be specially encoded and not all mail clients are able to decode encoded header lines.

The Name and Description should contain only standard ASCII characters since these fields are displayed in parts of the web interface that may not be displayed in the same character set.

If you are pasting in text or HTML that includes extended characters you should determine whether or not the text you are pasting is actually in that character set. If you are pasting from a plain text or plain html document, the character set may not be visible in the editor you are copying from. If you paste them into the content editor, they may not show up correctly after you save your message. That is because the character set that you pasted in was incompatible with the one defined for the content. You can work around this problem by entering the text before setting the character set in the Internationalization tab. Once your text is entered, you can change the character set and the content body fields will then be displayed with the correct characters.

[Learn about saving and testing your template.](#)

## **Using Your Older Templates in ListManager 10**

---

If you want to use templates created in ListManager 9.1 or earlier, you must export and convert them.

### To view pre-9.2 templates

Type the following URL into your browser:

**<server name>/content/view\_pre92templates.tml**

You will see a list of your templates and several commands for each one.

## Viewing, Editing, Deleting, or Exporting Your Templates

### To view a template

Click the **Test** command for the template.

### To edit a template

Click the **Edit** command for the template. This takes you to the Edit Template page, where you can make changes in the following tabs:

Essentials

HTML Message

Images (this tab does not work with pre-9.2 templates)

Specify Editable Regions (this tab does not work with pre-9.2 templates)

Text Message

Advanced

Internationalization

The new Templates must have an HTML Message. You can create an HTML Message while editing the template before you run the conversion program. If your template is text-only, the Conversion program will create an HTML Message.

**Note** The conversion program cannot correctly parse a template when surrounded by an HTML tag. Pre9.2 templates look something like this:

```
##line &quot;clickable &quot;##
```

If your template is in an `<a href= HTML tag take it out.`

If your code looks something like this:

```
<p><a href="%%track [subst {http://www.lyris.com}]%%">##line&quot;clickable  
&quot;##</a> </p>
```

Change it to:

```
<p><a href="%%track [subst {http://www.lyris.com}]%%"></a> </p>
```

Deleting the template will make the href non-editable but the rest of the page can be converted. You should be able to edit the template after you have migrated your template.

When you save the template, you will see the message: "Warning: Your template does not include any editable regions; the entire message will be editable." Ignore this message. It simply means that in this pre-9.2 version of your template there are no recognizable template fields. Once you run the conversion, ListManager will recognize the converted template fields.

### To delete a template

Click the **Delete** command for the template.

### To export a template

1. Click the **Export** command for the template.
2. Select **Save**.
3. Navigate to the folder you want, and then save your template.

### Converting Your Template to a current version

Go to [http://www.lyris.com/support/listmanager/convert\\_template.php](http://www.lyris.com/support/listmanager/convert_template.php).

Step 1: Go through the steps to export your pre-9.2 template.

Step 2: **Browse** to find your saved template export, and then click **Upload**.

Step 3: Review your template information, and then click **Convert Template**.

The template is converted to the new format and opens in ListManager on the Create New Template page.

Click each tab and review its contents to ensure that the template has converted correctly. You can edit your new template in any way you like. When you are satisfied, click Save.

**NOTE** The name of your template will be changed to include a –copy at the end. This is done because a template with the original name (the pre-9.2 version) already exists in the database.

The template is now saved in the new format.

**NOTE** You must follow these steps for each of your pre-9.2 templates.

## The HTML Editor

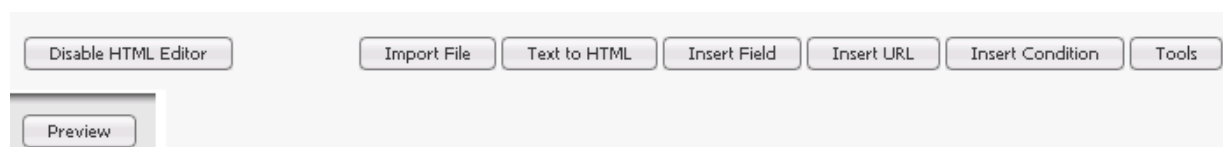
### Using the HTML Editor

---

In the HTML Editor, you can create and edit the content that will be included in your email. The Editor consists of three main areas:

1. The Toolbar and workspace.

2. [Button options](#):



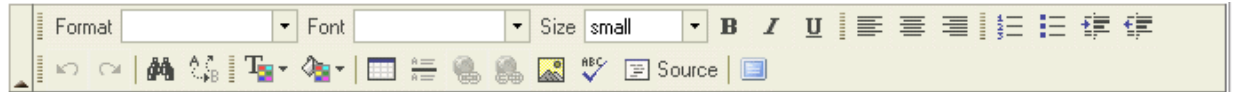
3. [Save and Test options.](#)

[Learn about useful tips and tricks in the HTML Editor.](#)

**NOTE** Javascript is not supported in the HTML Editor.

## The Toolbar and Workspace

To create your message, type text in the workspace, select it, and then edit it using Toolbar options. The toolbar contains features that are similar to those found in word-processing or web design programs. You can also do things like add images and create web links.



- |                                  |  |
|----------------------------------|--|
| <b>Format</b>                    | 1. Select the text.<br>2. Click the box next to <b>Format</b> , and then choose the HTML style you want. |
| <b>Font</b>                      | 1. Select the text.<br>2. Click the box next to <b>Font</b> , and then choose the font you want.         |
| <b>Size</b>                      | 1. Select the text.<br>2. Click the box next to <b>Size</b> , and then choose the size you want.         |
| <b>Bold / Italic / Underline</b> | 1. Select the text.<br>2. Click the button to apply the style you want:                                  |

 **B** Bold

 *I* Italic

 U Underline

- |                      |  |
|----------------------|--|
| <b>Justification</b> | 1. Select the text, image, or table.<br>2. Click the button to apply the justification you want: |
|----------------------|--|

 Left

 Center

 Right

- |                               |   |
|-------------------------------|---|
| <b>Create a Numbered List</b> | 1. Select the text.<br>2. Click the Numbered List button. |
|-------------------------------|---|



-or-

### To create the list as you type

- |  |  |
|--|--|
|  | 1. Click the Numbered List button. A "1" appears, indicating the first item in the list. |
|--|--|

### Create a Bulleted List

2. Continue typing. Each time you press **Enter**, a new line starts that is numbered automatically.

1. Select the text.
2. Click the Bulleted List button.



-or-

#### To create the list as you type

1. Click the Bulleted List button. A bullet appears, indicating the first item in the list.
2. Continue typing. Each time you press **Enter**, a new line starts that is bulleted automatically.

#### To change the indentation and bullet style

1. Select all lines in the list.
2. Click the Indentation button.



Each time you click, the list indents further and a new bullet style appears.

1. Select the text., image or table.
2. Click the Indent button.



### Indent / Decrease Indent

You can also click the Indent button first (one or more times), and then type or insert an item.

#### To decrease indented items

1. Select the items, or (for a single paragraph), click the pointer anywhere in the paragraph.
2. Click the Decrease Indent button one or more times.



### To undo or redo an action

Click the Undo or Redo button.



### To find text

1. Click the Find button.



2. In the Find what box, enter the text you want to find. You can choose the option to match case or match whole word.
3. Click **Find**.

### To replace text

1. Click the Replace button.



2. In the Find what box, enter the text you want to replace.

### To change the color of text

1. Select the text.
2. Click the Text Color button.



3. Choose the color you want.

### To change the background color for

1. Select the text.
2. Click the Background Color button.

text



3. Choose the color you want.
1. Click the Insert/Edit Table button.

To insert a table



2. Choose the properties you want.
3. Click **OK**.

To insert a horizontal line

Click the Horizontal Line button.



To create a link

1. Select the text to change to a link.
2. Click the Insert/Edit Link button.



3. Choose the properties you want.
4. Click **OK**.

**NOTE** If the Link button is not active, click anywhere in the white workspace area of the Editor. This should make it active.

To remove a link

1. Click the pointer anywhere inside the link.
2. Click the Remove Link button.



To insert an image

1. Click the Insert/Edit Image button.



2. Click **Browse Server**. This opens the Image Browser.
3. Do one of the following:
  - Click the image you want.
  - or-
  - On the left side of the window, click a folder to open it, and then click the image you want.
4. In the Image Properties dialog, choose the properties you want.
5. Click **OK**.

Learn more about [image properties](#) or the [Image Browser](#).

#### NOTES

- Make sure the path for your images is the absolute path (the complete URL), not the relative path.  
**Wrong:** /img/product.jpg  
**Right:** http://example.com/img/product.jpg

- The file formats supported by the Image Library are GIF, JPG, and PNG.

To edit an image

Click the image, and then click the Insert/Edit Image button.



You can also right-click the image and then choose **Image Properties**.

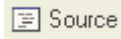
**To spellcheck your email**

Click the Check Spelling button. Your options will be similar to those available in a word-processing spellcheck feature.



**To toggle between Source Code view and HTML view**

Click the Source button.



**To maximize the editor size**

Click the Maximize button. To return to the normal view, click the button again.

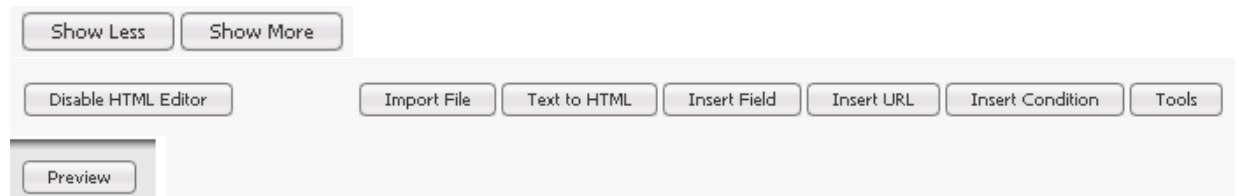


**To show or hide the toolbar**

Click the arrow on the left side of the toolbar.



## Button Options



**Show Less** (only available when you choose "Disable HTML Editor")

When visible, click to decrease by ten the number of lines visible in the message body.

**Show More** (only available when you choose "Disable HTML Editor")

Click to increase by ten the number of lines visible in the message body.

**Disable HTML Editor**

When visible, disables the WYSIWYG mode of the Editor and lets you work directly with the HTML code.

**Note** We recommend that you use the **Source** button on the Toolbar for this purpose except if you are using tcl commands.

**Enable HTML Editor**

When visible, re-enables the WYSIWYG mode of the Editor.

**Import File**

Imports an HTML file into your HTML message body.

**NOTE** The Import File feature should not be used to attach documents to the message; use [New Attachment](#) instead.

**Text to HTML**

Converts a text message into HTML. Note that if you already have an HTML body, converting the text to HTML will overwrite the preexisting HTML body.

### **Insert Field**

[Insert Field](#) gives you the option to insert:

- Mail merge fields (e.g., email address, first name)
- Database fields
- Email unsubscribe instructions
- Autoresponder addresses

### **Insert URL**

[Insert URL](#) gives you the option to insert:

- A single clickthrough tracking URL
- Trackable text
- Trackable image
- A URL to confirm membership (used in a confirmation document)
- Unsubscribe URL
- Member profile URL
- Survey URL
- Referral form URL
- The URL to a web page to insert (web fetch)
- URL to media to play (e.g., a sound or a video clip) in the message

To personalize the message, click on [Insert Field](#) to add a mail merge tag.

### **Insert Condition**

[Insert Condition](#) lets you insert conditional (dynamic) content; this lets you send recipients customized messages.

### **Tools**

The [tools](#) button lets you:

- [Convert](#) your content so that it is AOL-compliant.
- [Validate](#) URLs, and check for scripts, including those AOL-incompatible
- [Reformat](#) text to be word-wrapped, or to make the HTML section AOL-compliant

### **Preview**

[Shows you](#) what your content will look like.

**NOTE** The HTML Editor may, at times, change code "behind the scenes," but this does not affect the way the HTML will be displayed in a recipient's email program.

## **HTML Editor: Tips and Tricks**

---

### **The ENTER Key**

The ENTER key has different behavior in Internet Explorer and Firefox.



## Internet Explorer

### To insert a <br> tag

Press SHIFT+ENTER.

### To insert a <p> tag

Press ENTER once.

## Mozilla Firefox

### To insert a <br> tag

Press ENTER once.

### To insert a <p> tag

1. Press ENTER once to insert a <br> tag.
2. Click the **Source** button, and then change the <br> tag to a <p> tag.

**NOTE** This changes the function of the ENTER key; it will now insert <p> tags. To insert a <br> tag again, press SHIFT+ENTER.

## Absolute vs. Relative Paths

Make sure your imported HTML uses absolute paths, not relative paths, to images.

Example:

Wrong:

```
/img/lyris.gif
```

Right:

```
http://www.lyris.com/img/lyris.gif
```

## Image File Formats

The supported file formats are GIF, JPG and PNG.

## Trouble Displaying Images

You may have trouble displaying images in the HTML Message tab if you meet the following conditions:

- You are using Firefox.
- You have paths to images that are not fully defined.
- There is a DOCTYPE header in your HTML.

If this occurs, you can still go to the Images tab and drag images into your template or content. When you return to the HTML Message tab, the images display correctly.

## Displaying Styles

It is common to surround style declarations with comment syntax in order to avoid confusing older browsers that don't support Cascading Style Sheets:

```
<style type="text/css">
<!--
h1 {color: #36C;}
-->
</style>
```

If your content contains such code, the HTML Editor will not correctly display styles. If you want to have correct display of styles while you are in the HTML Editor, remove the comment tags before starting your work in the Editor, finish your work, and then reinsert the tags before saving.

### **Caution About Using PNG Images**

Images in the PNG file format that have transparency do not display properly in Internet Explorer 6.x or older. This is also a problem for IE-based email clients like Outlook. In light of these issues, we recommend not using PNG images with transparency.

### **Link Button is Inactive**

There may be times when you are in the HTML Editor and the Link button is inactive for no apparent reason. If this occurs, click anywhere in the white workspace area of the Editor; this should make it active.

### **Text Disappears**

There may be times when you are working with an Editable Region and the text disappears. If this occurs, click anywhere in the white workspace area of the Editor; this should make the text reappear.

### **Image Maps**


While creating or editing a template, you cannot select an image map as an editable region.

### **Copying and Pasting from a Different HTML Editing Program**

If you copy text from a different HTML editing program and then paste it into ListManager's HTML editor, you must be in the same mode in both editors. In other words, if you copy HTML code, you must paste it into the Source view in the HTML editor. If you copy while in WYSIWYG mode in the other editor, you must paste it into the WYSIWYG mode in the HTML editor.

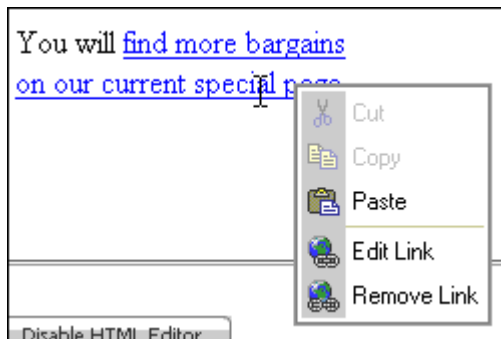
### **Problems with Creating Links while in Firefox**

If you are using the Firefox browser, you may run into the following: you create a link, and then when you continue typing what you hope will be normal text, the new text becomes part of and extends the link. To avoid this, do the following:

1. Add a link using either the Insert Link button in the HTML Editor toolbar  or the **Insert URL** button
2. After you finish typing the line, insert the pointer where you want the link to end.

You will [find more bargains](#) on our current specials page.

3. Press Enter. The latter portion of the sentence moves to the next line but still displays as linked.
4. Right-click the text on the new line, and then select Remove Link.



5. Move the now-unlinked text back up to its original line.

## HTML Editor: Image Properties

---

When you add or edit an image, you can choose a variety of settings related to that image in the Image Properties dialog box. This dialog appears:

1. When you click the Insert/Edit button; or
2. When you right-click an image and then choose **Image Properties**.

### The Image Info Tab

#### To specify an image to add to your message

In the **URL** box, type or paste a URL that points to the image you want.

-or-

To use an image already saved in the [Image Browser](#), click **Browse Server**.


#### To add alternative text to the image

This text appears if there is an error and the image cannot load. It is also helpful to users with text-only browsers.

- In the **Alternative Text** box, type the description you want.

#### To change the width or height of the image

1. Lock or unlock the sizes.

**Locked**  : When you change one size, the other changes in the same proportion.

**Unlocked**  : Each size can be changed independently.

2. Change the settings in the **Width** and **Height** boxes.

You can reset the size to the original settings by clicking the **Reset Size** button: 

#### To add a black border to the image

- Type a number in the **Border** box. The higher the number, the thicker the border.

#### To add space on both the right and left sides of the image

- Type a number in the **HSpace** box.

#### To add space on both the top and bottom of the image

- Type a number in the **VSpace** box.

#### To align the image with surrounding text

- Click the **Align** box, and then choose one of the following:

**Left:** Aligns image on the left side of the page.

**Abs Bottom:** Aligns the bottom of the image with the bottom of the text surrounding it, including any dangling portions as in the letters "j" and "y" \*\*

**Abs Middle:** Aligns the middle of the image with the middle of the text surrounding it. \*\*

**Baseline:** Aligns the bottom of the image with the bottom of the text. \*\*

**Bottom:** In most browsers, this operates the same way as **Baseline**. \*\*

**Middle:** Aligns the middle or bottom of text (depending on the browser) with the middle of the image.

**Right:** Aligns the image on the right side of the page.

**Text Top:** Aligns the top of the actual tallest text, or the tallest possible text (depending on the browser), with the top of the image. \*\*

**Top:** Aligns the top of the image with the top of text. \*\*

\*\* For these items, text does not wrap.

#### The Link Tab

##### To make the image a hotlink to another web address

- In the URL box, type the URL for the web page to go to when the image is clicked

-or-

- Click **Browse Server**, and then navigate to the destination page you want.

##### To control where the new document displays when the user clicks the image

- Click the **Target** box, and then choose one of the following:

**New Window (\_blank):** Loads the new document into a new window.

**Topmost Window (\_top):** Loads the new document into the entire window.

**Same Window (\_self):** Loads the new document into the same window or frame.

**Parent Window (\_parent):** Loads the new document into the parent frame of the frame containing the image.

## The Advanced Tab

### Id

You can apply styles to all elements with a given ID.

### Language Direction

Indicates the direction of your chosen language: choose **Left to Right (LTR)** or **Right to Left (RTL)**.

### Language code

Specifies the language of element content and attribute values.

### Long Description URL

If the image is too complex to describe with simple alt text, you can enter a URL which links to page with a longer description. You must create a the page with the description.

### Stylesheet Classes

You can apply styles or style classes to an image. However, there is no way to attach an external style sheet to your message; you must enter the style rules in the Source Code view. Here's an example:

1. Click the **Source** button in the toolbar to enter Source Code view.
2. After the `</title>` tag and before the `</head>` tag, add the following to create a style class:

```
<style type="text/css">
.make_border {
border-top-style: double;
border-right-style: double;
border-bottom-style: double;
border-left-style: double;
border-top-color: #316D9D;
border-right-color: #316D9D;
border-bottom-color: #316D9D;
border-left-color: #316D9D;
}
</style>
```

3. Click the **Source** button to return to the WYSIWYG view.
4. Click the Insert Image button and then add an image. For this example, you can type the following in the **URL** box of the **Image Properties** dialog:

<http://www.lyris.com/images/logo.gif>

5. Right-click the image, choose **Image Properties**, and then click the **Advanced** tag.
6. In the **Stylesheet Classes** box, type `make_border`.
7. Click **OK**.

The border may not appear immediately. If it doesn't, click the **Source** button twice.

### Advisory Title

This attribute can be useful in several ways: improving accessibility for the visually impaired, search engine optimization, or creating tooltips.

### Style

You can apply one or more style rules to the image. To do so, enter a rule without curly brackets or a selector. To separate two or more rules, type a semicolon between each rule. Example:

```
Style  
LEFT: 200px; POSITION: absolute; TOP: 50px
```

**Note** Make sure the path for your images is the absolute path (the complete URL), not the relative path.

**Wrong:** /img/product.jpg

**Right:** http://example.com/img/product.jpg

## HTML Editor: the Image Browser

---

In the Image Browser, you can create, edit, and delete folders, or upload a new image.

### To open the Image Browser

1. Click the Insert/Edit Image button.



2. Click **Browse Server**.

### To add an image to your message

1. If the image is in a different folder than the one that appears, on the left side of the Image Browser, navigate to the folder you want.
2. Click the image you want.
3. In the **Image Properties** dialog, click **OK**.

### To upload a new image

1. In the Image Browser, click **Browse Server**.
2. If desired, type a title in the **Title** box.
3. Click **Browse**, and then navigate to the image you want.
4. Click **Upload**.

### To create a new folder

1. Click the **Create New Folder** button.
2. In the **Folder Name** box, type a name.
3. Click **Save**.

### To change a folder name

1. Click the name of the folder you want to change.
2. Click the **Edit Folder** button.
3. In the **Folder Name** box, edit the name.

### To delete a folder

1. Click the name of the folder you want to delete.
2. Click the **Delete Folder** button.
3. Click the **Delete** button.

**NOTE** Images in the PNG file format that have transparency do not display properly in Internet Explorer 6.x or older. This is also a problem for IE-based email clients like Outlook. In light of these issues, we recommend not using PNG images with transparency.

## HTML Editor: Table Properties

---

In the Table Properties dialog, you can choose a variety of settings related to the table you select

### To change the number of rows

Select the number in the Rows box, and then enter the number you want.

### To change the number of columns

Select the number in the Columns box, and then enter the number you want.

### Width and Height

#### To change the width or height

Select the numbers in the **Width** or **Height** box, and then enter the number(s) you want.

#### To make the table a fixed size

Click the box next to the **Width** box and choose **pixels**. The table will remain the same size regardless of how the user resizes the window.

#### To make the table size flexible

Click the box next to the **Width** box and choose **percent**. The table size will change if the user resizes the window. For example, a width of 50 percent means the table will always be half the width of the browser window.

### Border

A border outlines your table and the cells in it.

#### To change the size of the border

Select the number in the **Border size** box, and then enter the number you want.

Border = 1:


Border = 5:


**To choose no border**

Enter 0 in the **Border size** box.

## Alignment

**To align the table on the page**

Click the **Alignment** box, and then choose **Left**, **Center** or **Right**.

## Cell Spacing and Cell Padding

Cell spacing is the number of pixels that appear between one cell border and the next.

Cell Spacing = 1:


Cell Spacing = 5:


Cell padding is the number of pixels between a cell's contents and its borders.

Cell Padding = 1:



Cell Number One	Cell Number Two
Cell Number Three	Cell Number Four
Cell Number Five	Cell Number Six

Cell Padding = 20:

Cell Number One	Cell Number Two
Cell Number Three	Cell Number Four
Cell Number Five	Cell Number Six

## Adding Fonts to the HTML Editor

---

You can add fonts to the HTML Editor by modifying the fckconfig.js file. The file is located here:

\\ListManager\tclweb\htdocs\libtml\FCKeditor\fckconfig.js

Before you modify this file, make a copy of it and name the original **fckeditor.js.old**.

### To add fonts

1. Open the fckconfig.js file in your preferred text editor.
2. Find **FCKConfig.FontNames**. It will look something like this:

```
FCKConfig.FontNames = 'Arial, Helvetica, sans-serif;Arial Black, Impact, fantasy, sans-serif;Comic Sans MS, Comic Sans, cursive, sans-serif;Courier New, Courier, mono;Geneva, Arial, Helvetica, sans-serif;Georgia, Times New Roman, Times, serif;Impact, Arial Black, fantasy, sans-serif;Times New Roman, Times, serif;Trebuchet MS, Arial, Helvetica, sans-serif;Verdana, Arial, Helvetica, sans-serif' ;
```

3. Insert the pointer before the quote (') that follows the last font listed. Type a comma, then a space, and then the font name(s) you want to add. It should look like this:

```
... Arial, Helvetica, sans-serif, font1, font2, font3' ;
```

Each font must be separated by a comma and a space, and all font names must be listed between one set of single quotes.

**NOTE** If you upgrade to a new version of ListManager, the fckconfig.js file is overwritten. You must repeat this procedure to continue using your added fonts.

## Image Library

### Content: Image Library

---

In the Image Library, you can create, edit, and delete folders, or upload a new image path.

**NOTE** The file formats supported by the Image Library are GIF, JPG, and PNG.

#### To create a new folder

1. Click the **Create New Folder** button.
2. In the **Folder Name** box, type a name.
3. Click **Save**.

#### To work with a different folder

On the left side of the Library under **Folder**, click the folder name.

#### To change the current folder name

1. Click the **Rename Folder** button.
3. In the **Folder Name** box, edit the name.

#### To delete the current folder

1. Click the **Delete Folder** button.
2. Click the **Delete** button.

#### To upload a new image path

1. Click **Include Remote Image**.
2. If desired, type a name in the **Image Name** box.
3. In the **Image URL** box, type the path to the image.
4. Click **Include**.

### To edit an image

1. Click the **Edit** button located beneath the image.
2. To change the folder the image is saved in, click the **Folder** box, and then choose a folder.
3. To change the image name, edit the name in the **Image Name** box.
4. To view a larger version of the thumbnail, click the thumbnail image.
5. When you are finished, click **Save**.

### To delete an image

1. Click the **Delete** button located beneath the image.
2. On the **Content: Delete Image** page, click the **Delete** button.

## Content: Image Library: Create New Image Folder

### To create a new image folder

1. In the **Folder Name** box, type the name you want.
2. Click **Save**.

## Content: Image Library: Rename Image Folder

### To rename a folder

1. Edit the folder name listed in the **Folder Name** box.
2. Click **Save**.

## Content: Edit Image

### To change the folder the image is saved in

Click the **Folder** box, and then choose a folder.

### To change the image name

Edit the name in the **Image Name** box.

### To preview the image

Click the image.

### To Delete the image

1. Click the Delete button.
2. When the question **Are you sure you want to delete this image?** appears, click **Delete** again.

When you are finished, click **Save**.

## **Content: Image Library: Include Remote Image**

### **To upload a new image**

1. If desired, type a title for the image in the **Image Name** box.
2. In the **Image URL** box, type the full path to the image.
3. Click **Include**.

# Segments

## Segments

---

### What is a Segment?

Segments are portions, or fragments of lists, whose members are based on some characteristic or criteria that each member must meet in order for that member to be included in the segment. Let's say you'd like to send a special message to only those list members who

- joined your list a week ago
- live in Canada
- are celebrating their birthday today
- have made a major purchase in the last year
- have an email address at a particular domain (e.g., aol.com or hotmail.com)

ListManager allows you to send to a segment, or *subset*, of your list who meet the criteria you define. Instead of sending to your entire list, you can use segments to filter exactly who should get a message based on whatever criteria you choose. These criteria are created by inserting one or more clauses into your segment. To see more information on inserting various types of clauses, see [text](#), [numeric](#), [date](#), [action](#), [clickthrough](#), [clickstream](#), [purchaseinterest](#), and [survey](#).

The segment is a statement about each member that *must* be true in order for that member to be included in that segment. Create a segment by inserting one or more clauses

For example, let's say you'd like to send a message only to those people on your list who work at "Company X", but you don't want to create a separate list for those people. By using the [Segments: New Segment: Essentials](#) page, you can create a segment which pulls all the members of the list with "example.com" in their email address. Click **Create New Segment**, and give your segment a name and a description. Then, specify you want to send to those email addresses with example.com in the domain by adding the following field:

```
Domain_ = example.com
```

To send to a segment, you may use the Mailings: New page to select the lists or subsets you'd like to send to, or you may send an email message to the segment address:

```
listname.segment@yourserver.example.com
```

**For technical users:** A segment is a subset, and is a user-defined SQL 'where' clause. It will be combined with the standard member retrieval 'where' clause in order to send to just a subset of the mailing list. More information about how to use your own SQL queries in ListManager may be found [here](#). However, you don't need to understand SQL in order to use segments in ListManager.

Although you can create and use segments to [find members](#) using standard ListManager, sending to segments is a feature of ListManager Pro or Enterprise, and is unavailable for standard ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Pro or Enterprise.

## Emailing to a Segment

Generally, users use the ListManager web interface to send to a segment. However, you may send an email message to a segment as well. The address is:

```
listname.segmentname@servername.example.com
```

## Triggered Segments

Triggered segments contain trigger clauses, which specify a given date or event, that when it occurs, will cause a mailing to be automatically sent. The trigger clause(s) specify exactly when the mailing will be sent to the segment. For more information on triggered segments, see [Segments: New Triggered Segment](#).

# Segment: View/Edit Segments

---

## Finding a Segment

Twenty segments are shown at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of segments at a time.

You may change the sorting order of the segments by clicking the up or down triangles next to Name and Description. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty segments, **Previous** to see the last twenty. You may select to view All, Standard, or Triggered segments by choosing the desired one from the drop-down menu. It will default to "All".

To search this table, click . To export this table as a CSV file, click .

## Viewing or Editing an Existing Segment

To view a segment, click on the segment's name. You will be taken to the [Segments: Edit Segment](#) page, where you can view the segment, edit it, or save and test it.

## Testing an Existing Segment

Click on **Test** next to the segment you'd like to test. ListManager will show you the query used in the segment, and a sample of the results so you can see if the segment is selecting the members you want it to select. It is **strongly** recommended that segments are tested when saved, to make sure that no errors occur.

## Copying a Segment

Click on **Copy** next to the segment you'd like to copy. ListManager will ask you the new name of the segment, its new description, and the lists it should be used for.

## Deleting a Segment

Click on **Delete** next to the segment you'd like to delete. ListManager will ask you if you're sure before deleting the segment.

## Creating a Segment

Click *create new segment* to be taken to [Segments: New Segment](#). Click *create new triggered segment* to be taken to [Segments: New Triggered Segment](#).

## New/Edit Segment

### New/Edit Segment

---

The Segments: New Segment page allows you to make a segment of your list, based on the criteria you define. The Segments: Edit Segment page is exactly like the New Segments page.

Segments are portions, or fragments of lists, whose members are based on some characteristic or criteria that each member must meet in order for that member to be included in the segment. The clauses describing *each* member *must* be true in order for that member to be included in a segment. A segment is created by picking one or more clauses, each of which is a statement that is true or false for a member, and connecting them together with AND's, OR's, and parentheses, to make one composite statement that is true if the member belongs in the segment. For more information on segment clauses, see [Segments: New/Edit Segment/Essentials](#).

There are three tabs for creating a segment:

#### **Segments: New Segment: Essentials**

The basics required to create a new segment. This page allows you to easily make a segment based on information in your members table. You can also type in an SQL query directly if you have the proper permissions. To see more information on inserting various types of clauses, see [text](#), [numeric](#), [date](#), [action](#), [clickthrough](#), [clickstream](#), [purchase](#), and [interest](#).

#### **Segments: New Segment: Advanced**

This page allows you to join to other tables, change the sort order, and select which columns are displayed when testing. This page is only available if your administrator has given you the proper permissions.

#### **Segments: New Segment: Boundaries**

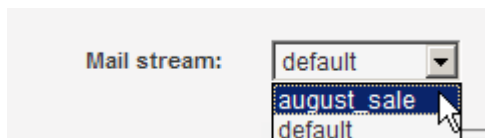
Normally, a segment is limited to normal members of the list you're logged into. You can change the boundaries of the segment to include all lists on your server, or to all members regardless of their membership status. Sending to a segment with these boundaries turned off could anger recipients if not done properly, so be sure you understand what they do before changing these settings.

### Creating a Segment

---

This example shows how to make a segment of all recipients who work in education—they have .edu as their top level domain.

1. In the left Navigation bar, click **Segments**.
2. Click **Create New Segment**. For triggered segments, which are segments that will be mailed to based on a particular action, click **Create New Triggered Segment**.
3. Enter **edu** for the segment's **Name**. Note: A segment name must contain only lower-case alphanumeric characters (a-z, 0-9), hyphens (-), or underscores (\_). There can be no spaces in a segment's name.
4. Enter **Education Addresses** for the segment's **Description**.
5. Select a mail stream: click the **Mail stream** drop-down list, and then choose the mail stream you want.



**NOTE** The first option, No override, means "use the mail stream you chose for the list."

[Mail streams overview](#)

[Create a new mail stream](#)

5. Click **Insert Clause** to set the rules for the segment, for instance, to create a segment for a particular domain, date or action. For this example, select **members\_.Domain\_** on the **If member text field** on the **Text** tab. For details on each type of insertable clause, see [text](#), [numeric](#), [date](#), [action](#), [clickthrough](#), [clickstream](#), [purchase](#), and [interest](#).
6. Click **Insert**. The clause you created appears in the **Query** box:
7. Click **Save and Test**. You will be taken to the Segments: Test Segment page, where you can see the query generated and a sample of the addresses pulled. Note that if you don't have any .edu addresses, no names will be displayed here.

## Segments: New/Edit Segment: Essentials

---

The Segments: New/Edit Segment: Essentials page has the essential elements required for any segment.

### Segment Name



Select a name to identify your segment. This name is not seen by message recipients, so label the content in a way that will help you to identify it later in the Segment main page. A segment name may not have spaces.

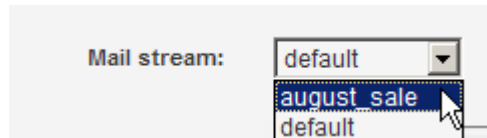
### Description

Select a description to identify your segment. This description is not seen by message recipients, so label the content in a way that will help you to identify it later in the Segment main page.

### Mail Stream

#### To select a mail stream

Click the **Mail stream** drop-down list, and then choose the mail stream you want.



[Mail streams overview](#)

[Create a new mail stream](#)

### Summary

Displays a summary of the descriptions of the clauses inserted into the query to create the segment. If it is a simple segment with clauses that do not need to be summarized, the summary may be blank.

### Query

When a clause is created, and you click on **Insert**, this will then display the clause in the query field. This is where the clauses are put together by inserting the AND, OR, NOT, or parentheses in between clauses.

If you are building your own SQL query (i.e., not using ListManager's query builders), please see [SQL Guidelines](#). If you are joining to another table, see [Joining to Another Table](#).

### Insert Clause

You may build the criteria for the segment using the **Insert Clause** button. Segments are created by picking one or more clauses, each of which is a statement that is true or false for a member. These clauses are then connected together with AND, OR, NOT, or parentheses statements. Once together these clauses or statements create a comprehensive statement. Segments are statements about each member that must be true in order that that member to be included in the segment.

The Segment Builder allows you to create SQL subsets of your list based on fields that are available in your ListManager members table. Fields in other tables (including tables you join to in [Segments: New Segment: Advanced](#)) will not appear here. Depending on your permissions, you may be able to type in your SQL query directly in the **SQL Query** box. For details on each type of insertable clause, see [text](#), [numeric](#), [date](#), [action](#), [clickthrough](#), [clickstream](#), [purchase](#), and [interest](#).

The first three segment clauses (text, numeric, and date) all bring in member data from the member table. These include many built-in fields, such as name, domain, and join date. Demographic fields can be added to this table as well, such as age or gender. The remaining segment clauses (action, clickthrough, clickstream, purchase, and interest) are all events or actions which are on the clicktracking and clickstreamdata tables.

### **AND/OR:**

If you'd like to combine several different criteria in your segment, you'll need to combine them with AND, OR, AND NOT or OR NOT.

For example, let's say you have two additional columns in your members table: one column specifies the kind of pet a member has (the pets column), and the other column specifies the country a member lives in (the country column). If you'd like to create a segment which would send to all the cat owners in England, you'd use AND.

```
pet = cat AND country = England
```

This segment is the intersection of these two sets: only cat owners in England would be in this segment.

If you'd like to send to all cat owners anywhere in the world and to everyone on your list who lives England, you'd use OR.

```
pet=cat OR country = England
```

This segment is the union of these two sets; all cat owners, and all English people would be part of this subset.

As you build your criteria, they will be displayed below in the **Sequel Query** box.

### **NOT**

'NOT' must be combined with an AND or OR, and selects those who do not have a certain criteria.

For example, to send to all pet owners except to those who own cats, you'd use AND NOT:

```
AND NOT pet = cat
```

### **( ) Open and Close Parentheses**

Some segments might require that you put some of your criteria in parentheses so that they're read the way you intend. For example, the following segment is unclear:

```
country = England AND pet = dog OR pet = cat
```

Do you want to send to everyone who lives in England and has a dog, and anyone anywhere who has a cat? Or do you want to send to everyone in England who has a dog or cat? Use parentheses to specify which you'd like:

```
country = England AND (pet = dog OR pet =cat)
```

This query will only pull those who live in England, and who have a cat or a dog.

### Query

As you add fields, your query will be formed in the SQL Query field.

Depending on whether your administrator allows it or not, you may be able to type in your query directly into the Selection Criteria field, and use the [Advanced](#) and [Boundaries](#) tabs to use SQL joins to other fields, pull members from all lists, and other kinds of SQL queries.

If you are building your own SQL query (i.e., not using ListManager's query builders), please see [SQL Guidelines](#). If you are joining to another table, see [Joining to Another Table](#).

### Show More

Click **Show More** to increase by ten the number of lines visible in the query.

### Show Less

Click **Show Less** to decrease by ten the number of lines visible in the query.

## Segments: New Segment: Insert Clause: Text

One or more clauses define the terms for creation of the segment. Each clause is true or false for a member, and can be connected to other clauses by using the AND, OR, NOT, or parentheses.

### If member text field

Select the text field from the drop-down menu.

### Is

Select the desired command from the drop-down menu.

### This value

Enter the value to determine the clause.

### Example:

Selecting a text clause of "If member text field **domain\_** is **equal to yahoo.com**", will create a segment for all members with a domain name of @yahoo.com. This can be paired with one or more clauses by using AND, OR, NOT, or the parentheses.

Note: Some of the comparison options don't work for all kinds of text fields on different database platforms, so it is very important to test the segment to see if the database raises errors. Generally, the problem, if any, will be that "equals", "less than", and "greater than" are not allowed for some types of fields.

### Match Case

If checked, only those results which match the case (upper, lower, or a mixture) exactly will be selected.

## **Segments: New Segment: Insert Clause: Numeric**

---

One or more clauses define the terms for creation of the segment. Each clause is true or false for a member, and can be connected to other clauses by using the AND, OR, NOT, or parentheses.

### **If member numeric field**

Select the text field from the drop-down menu.

### **is**

Select the desired command from the drop-down menu.

### **This value**

Enter the numeric value to determine the clause.

### Example:

Creating a clause that says "If member numeric field **NumBounces\_** is **greater than 5**", will create a segment for all members who have had more than 5 permanent failures. This can be paired with one or more clauses by using AND, OR, NOT, or the parentheses.

## **Segments: New Segment: Insert Clause: Date**

---

One or more clauses define the terms for creation of the segment. Each clause is true or false for a member, and can be connected to other clauses by using the AND, OR, NOT, or parentheses.

### **If this**

Select "exact date and time" or "anniversary" from the drop-down menu.

### **in this field**

Select the desired date field from the drop-down menu.

### **is**

Select the desired command from the drop-down menu.

### **This date**

Enter the date in YYYY-MM-DD or YYYY-MM-DD HH:MM:SS format, or click the calendar to select a date. Note that if you do not enter a time it will default to YYYY-MM-DD 00:00:00, so implicitly, a time of midnight at the start of the entered date is

included (if you selected "exact date and time" instead of "anniversary"). If you enter "NOW" in this field, instead of an actual fixed date, the database will use the current system time whenever the segment is run.

Note: Users of Oracle MUST use YYYY-MM-DD formatting, or results may be incorrect.

Example:

Creating a clause that says "If this **exact date and time** in this field **DateJoined\_** is **equal to 2002-12-31**", will create a segment for all members whose join date is on or after December 31st, 2002. Note that members whose join date happened at some time on Dec. 31st will be included, because the implicit time you entered is midnight at the start of Dec 31st. This would be a way to create a segment of more recent members, for example. This can be paired with one or more clauses by using AND, OR, NOT, or the parentheses.

Example 2:

Creating a clause that says "If this **anniversary** in this field **ConfirmDat\_** is **equal to 2002-12-31**", will create a segment for all members who's anniversary of their confirmation date is on December 31st, 2002. This would be a way to create a segment of members who joined one year ago to send a 1-year anniversary mailing, for example. This can be paired with one or more clauses by using AND, OR, NOT, or the parentheses.

## **Segments: New Segment: Insert Clause: Action**

---

One or more clauses define the terms for creation of the segment. Each clause is true or false for a member, and can be connected to other clauses by using the AND, OR, NOT, or parentheses.

### **If list member**

Select an action performed by the member from the drop-down menu.

### **This mailing**

Select the desired mailing to which this action applies.

### **Before this date (optional)**

Enter the date in YYYY-MM-DD or YYYY-MM-DD HH:MM:SS format, or click the calendar to select a date. Note that if you do not enter a time it will default to YYYY-MM-DD 00:00:00, so implicitly, a time of midnight at the start of the entered date is included. This field can be used alone or in conjunction with the "in the previous X days (optional) field". This is an optional field, because an action clause can be created by just selecting an action and an associated mailing.

### **in the previous X days (optional)**

Enter the number of days prior allowed for the action selected above. Note that this field can be used alone or in conjunction with the "before date (optional)" field. This is an optional field, because an action clause can be created by just selecting an action and an associated mailing.

Example:

Creating a clause that says "If list member **opened** this mailing **2003-08-25Newsletter** before this date **2003-08-31** in the previous X days **10**", will create a segment for all members who opened the August 25th newsletter mailing before August 31st, 2003 and for the 10 days prior, so the segment would be for all members who opened this mailing between August 21st and August 31st. This can be paired with one or more clauses by using AND, OR, NOT, or the parentheses.

## Segments: New Segment: Insert Clause: Clickthrough

---

One or more clauses define the terms for creation of the segment. Each clause is true or false for a member, and can be connected to other clauses by using the AND, OR, NOT, or parentheses.

### **If list member**

Select a clickthrough action from the drop-down menu, either "clicked on" or "did not click on."

### **This URL**

Select the URL from the drop-down menu. Note that in order for the URL to appear in this drop-down menu, it must already be included in a mailing which was sent and had at least one clickthrough. This is how the URL enters the ListManager database. The mailing must be sent with the "opens" detection on. For more information on this, see [Mailings: New Mailing: Tracking](#).

### **In this mailing**

Select the desired mailing to which this clickthrough action applies.

### **Before this date (optional)**

Enter the date in YYYY-MM-DD or YYYY-MM-DD HH:MM:SS format, or click the calendar to select a date. Note that if you do not enter a time it will default to YYYY-MM-DD 00:00:00, so implicitly, a time of midnight at the start of the entered date is included. This field can be used alone or in conjunction with the "in the previous X days (optional) field". This is an optional field, because a clickthrough clause can be created by just selecting an action, a URL, and an associated mailing.

### **In the previous X days (optional)**

Enter the number of days prior allowed for the clickthrough action selected above. Note that this field can be used alone or in conjunction with the "before date (optional)" field. This is an optional field, because a clickthrough clause can be created by just selecting an action, a URL, and an associated mailing.

Example:

Creating a clause that says "If list member **clicked on** this URL **http://www.yoururl.com** before this date **2003-08-31** in the previous X days **10**", will create a segment for all members who clicked on the http://www.yoururl.com URL before August 31st, 2003 and for the 10 days prior, so the segment would be for all members who clicked on this URL between August 21st and August 31st. This can be paired with one or more clauses by using AND, OR, NOT, or the parentheses.

## Segments: New Segment: Insert Clause: Clickstream

---

One or more clauses define the terms for creation of the segment. Each clause is true or false for a member, and can be connected to other clauses by using the AND, OR, NOT, or parentheses.

### If list member

Select a clickstream action from the drop-down menu, either "viewed" or "did not view".

### This page

Select the page from the drop-down menu. Note that a Clickstream Tag must be placed on this page, and this page must have been visited at least once, in order for it to appear here. This is how the page is entered into the ListManager database. For more information on Clickstream Tags, see [Utilities: Other: Action Tags: Clickstream Tags](#).

### From this mailing

Select the desired mailing to which this clickstream action applies.

### Before this date (optional)

Enter the date in YYYY-MM-DD or YYYY-MM-DD HH:MM:SS format, or click the calendar to select a date. Note that if you do not enter a time it will default to YYYY-MM-DD 00:00:00, so implicitly, a time of midnight at the start of the entered date is included. This field can be used alone or in conjunction with the "in the previous X days (optional) field." This is an optional field, because a clickstream clause can be created by just selecting an action, a page, and an associated mailing.

### In the previous X days (optional)

Enter the number of days prior allowed for the clickstream action selected above. Note that this field can be used alone or in conjunction with the "before date (optional)" field. This is an optional field, because a clickstream clause can be created by just selecting an action, a page, and an associated mailing.

### Example:

Creating a clause that says "If list member **viewed** this page **any page** from this mailing **08-20-2003Newsletter** before this date **2003-08-25** in the previous X days **10**", will create a segment for all members who viewed any page from the August 20th, 2003 newsletter mailing, before August 31st, 2003 and for the 10 days prior, so the segment would be for all members who viewed any page from this mailing between August 21st

and August 31st. This can be paired with one or more clauses by using AND, OR, NOT, or the parentheses.

## Segments: New Segment: Insert Clause: Purchase

---

One or more clauses define the terms for creation of the segment. Each clause is true or false for a member, and can be connected to other clauses by using the AND, OR, NOT, or parentheses.

### **Member bought**

Select the command from the drop-down menu.

### **This amount, price/quantity**

Enter the amount. This will apply to either a price or a quantity, as determined here. For instance, 1000 price = \$1000 (or other monetary unit), and 1000 quantity = 1000 units.

### **Of these product codes (optional)**

Enter a product code referencing the item purchased by the member, if any. This can be any descriptive value.

### **Before this date (optional)**

Enter the date in YYYY-MM-DD or YYYY-MM-DD HH:MM:SS format, or click the calendar to select a date. Note that if you do not enter a time it will default to YYYY-MM-DD 00:00:00, so implicitly, a time of midnight at the start of the entered date is included. This field can be used alone or in conjunction with the "in the previous X days (optional) field". This is an optional field, because a purchase clause can be created by just selecting an action, an amount/quantity, a page, and an associated mailing.

### **In the previous X days (optional)**

Enter the number of days prior allowed for the purchase action selected above. Note that this field can be used alone or in conjunction with the "before date (optional)" field. This is an optional field, because a purchase clause can be created by just selecting an action, an amount/quantity, a page, and an associated mailing.

### **On this page**

Select the page from the drop-down menu, referencing the page from which the member purchased the item(s). Note that a Purchase Tag must be placed on this page, and something must then be purchased from this page, in order for it to appear here. This is how the page is entered into the ListManager database. For more information on Purchase Tags, see [Utilities: Other: Action Tags: Purchase Tags](#).

### **From this mailing**

Select the desired mailing to which this purchase applies.

Example:



Creating a clause that says "Member bought **greater than** this amount **1 (quantity)** of this product code **Widget** before this date **2003-08-25** in the previous X days **10** on this page **any page** from this mailing **08-20-03Newsletter**", will create a segment for all members who purchased more than 1 widget from the August 20th, 2003 Newsletter mailing before August 31st, 2003 and for the 10 days prior, so who purchased this between August 21st, 2003 and August 31st, 2003. This can be paired with one or more clauses by using AND, OR, NOT, or the parentheses.

## Segments: New Segment: Insert Clause: Interest

---

One or more clauses define the terms for creation of the segment. Each clause is true or false for a member, and can be connected to other clauses by using the AND, OR, NOT, or parentheses.

### Member showed

Select the command from the drop-down menu.

### This much

Enter a numeric value for the type of interest selected (interest points, stage, or events). Interest points and interest stages are arbitrary values which are determined by the list administrator, but interest events are the total number of interest (including purchase) events, which will usually be page visits. Therefore a member who visited a total of 5 pages with [Interest Tags](#) or [Purchase Tags](#), will have 5 interest events.

### Of this type of interest

Select the type of interest for the clause: interest points, interest state, or interest events. These settings and the numeric values associated with them are predetermined by the list administrator.

### Before this date (optional)

Enter the date in YYYY-MM-DD or YYYY-MM-DD HH:MM:SS format, or click the calendar to select a date. Note that if you do not enter a time it will default to YYYY-MM-DD 00:00:00, so no time will be entered, just the date. This field can be used alone or in conjunction with the "in the previous X days (optional) field". This is an optional field, because an interest clause can be created by just selecting an action, an amount and type of interest, a page, and an associated mailing.

### In the previous X days (optional)

Enter the number of days prior allowed for the interest level selected above. Note that this field can be used alone or in conjunction with the "before date (optional)" field. This is an optional field, because an interest clause can be created by just selecting an action, an amount and type of interest, a page, and an associated mailing.

### On this page

Select the page from the drop-down menu, referencing the page from which the member demonstrated some interest. Note that an Interest Tag must be placed on this page, and something interest event must occur on this page, in order for it to appear here. This is how the page is entered into the ListManager database. For more information on Interest Tags, see [Utilities: Other: Action Tags: Interest Tag](#).

## From this mailing

Select the desired mailing to which this interest clause applies.

### Example:

Creating a clause that says "Member showed **equal to** this much **50 (interest points)** before this date **2003-08-25** in the previous X days **10** on this page **any page** from this mailing **08-20-03Newsletter**", will create a segment for all members who showed exactly 50 interest points from the August 20th, 2003 Newsletter mailing, between August 21st, 2003 and August 31st, 2003. This can be paired with one or more clauses by using AND, OR, NOT, or the parentheses.

## Segments: New Segment: Insert Clause: Survey

---

You can create segments based on the questions answered by a member; for instance, to filter out members who may not have answered a survey, or not answered enough questions. The segment can be based on who took or did not take the survey, who answered which question, or what the response to a particular question was.

### Member

Choose **responded to** or **did not respond to** from the drop-down menu. This refers to the member's response to any survey, or to a particular survey, defined in the second drop-down menu. Choose **any survey** or the specific survey you would like to segment on from the second drop-down menu.

The default options are **responded to** and **any survey**.

### Filter Options

Filter options will not be available if **did not respond to** is selected. They are only available when **responded to** any or one particular survey is selected.

There are three filter options available:

1. **No additional filter option** - this option is always available, and creates a segment based only on whether or not a member responded to or did not respond to any survey (or a particular survey).
2. **Filter based on number of questions answered** - this option is only available if the "responded to" option is chosen for the member.

### Member answered

Select the desired command from the drop-down menu.

### This many questions

Enter the number of questions to correspond with the command above. There is no limit to the number of questions that can be segmented on.

Example: To segment based only on those that answered 3 or more survey questions, select ">=" (greater than or equal to) from the drop-down menu, and enter the number "3" in the questions field.

3. **Filter on how a particular question was answered** - this option is only available if the **responded to** option is chosen for the member *and* a particular survey (not **any survey**) is selected.

#### **Member**

Choose the desired command, **answered** or **did not answer** (in reference to a particular question) from the drop-down menu. Then, select the desired question from the drop-down menu.

#### **In this way**

Choose the desired command, **selected** or **did not select** from the drop-down menu. Then, select the criteria for how the question was answered. If it refers to a fill-in text answer, then two new fields will be visible:

#### **The text answer**

Choose the criteria for determining how the answer to the question will create the segment. For example, **is not null** means that it will be filtered on if *any* text was entered in the fill-in text field answering this question.

The other options are **contains**, **does not contain**, **ends with**, and **begins with**, which allow you to segment based on specific text entered in the response. When one of these options is selected, a new field, **This text value**, will appear, where the text itself can be entered. Up to 200 alphanumeric characters can be entered in this field.

To insert the survey clause, click **Insert**.

## **Segments: New/Edit Segment: Advanced**

---

The Segment Advanced Settings page allows you to set special parameters for your segment.

#### **Join Other Tables**

By default, ListManager only has access to its own database tables. To access data in other tables in your database, list the table names here, separated by commas. Carriage returns are not allowed in this field, to prevent errors resulting from not separating correctly with commas. The standard members table is already included, and need not be specified. The fields in the tables specified here will be available for mail merging.

Example:

```
demographics.customers, demographics.info
```

Adding additional tables here will make their fields appear when [inserting a clause](#).

#### NOTES

- A join statement must be part of your query in order for the table join to function properly. See [Joining to Another Table](#) for more information.
- If you are using MSSQL, do not use brackets when naming your external table. Example: Use dbname.dbo.tablename and not [dbname].[dbo].[tablename]

#### Columns to display

This setting is only relevant for testing purposes, to see what data is returned when you test your segment. If blank, only MemberID\_ and EmailAddr\_ will be displayed when you test your subset. These fields will always be retrieved and need not be specified. To specify additional fields, separate them with commas. Carriage returns are not allowed in this field, to prevent errors resulting from not separating correctly with commas.

Example:  
domain\_, fullname\_

#### Sorting

Using an SQL "ORDER BY" clause, specify the order in which to return results.

Example:  
`members_.EmailAddr_ ASC`

#### After SELECT

This setting is useful for those using ListManager with an Oracle database to tell it to use a specific index, thus improving performance. The Oracle optimizer will not always choose to use an index, even if one has been built, so this feature allows the name of the index to be added as a hint after the SQL for the subset.

## Segments: New/Edit Segment: Boundaries

---

When posting to a list or a segment, ListManager automatically adds some additional restrictions to the member selection query. These restrictions only allow sending of mail to "normal" members (i.e. not held or unsubscribed, or on another list). However, there are times when you might want to send to all members of a list regardless of whether they are set to receive message as sent. Or, perhaps you want to send the message to all members including those who are held.

These types of postings are possible by modifying **Pull only normal members**, **Pull only members receiving regular email** and **Pull only this list's members**. In general, you should never need to modify these settings, and problems can occur if you modify these settings without understanding the consequences. For example, you could end up sending to members who have unsubscribed from your list, or you could send to every member on the server inadvertently.

#### **Pull only normal members**

By default, the segment will pull only "normal" members, not those who have unsubscribed from the list, who are held due to bouncing too much mail, or who have not yet confirmed that they'd like to receive mail from you. By selecting "No," you will send to all members who meet your subset criteria, regardless of the status of their subscription.

*Warning:* By selecting "No," you may be sending to people who do not want to receive your mail. These people may be unhappy about receiving your mail if they haven't opted in, or have already opted out of receiving your mailings. Additionally, if you choose to send to members who are on hold, you will most likely have slower sending speeds and lower success rates.

### **Pull only members receiving regular email**

By default, the subset will only send to members who have selected to receive normal postings, not digests, mimedigests, or who have set themselves to not receive mail at all. By selecting "No, pull ALL members, regardless of email type," you will be sending an email message to members regardless of the type of message they have signed themselves up for.

*Warning:* By selecting "No," you may be sending to people who do not want to receive ordinary email messages from you. These people may be unhappy about receiving email from you at all, or in a format they haven't selected.

### **Pull only this list's members**

By default, the subset will select only members from the list you're currently working in. If you'd like to send to recipients regardless of the list they're subscribed to, select "No, pull members from all lists on the server."

*Warning:* By selecting "No," you may be sending to other lists than the one you're working in. Be sure that the message you're sending is appropriate for all the lists you may be sending to.

## **Triggered Segments**

### **Segments: New Triggered Segment**

---

Triggered segments are a feature of ListManager Enterprise, and are unavailable for Standard or Pro ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Enterprise.

Triggered segments are segments that contain one or more trigger clauses. These clauses identify a specific event or date that happens when the mailing is to be sent. Anything else about the member that does not specify *exactly* when the mailing is to be sent is not a trigger clause, but a regular clause. Triggered segments work in conjunction with [triggered mailings](#) and [sequential mailings](#).

The trigger clause identifies the event that causes the mailing to be sent, but when you actually create the triggered mailing, you can specify exactly how long after the event the mailing should actually be sent. Typically, only one trigger clause is required, but you may want to send the mailing if any one of a list of events occur (see Using Multiple Trigger Clauses below).

Note that the trigger clause identifies the event that causes the mailing to be sent, but when you actually create the triggered mailing you can specify exactly how long after the event the mailing should actually be sent. In the case where you know the date in advance (such as a member's birthday), you can send the mailing to them a certain amount of time before the date.

### Creating a Triggered Segment

From the main segments page, click **Create New Triggered Segment**. This opens the Segment: New Triggered Segment page. Enter a segment name and description, as with any segment.

Click the insert trigger button. This opens the Segment: Insert Trigger page, which is divided into tabs. These are arranged to easily access the desired trigger type. Click on the links below for detailed information on the various trigger types:

- ◆ [Date](#)
- ◆ [Action](#)
- ◆ [Clickthrough](#)
- ◆ [Clickstream](#)
- ◆ [Purchase](#)
- ◆ [Interest](#)

Note that triggers can be used in conjunction with clauses, and they will work together. The best way to see this is with an example:

You want to send a discount offer to members when they visited a particular web page from a particular mailing, but only if they are female and have purchased more than \$100 worth of items in the past 90 days.

This will result in 3 clauses, only one of which is a trigger clause:

< members who are female - regular clause >  
AND  
< members who purchased more than \$100 worth of items in the past 90 days - regular clause >  
AND  
<send the mailing when the member visits the particular web page from the particular mailing - trigger clause >

Important note:

If this example is entered incorrectly, such as:

< members who are female - regular clause >  
OR  
< members who purchased more than \$100 worth of items in the past 90 days - regular clause >

OR

< send the mailing when the member visits the particular web page from the particular mailing - trigger clause>

it will result in sending the mailing to ALL female members or to ALL members who purchased more than \$100 in the last 90 days every time the triggered mailing is sent. This is why triggered segments and mailings must be created and tested with care.

### Using Multiple Trigger Clauses

Typically only one trigger clause is required for a triggered mailing, but sometimes you may want to send the mailing if any one of a list of events occur. For example, you might want to send a particular promotion to someone who visits any one of 3 different pages:

<trigger clause when member visited page1>

OR

<trigger clause when member visited page2>

OR

<trigger clause when member visited page3>

You might want to only send to members who visited all 3 on the same day. You could do this by running the triggered mailing once at the end of each day, and using this segment:

<trigger clause when member visited page1>

AND

<trigger clause when member visited page2>

AND

<trigger clause when member visited page3>

In another example, you might want to send a particular promotion to adults once they reach 1000 total interest points on your Web site, but only send to youths once they reach 2000 total interest points on your Web site:

(

<regular clause - member is aged 25 or over>

AND

<trigger clause when the member reaches 1000 interest points total for the first time>

)

OR

(

<regular clause - member is aged less than 25>

AND

<trigger clause when the member reaches 2000 interest points total for the first time>

)

## Segments: New Triggered Segment: Insert Trigger: Date

---

### Date type

Specify whether the trigger will be an "exact date and time" or an "anniversary." Selecting "anniversary" will create a trigger that is repetitive on the annual anniversary of the date selected in the Date field. A good example for selecting "anniversary" would be if the field contains the date on which the member was born, and you would like to send them a message on their birthday (the anniversary of their date of birth).

### Date field

Select the corresponding date field from the drop-down menu. These correspond with the date tables, for instance DateBounce\_ or DateJoined\_.

For more information on how triggered segments work, see [Segments: New Triggered Segment](#).

## Segments: New Triggered Segment: Insert Trigger: Action

---

### Action

Select the action to create the trigger. These can be "opened," "clicked on any url in," "visited any page," or "purchased after." This refers to the type of action to occur in the mailing that will cause the mailing to be sent.

### Mailing

Select the desired mailing or "any mailing" from the drop-down menu.

### Trigger will send to this member

The trigger can either send the mailing to the member (that performed the set action in the selected mailing) every time, or only the first time. This allows you to send the mailing only once, when the trigger is met, or every single time it is met. For instance, if you want to send the triggered mailing only once, after the first time they've opened the desired mailing, then this would be set to "the first time". If "every time" is selected, and the member happens to open the mailing more than once, the triggered mailing will be sent each time.

For more information on how triggered segments work, see [Segments: New Triggered Segment](#).



## Segments: New Triggered Segment: Insert Trigger: Clickthrough

---

It is often easiest to create triggered segments by following the fields in order so that they "read" like a sentence.

### **Member**

Currently, the only option available here is "clicked on", since this refers to clickthroughs for particular URLs.

### **This URL**

Select the desired URL from the drop-down menu. Note that in order for a URL to appear here, it must have been included and sent in a mailing, and then clicked on at least once.

### **In this mailing**

Select the desired mailing or "any mailing" from the drop-down menu.

### **Trigger will send to this member**

The trigger can either send the mailing to the member (that clicked on the set URL in the selected mailing) every time, or only the first time. This allows you to send the mailing only once, when the trigger is met, or every single time it is met. For instance, if you want to send the triggered mailing only once, after the first time they've clicked on the selected URL, then this would be set to "the first time". If "every time" is selected, and the member happens to click on the URL more than once, the triggered mailing will be sent each time.

For more information on how triggered segments work, see [Segments: New Triggered Segment](#).

## Segments: New Triggered Segment: Insert Trigger: Clickstream

---

It is often easiest to create triggered segments by following the fields in order so that they "read" like a sentence.

### **Member**

Currently, the only option available here is "viewed", since this refers to clickstreams for particular URLs.

### **This page**

Select the desired page from the drop-down menu. A page will appear in this drop-down menu only if it has been viewed at least once.

### **From this mailing**

Select the desired mailing or "any mailing" from the drop-down menu.

### **Trigger will send to this member**

The trigger can either send the mailing to the member (that viewed the selected page in the selected mailing) every time, or only the first time. This allows you to send the mailing only once, when the trigger is met, or every single time it is met. For instance, if you want to send the triggered mailing only once, after the first time they've viewed the selected page, then this would be set to "the first time". If "every time" is selected, and the member happens to view the set page more than once, the triggered mailing will be sent each time.

For more information on how triggered segments work, see [Segments: New Triggered Segment](#).

## **Segments: New Triggered Segment: Insert Trigger: Purchase**

---

It is often easiest to create triggered segments by following the fields in order so that they "read" like a sentence.

### **Member bought**

Select the desired command for the purchase trigger. These can be:

- = equal to
- < less than
- > greater than
- <= less than or equal to
- >= greater than or equal to
- <> not equal to

Note: For the "< less than" and "<= less than or equal to" options, only members who have made at least one purchase of this type will be selected. Members who have made no purchase at all can only be detected by specifying "= equal to" and a value of 0 (zero). So for example, if you would like all members who made less than \$1000 in purchases last month, *including* those who made no purchases at all, you will need to insert two trigger clauses: those who made "<= less than or equal to" \$1000 in purchases in the last month, AND those who made "= equal to" \$0 in purchases in the last month.

### **This amount**

Enter the amount. This will apply to either a price or a quantity.

### **Price/Quantity**

Select whether the amount specified above refers to a price (\$) or quantity. For example, 500/price = \$500 (or other monetary unit), and 500/quantity = 500 units.

### **Since when**

Select the time frame for the purchase. This can mean that the member bought X dollars or units "since the last run time", "since forever", or "since forever, reached for the first time". This third option means that the amount entered in the "This amount" field is a total since the beginning of time, and the trigger will fire only the first time that total is reached.

### **of this product code (optional)**

Enter a product description, code, sku, etc. This will restrict the calculation to totaling the purchases of that particular code type only.

### **On this page**

Select the page from the drop-down menu for the purchase. For the page to appear here, it must already be in the database as having generated a purchase event. Generally, purchases will come from only one page, but if there is more than one where purchases have been made from, all of those will be options here.

### **From this mailing**

Select the desired mailing or "any mailing" from the drop-down menu.

For more information on how triggered segments work, see [Segments: New Triggered Segment](#).

## **Segments: New Triggered Segment: Insert Trigger: Interest**

---

It is often easiest to create triggered segments by following the fields in order so that they "read" like a sentence.

### **Member showed**

Select the desired command for the interest trigger. These can be:

- = equal to
- < less than
- > greater than
- <= less than or equal to
- >= greater than or equal to
- <> not equal to

Note: For the "< less than" and "<= less than or equal to" options, only members who have generated at least one interest point of this type will be selected. Members who have generated no interest points at all can only be detected by specifying "= equal to" and a value of 0 (zero). So for example, if you would like all members who generated less than 1000 interest points in the last month, *including* those with no interest points, you will need to insert two trigger clauses: those who generated "<= less than or equal

to" 1000 interest points in the last month, AND those who generated "= equal to" 0 (zero) interest points in the last month.

### **This much**

Enter the interest value (interest points, stage, or events) in whole numbers.

### **Of this type of interest**

Select the type of interest that the command and type entered above refer to. This can be "interest points", "interest stage", or "interest events".

### **Which occurred**

Select the time frame for the interest point/stage/event. This can mean that the member showed X amount of interest points/stage/events, "since the last run time", "since forever", or "since forever, reached for the first time". This third option means that the amount entered in the "This much" field is a total since the beginning of time, and the trigger will fire only the first time that total is reached.

### **On this page**

Select the page from the drop-down menu for the purchase. For the page to appear here, it must already be in the database as having generated an interest event. There may be several pages that generate different types of interest events.

### **From this mailing**

Select the desired mailing or "any mailing" from the drop-down menu.

For more information on how triggered segments work, see [Segments: New Triggered Segment](#).

## **Segments: New Triggered Segment: Insert Trigger: Survey**

---

You can create triggered segments based on a member's survey responses; for instance, to filter out members who may not have answered a survey, or not answered enough questions. The segment can be based on who took or did not take the survey, who answered which question, or what the response to a particular question was.

When creating a triggered segment, the member event that triggers the mailing to be run (i.e. opening a mailing) will take precedence over the survey segment rules. The mailing will be sent to the survey segment only after the triggering event occurs.

### **Member**

Choose **responded to** or **did not respond to** from the drop-down menu. This refers to the member's response to any survey, or to a particular survey, defined in the second drop-down menu. Choose **any survey** or the specific survey you would like to segment on from the second drop-down menu.

The default options are **responded to** and **any survey**.

## Filter Options

Filter options will not be available if **did not respond to** is selected. They are only available when **responded to** any or one particular survey is selected.

There are three filter options available:

1. **No additional filter option** - this option is always available, and creates a triggered segment based only on whether or not a member responded to or did not respond to any question in any survey (or a particular survey).
2. **Filter based on number of questions answered** - this option is only available if the **responded to** option is chosen for the member.

### Member answered

Select the desired command from the drop-down menu.

### This many questions

Enter the number of questions to correspond with the command above. There is no limit to the number of questions that can be segmented on.

Example: To segment based only on those that answered 3 or more survey questions, select ">=" (greater than or equal to) from the drop-down menu, and enter the number "3" in the questions field.

3. **Filter on how a particular question was answered** - this option is only available if the **responded to** option is chosen for the member *and* a particular survey (not **any survey**) is selected.

### Member

Choose the desired command, **answered** or **did not answer** (in reference to a particular question) from the drop-down menu. Then, select the desired question from the drop-down menu.

### In this way

Choose the desired command, **selected** or **did not select** from the drop-down menu. Then, select the criteria for how the question was answered. If it refers to a fill-in text answer, then two new fields will be visible:

### The text answer

Choose the criteria for determining how the answer to the question will create the segment. For example, **is not null** means that it will be filtered on if *any* text was entered in the fill-in text field answering this question.

The other options are **contains**, **does not contain**, **ends with**, and **begins with**, which allow you to segment based on specific text entered in the response. When one of these options is selected, a new field, **This text value**, will appear, where

the text itself can be entered. Up to 200 alphanumeric characters can be entered in this field.

To insert the survey clause, click *insert*.

## Joining to Another Table

---

ListManager allows you to join its members\_ table to another table in your database or to any database ListManager can access. Once you have joined to another table, you may further segment your list based on criteria contained in that other table. If you send to a segment which joins to other tables, you may merge in information about members contained in those tables.

To join to another table, you must have a key for each member in your ListManager members\_ table which corresponds to a primary key in your table. Joining on non-unique fields (such as email address) will likely cause duplicate results to be returned, which will cause many problems.

See [SQL Guidelines](#) for more information about how to create your own SQL queries in ListManager.

In the following example, members have been imported into the ListManager members\_ table with the primary key for the demographics table in the members\_.UserID\_ field.

1. Create a new segment by clicking on the **Segments** tab and clicking on create new segment.
2. Click on the **Advanced** tab.
3. Enter the table name that ListManager should join its members\_ table to in **Join Other Tables**. Example:

```
demographics
```

4. (Optional) Enter **Columns to Display** from your table that you would like displayed in your test results to verify your segment worked. Example:

```
city
```

5. Click on the **Essentials** Tab.
6. Enter a **Segment Name** and **Description**.
7. Enter the SQL "where" clause in **Query** that joins the table to the ListManager members\_ table and any additional query. Example:

```
demographics.id = UserID_ AND city='Boston'
```

8. Click Save and test.

**NOTE** ListManager supports Views and Tables, but not Linked Tables.

## SQL Queries and ListManager

---

ListManager uses SQL queries to determine who should receive a mailing, and to merge in demographic data from tables other than the ListManager members\_ table. When building your own SQL queries, please note the following limits to the syntax and commands that may be used.

Note: We recommend that your DBA tune your SQL query prior to running it through ListManager. Queries that are very inefficient can lead to performance problems for ListManager. If the database server is very busy processing an inefficient query and doesn't have the resources available to respond to queries, ListManager's performance generally will suffer. Inefficient queries will directly affect mail sending speeds, but will also affect the user interface, as many pages display some database information.

1. Feel free to [join to tables](#) outside of the ListManager provided tables. In fact this is encouraged as the most efficient way to mail merge demographics data. These joins should be made to be efficient by using a unique indexed column like MemberID, so the mail merge logic will allow for high-speed parallel execution of mail merging.

2. The query must be written in SQL-87 syntax, not SQL-92 syntax. For example:

```
select *
from members , lists
where lists_.Name_ = members_.List_
```

Although the following query works, it is inefficient and may cause poor performance:

```
select *
from members
inner join lists
on lists_.Name_ = members_.List_
```

3. DISTINCT is already added to segments, so should not be included in your queries. Note that this also limits your ability to select some column data types, such as text blobs.

Although DISTINCT is added to the query for the purpose of determining the recipient list, you must make their query return only one member-row per member, i.e., queries that return duplicate member IDs will cause problems.

4. UNION cannot be used in queries.

5. Dates and times that are not provided in column data need to be able to be parsed by the database server. Microsoft is quite good about being able to determine the format of the date/time as the query is processed, but Oracle requires that the user enter the data in a specific format. ListManager sets the format when it connects to Oracle so that all the queries can be standardized. That format is:

YYYY-MM-DD HH24:MI:SS

Microsoft SQL Server users should have success providing dates and times in a variety of formats, but do watch out for ambiguities of month and date. A string format of '1-2-2000' could be January 2, 2000, or February 1st, 2000. How this date is interpreted can vary by local custom, so Europe might have a different interpretation of this date than would the United States. Therefore it is recommended to use unambiguous formats whenever possible.

6. The use of index hints is discouraged, and hints which result in dirty reads should never be used. ListManager uses transactions and other logic to ensure the database integrity is maintained. Allowing dirty reads violates this design and can lead to inaccurate results which Lyris cannot support.
7. The use of stored procedures to create segments is not allowed. ListManager must be able to modify the SQL to use it for several different purposes.
8. The SQL provided cannot use grouping operations (GROUP BY, HAVING), and therefore cannot use aggregate operations (like SUM or COUNT).

### **Cross-list Queries**

Queries that span lists are an advanced option allowed by ListManager. However, its use can lead to confusion. The data for mail merging that would normally be constant, such as the site name, can vary if the segment is allowed to span lists. ListManager will potentially use the wrong data for that member for mail merging, which can lead to confusion and erroneous results. Therefore it is recommended that this option be used with great care, and with significant testing before used in a production environment.

### **Views**

You may create views and use them as part of segment creation. ListManager will treat the view as another table and will simply execute the SQL. However, keep in mind that it could be possible to create a view with criteria that conflicts with other criteria added to the query by ListManager, resulting in either no rows or a SQL error, so please test before production use.

Views can often lead to very inefficient SQL, so be sure your DBA has reviewed the SQL before attempting to use it in a production environment.



# Mailings

## Mailings

---

A mailing is a message you send to your entire list, or to segments you've created previously. You can create your message on the fly, or import [content](#) you've created previously.

**\*\*Note:** As of ListManager 7.8, you can send as many concurrent mailings as your hardware will allow. There is no job limit based on SQL connections or the ListManager application itself. ListManager is not sending one mailing followed by another, etc.; rather it is sending multiple mailings concurrently.

To work with Mailings, in the left Navigation bar, click **Mailings**. You can:

1. [Create new mailings](#)
2. [Approve mailings](#)
3. Check the Mailing status for [outgoing mailings](#), [currently active mailings](#), [completed mailings](#), or [mail queues](#)
4. Create Advanced Mailings, both [triggered](#) and [sequential](#)
5. View the progress of your [outgoing mailings](#)
6. Send [test mailings](#)

Before sending out your message, you can test your mailing to see what the message will look like, and [schedule](#) when you'd like the message to be sent. You may also [purge recipients](#) who have received other messages, or send to a sampling of your list or segment.

Use [tracking](#) to see if recipients open your message, and if they can see messages in HTML. Later, you can see the success of your message in [Reports](#).

Once you've created mailings, or received them via email, you may [approve or delete](#) them.

If you are moderating a discussion list (where members submit mailings to the list), the Approval Wizard helps you work quickly as you approve and delete mailings in the order in which they were submitted. You also have the option of deleting mailings with feedback so contributors know why their mailing was rejected. The Approval Summary shows you if any of your lists have mailings waiting to be approved.

All of your mailings, whether completed or being sent, may also be viewed in Mailings.

### Notes for those upgrading from ListManager 5.0

If you are using the ListManager Mailings menu to create mailings for your list, ListManager will automatically set Enable Scripting to Admins Only if previously disabled, and change the Scripting Level to Full. For more information about these settings, see [Utilities: List Settings: For Programmers: Email Scripting](#).

# How to Get the Most Out of Mailings

---

ListManager allows you to easily create, monitor, and then report on your mailings. The following is a brief description of how many users will approach mailings in ListManager. This is a workflow approach, outlining the step-by-step process which is common when working with mailings.

## Creating Mailings

---

Creating mailings involves the general process of writing the content to be included in your mailing, defining the recipients (lists or segments), and testing the mailing. Once it has been approved, then it can be sent, where it will be sent concurrently with any other mailings that may be in progress.

To create a mailing, in the left Navigation Bar, click **Mailings**, and then click **New Mailing**. From here the details for the [message](#), [recipients](#), [tracking](#), [scheduling](#), and [internationalization](#) can be specified.

Generally, when creating a mailing, you will have already created your [content](#), which is then imported into the mailing.

On the **Recipientst**ab, you can specify any [segments](#) to receive this mailing, if you would like to send it to a subset rather than the entire list. In addition, here, recipients can be [purged](#) (excluded from the mailing), and you may prevent those who have received too much email recently from receiving this message by editing the [recency](#).

On the **Tracking**tab, you can set whether you would like to track opens and detect HTML capability. Generally you will want to set these to "yes", because this will allow you to then monitor the results of your mailing when it is complete (see below).

It is strongly recommended that you [test](#) your mailing prior to sending it, to verify that your content appears the way you intend it to, and that it is functioning properly.

ListManager also allows you to create advanced mailings, including [triggered](#) and [sequential](#) mailings, which work in conjunction with [triggered segments](#). These allow you to create a mailing and then have it sent based on some specified action by a recipient, such as opening a previous mailing or clicking on a URL.

## Approving Mailings

Once you have created your mailing, it will fall into the [Needs Approval](#) category, where you can edit the mailing again if necessary, retest it, [schedule](#) it, etc. Once it is approved it can be sent. Once it has been sent, you can monitor your mailing in the Mailing Status section of mailings (see below).

## Monitoring Mailings

---

Monitoring, or tracking mailings involves viewing delivery reports, looking at the mail queue, and checking the general status of the mailing as it progresses. Mailings are sent concurrently with other mailings, so ListManager will attempt to resend to those

who experience transient failures as many times as you specify. During this process, you can track what is going on.

In the left Navigation Bar, click **Mailings**, and then point to **Mailing Status**. Click one of the commands that appear to see all of your [outgoing mailings by date](#), [completed mailings from the past week](#), and [currently active mailings](#). These display a list of mailings, and show you the name of the mailing, the date it was created, the number of recipients, and any recipients that have yet to be delivered to. In addition, from here you can click on the mailing ID number, to view the outgoing mailing:

When you view an outgoing mailing you can see the [message body](#) and [message header](#).

The **Recipients** tab displays the current status of the mailing, including how many have been successfully sent, # of attempts, etc. From here you can see the individual status of each recipient receiving a message. The *view recipient details* button takes you to the [Mailings: View Outgoing Mailing: Mailing Recipients](#) page, where you can see each member (recipient), their status, and from there access their [member information](#) and the [sending details](#). If there are any permanent failures, you can see the [rejection messages](#) here as well. This tells you the type of failure and displays the rejection message itself. The level of detail seen in the recipient log must be set in [Utilities: List Settings: Basic Information: Enable Features](#).

The **Log** tab displays the log for this mailing. This log is always available.

The **Mail Queue** tab displays current information about the mailing and allows you to pause the mailing when it is in progress. From here a mailing can be paused temporarily, and then stopped completely or continued.

## Analyzing Mailings

---

Once your mailing has been completed, you will want to analyze the results. This includes viewing any errors that may have resulted, and checking the performance of your list, as well as evaluating the recipient actions, such as how many opened the mailing or clicked on a particular URL. Details can be seen on a per-recipient basis, allowing you to see exactly what happened with each message sent.

To view mailing errors, you can see any [rejection messages](#) that resulted. This displays any permanent or temporary failures, and allows you to access the member details directly from here as well.

To view many helpful reports, in the left Navigation bar, click **Reports**, and then click **Mailings**. With these you can check the performance of your list. The [Delivery table](#) displays statistical information about each mailing, including # and % of tries, # and % of sends, and fail #'s. The [Mailings in queue statistics table](#) shows the same information, but only for mailings which are currently running.

Some of the charts which are useful in analyzing list performance include:

The "Success and failure count" chart, which shows the historical performance of success and failures over time. This chart is accessible by going to Reports: Mailings: Delivery Statistics: Delivery Results: Historical Performance.

The "Success %" chart, which shows the last 19 mailings and compares their % of success. This chart is accessible by going to Reports: Mailings: Delivery Statistics: Delivery Results: Compare recent mailings. Also here are the "Success count", "Failure %", and "Failure count" charts, which can be useful as well.

Individual recipient information can be seen in Reports: Mailings: Delivery Statistics: Number of recipients.

The [Mailing statistics](#) table, accessible from Reports: Mailings, is very helpful because it displays information about recipients, opens, clickthroughs, clickstreams, purchases, and interest events. From here, charts of these individual items can be accessed by clicking on the number next to the desired information.

[Tracking Statistics](#) are also very helpful to find out what happens after the mailing is sent, regarding opens, clickthroughs, forwards, etc.

## Keywords That Can Interfere With a Mailing

---

If a member of your mailing list has an email address that contains a keyword reserved by ListManager, email to that address may fail. Here is a list of reserved keywords, formatted as regular expressions for easy searching:

first lines of message:

```
"^[ \r\n\t]*LOGIN"  
"\\^[ \r\n\t]*LOGON"  
"\\^[ \r\n\t]*DELETE"  
"\\^[ \r\n\t]*UNSUBSCRIBE"  
"\\^[ \r\n\t]*REMOVE"  
"\\^[ \r\n\t]*PLEASE REMOVE"  
"\\^[ \r\n\t]*PLEASE DELETE"  
"\\^[ \r\n\t]*PLEASE UNSUBSCRIBE";
```

From:

```
"\\|POST.*MASTER"  
"\\|WPUSER"  
"\\|$EMD"  
"\\|VMMAIL"  
"\\|MAIL.*SYSTEM"  
"\\|MAISER"  
"\\|MAIL.+AGENT"  
"\\|MAIL.+DAEMON"  
"\\|TCPMAIL"  
"\\|BITMAIL"  
"\\|MAILMAN"  
"\\|^LISTMAN"  
"\\|^LISTSERV"  
"\\|^MAJORDOMO"  
"\\|^LISTPROC"  
"\\|^SERVER"  
"\\|^LYRIS$"  
"\\|^CRENLIST";
```

Subject:

"DELIVERY.\*ERROR"  
 "\\|DELIVERY.\*REPORT"  
 "\\|DELIVERY.\*PROBLEM"  
 "\\|WARNING.\*FROM.\*UUCP"  
 "\\|USER.\*UNKNOWN"  
 "\\|UNDELIV.\*MAIL"  
 "\\|UNDELIV.\*MESS"  
 "\\|PROBLEM.\*DELIVER.\*MAIL"  
 "\\|PROBLEM.\*DELIVER.\*MESS"  
 "\\|CAN.\*DELIV.\*MAIL"  
 "\\|UNABLE.\*DELIV.\*MAIL"  
 "\\|UNABLE.\*DELIV.\*MESS"  
 "\\|MAIL.\*DELIV"  
 "\\|MESS.\*DELIV"  
 "\\|FAIL.\*MAIL"  
 "\\|FAIL.\*MESS"  
 "\\|MAIL.\*FAIL"  
 "\\|MAIL.\*RETURN"  
 "\\|RETURN.\*MAIL"  
 "\\|MAIL.\*ERROR"  
 "\\|MAIL.\*RECEIV"  
 "\\|MESS.\*RECEIV"  
 "\\|MESS.\*DELIV"  
 "\\|MAIL.\*DELIV"  
 "\\|INTERCEPT.\*MAIL"  
 "\\|WAITING.\*MAIL"  
 "\\|READ.\*RECEIPT"  
 "\\|RECEIPT.\*NOTIFIC"  
 "\\|STATUS.\*SIGNAL"  
 "\\|ERROR.\*CONDITION"  
 "\\|NO.\*REQUEST.\*FOUND"  
 "\\|AUTO.\*REPLY"  
 "\\|AUTO.\*GENERAT"  
 "\\|AUTO.\*ANSWER"  
 "\\|WAITING.\*MAIL"  
 "\\|. \*ON.\*VACATION"  
 "\\|VIA.\*VACATION"  
 "\\|CONCIERGE.\*NOTICE"  
 "\\|AWAY.\*FROM.\*MAIL"  
 "\\|CAN.\*ANSWER"  
 "\\|CAN.\*REPLY"  
 "\\|OUT.\*OFFICE"  
 "\\|MESSAGE.\*CONFIRMATION"  
 "\\|ABWESENHEITSNOTIZ"// german vacation notification  
 "\\|RECEIPT OF.\*MESSAGE"  
 "\\|OUT.\*TOWN";

# Deliverability

## Deliverability

---

The major focus of ListManager 10.0 has been improved deliverability. Over time, Internet service providers (ISPs) have come up with methods for filtering and rejecting emails to deal with the increasing volume of unwanted commercial email (spam). This can sometimes interfere with the delivery of email from legitimate senders due to inadvertently using the wrong phrase or server configuration. To address these types of problems, Lyris has delivered a set of features and best practices to maximize the possibility of getting email delivered.

### Deliverability Improvements

Before version 10, ListManager used a very simplistic method for detecting bounces. It used the numeric bounce codes returned by mail servers; all bounces were treated as equivalent. Beginning with version 10, ListManager parses the textual message (SMTP response text) returned from mail servers. Response messages are broken down into a number of categories, with each requiring different behavior. Here are some of the basic categories:

**Invalid user:** When ListManager sees a response code that corresponds to this category, the email address is put on hold server-wide immediately.

**Filtered Content:** Content that trips a spam filter or has other characters that cause it to be rejected (e.g., the message size is too large).

**Technical Issues:** The destination server is consistently busy or otherwise unavailable.

**Banned IP:** The IP address sending the email has been banned, typically for excessive complaints or for attempting to email too many invalid users at that domain

**Transient Failures:** The destination mailbox is temporarily unavailable (usually because it is full).

### Dynamic Deliverability

Besides indicating the status of the recipient, the SMTP response text is often used to relay other information back to the sender. Typical messages can be paraphrased as "you have too many simultaneous connections to our servers" or "too many messages sent per connection opened." In such cases, ListManager dynamically adjusts its behavior to accommodate the sending characteristics signaled by the destination server; this maximizes deliverability and keeps sending speed as high as possible.

## Mail Streams

---

Until version 10, ListManager could only send messages over one IP address, which was fixed for all the lists associated with a particular site. ListManager 10 introduces the concept of mail streams, which bind one or more IP addresses together to form a common sending unit. This sending unit has the ability to cooperatively send particular messages out in parallel. Not only does this help speed up sending into the major ISPs by potentially opening up more parallel connections during delivery, but it greatly

increases the tolerance of sending blocks. When a destination server signals (via the SMTP response text) that it will not accept any more email from a given IP address, a "block" is established; ListManager records that block, which consists of a sending IP/destination IP address pair. ListManager stops sending from that IP address to the particular destination IP address, and displays that block in the mail streams report. The block helps prevent further deterioration of the reputation of the IP address.

ListManager will probe the block hourly to see if it is still in force. Server administrators can also intervene and clear blocks once the situation that caused the block has been resolved. During the time that a particular block is in place, ListManager can still send messages out on the other IP addresses associated with the mail stream in order to maximize delivery. If a destination domain is totally blocked (i.e., there are blocks for every possible IP pair between the mail stream and the destination domain), ListManager stops pulling recipients for the blocked domain for messages using that particular mail stream. This maximizes ListManager's ability to keep sending to other destinations.

Mail streams can have default associations with sites, lists, and segments. Any mail stream available on the server can be used for any message being sent from the server.

[Creating a new mail stream.](#)

## New/Edit Mailing

### Mailings: New Mailing

---

To send a message to your list, you need to create a mailing. A mailing can be a message you compose in the New Mailing page, or [content](#) you've created previously.

You may then choose to send your mailing to your entire list, or select [segments](#) to send to. You may also purge recipients of previous messages if you have been saving that data.

#### Creating a New Mailing To Be Sent To Your Entire List

To create a simple mailing to your entire list, follow these instructions:

1. In the left Navigation bar, click **Mailings**, and then click **New Mailing**.
2. Click import content in the lower right corner to insert it into your message if you have already created [content](#) which you'd like to send. You may then skip steps 3-6 below. If not, create your message on the **Message tab**.
3. Edit the **Mailing Name** field. This name is not seen by message recipients, so label the mailing in a way that will help you to identify it later. 70 characters are allowed in the Mailing Name field.
4. Edit the **From:** field. By default, your email address will appear there.

5. Edit the **To:** field. By default, the To: field is set to %%nameemail%%, which will merge the name and email address of the recipient.

The **To:** field does not actually select the message's recipients. When building your mailing, you'll specify the segment or lists to whom you'd like to send the message.

6. Enter the **Subject:** of the message. Recipients will see this line as the subject of the message they receive.

7. Enter the **Text Message** and/or **HTML Message** you'd like to send.

You may create just a text or HTML body, and that is what will be sent to your recipients. Or, you can create both, and send a message that has both text and HTML. This format is called multipart-alternative, and ListManager will create the correct headers and boundaries automatically. Recipients who can see HTML will only see your HTML message; those who can't, will see the text.

8. Click **Preview** to see what your message will look like in the interface. Click **Save and Test** to see what your message will look like in your email client. Or, click **Save**. You'll be taken to the [Mailings: Need Approval](#) Page, where you can send, test, schedule, copy, or delete the content you just created.

### **Sending to Different Lists or to Segments**

1. Follow the steps above to create a new mailing, but before saving your message, click on the **Recipients** Tab.
2. Click choose segments.
3. Select the lists and segments that should receive this mailing. Only the segments and lists available to you will be displayed here.
4. Click on **OK**, and continue composing your message. When you're done, click **Save** or **Save and Test**.

### **Sending to a Sample of Your List**

1. Follow the steps above to create a new mailing, but before saving your message, click on the **Recipients** Tab.
2. Enter the number of recipients who should receive a sample mailing in **Sample size**. ListManager will select a random sampling of your list of the size you've specified.
3. Continue posting your message. When you're done, click **Save** or **Save and Test**.



4. You may later purge these sample recipients when sending a new message.

### **Purging Recipients of Previous Mailings**

1. Follow the steps to create a new mailing, but before saving your message, click the **Recipients** Tab.
2. Click choose mailings (to purge from).
3. Select the mailings whose recipients should NOT receive this mailing.
4. Click **OK**, and continue composing your message. When you're done, click **Save** or **Save and Test**.

#### Notes

- Your list must be set to allow recipient purging. See [Mailings: New Mailing: Recipients](#) for more information about those settings.
- Recipients are purged even if they were sent the initial mailing but did not actually receive it.

### **Preventing Recipients from Receiving Too Much Email**

1. Follow the steps to create a new mailing, but before saving your message, click on the **Recipients** Tab.
2. Click edit recency.
3. For **Purge email addresses who have received**, select **more than**.
4. For **this number of mailings**, enter the maximum number of mailings a recipient should receive in the period of time specified.
5. For **in this past number of days**, enter the number of days to check for the number of mailings specified above.
6. Click on **OK**, and continue composing your message. When you're done, click **Save** or **Save and Test**.

### **Tracking Opens or HTML Capability**

1. Follow the steps to create a new mailing, but before saving your message, click on the **Tracking** Tab.
2. Select **Yes** for **Track opens** to track how many people open your message.

3. Select **Yes** for **Detect HTML Capability** to track whether recipients can receive HTML.
4. Continue composing your message. When you're done, click **Save** or **Save and Test**.

### Scheduling a Message

1. Follow the steps to create a new mailing, but before saving your message, click on the **Schedule** Tab.
2. Type in the date and time you'd like the message to be sent in **Send when**. Use one of the following formats:

YYYY-MM-DD HH-MM-SS

MM/DD/YY

YYYY-MM-DD

3. By default, the date and time shown in your message showing when it was sent will be rewritten to be the time you schedule it to be sent. If you'd like it to be the date when it was created, change **Rewrite Date When Sent** to **No**.
4. Continue composing your message. When you're done, click **Save** or **Save and Test**. You may also schedule your message in [Mailings: Need Approval](#).

### Creating a Recurring Message

It may be convenient to have the same mailing be resent every day, week or month if you are using [conditional content](#) to change the contents of the message sent, or if the message is sent to a [segment](#) such as all new members who joined on a certain date. A list FAQ can also be resent regularly, reminding list members of the list's rules.

1. Follow the steps to create a new mailing, but before saving your message, click on the **Schedule** Tab.
2. Type in the date and time in **Send When**. Use one of the following formats:

YYYY-MM-DD HH-MM-SS

MM/DD/YY

YYYY-MM-DD

3. Enter the number of days ListManager should wait before resending this message in **Resend after this many days**. If you enter 1, it will be sent every day; if you enter 7, every week.
4. Click on **OK**, and continue composing your message. When you're done, click **Save** or **Save and Test**. You may also schedule your message in [Mailings: Need Approval](#).

**Important note for users of earlier versions of ListManager:** The list, site or server message wrapping will not be automatically included to your message if you create it through the ListManager administrator GUI. Please remember to add these instructions to your content or mailing, or send the message to the list via email. See [Content: Insert Field: Unsubscribe](#) to see how to do so quickly and easily.

## Mailings: New Mailing: Message

---

The fields on the Essentials page are required for all mailings you create. For a step-by-step guide to making mailings, see [Mailings: New Mailing](#).

### Mailing Name

**Select a name to identify your mailing. This name is not seen by message recipients, so label the mailing in a way that will help you to identify it later in the Mailings main page. 70 characters are allowed in the Mailing Name field.**

### From:

Required. The name and email address that should appear in the message's From: line. By default, your email address will appear in this field. To insert mail merge tags or conditional text, [create content](#) and import it into your mailing.

Examples of valid values for this field:

```
bob@example.com
Bob Smith <bob@example.com>
bob@example.com (Bob Smith)
"Bob Smith" <bob@example.com>
```

### To:

Required. The name and email address that should appear in the message's To: line. By default, the mail merge tag %%nameemail%% appears in this field, which will merge in each recipient's name and email address. To insert mail merge tags or conditional text, [create content](#) and import it into your mailing.

The To: field does not actually select the message's recipients. To specify the recipients, click on the [Mailings: New Mailing: Recipients](#) tab.

Examples of valid values for this field:

```
%%nameemail%%
"Jazztalk Announcements" <jazztalk@lm.example.com>
```

### Subject:

Required. The text which will appear in the message's Subject: line. To insert mail merge tags or conditional text, [create content](#) and import it into your mailing.

### Text message

The plain-text contents of this message.

Text copied and pasted from word processing programs such as Word may include extra characters, so it should be pasted into a plain-text editor first before being copied into the Text Message.

If your content also includes an HTML message, your message will be sent out with both text and HTML. This kind of message is called multipart-alternative format, and it ensures that recipients who can read HTML see only HTML, but those who can't see the plain text message.

To insert mail merge tags or conditional text, [create content](#) and import it into your mailing.

### **HTML message**

The HTML contents of your message. If you are using Windows Internet Explorer 5.5 or higher, you may use the [HTML editor](#).

If you are including images in your HTML, make sure that the path for your images is the absolute path (the complete URL), not the relative path. For example, your HTML editor might make the path for a image to be something like /img/product.jpg. These should be changed to the absolute path:

```
http://example.com/img/product.jpg
```

If your content also includes a text message, your message will be sent out with both text and HTML. This kind of message is called multipart-alternative format, and it ensures that recipients who can read HTML see only HTML, but those who can't will see the plain text message.

Keep in mind that not everyone can read HTML, so it's a good idea to always include a text message as well.

To insert mail merge tags or conditional text, [create content](#) and import it into your mailing.

### **Preview**

When clicked, [displays the message](#) in the ListManager interface for a random member, or for the address you enter.

### **Import Content**

Imports content into the mailing that has already been created in [Content](#).

### **Show More**

Click show more to increase by ten the number of lines visible in the message body.

### **Show Less**

Click show less to decrease by ten the number of lines visible in the message body.

### **Save**

Saves your mailing, and takes you to the [Mailings: Needs Approval](#) page

### **Save and Test**

Saves your mailing, and takes you to the [Mailings: Test Mailing](#) page.

**Important note for users of earlier versions of ListManager:** The list, site or server message wrapping will not be automatically included to your message if you create it through the ListManager administrator GUI unless it is enabled in Utilities: List Settings: Web Created Content. Please remember to add these instructions to your content or mailing, or send the message to the list via email. See [Content: Insert Field: Unsubscribe](#) to see how to do so quickly and easily.

## **Mailings: New Mailing: Import Content**

---

The Import Content page shows you all available content to be imported into a mailing, sorted by content name. To view Content selections, in the left Navigation bar, click **Content**, and then click **New Content**.

### **Importing Content**

Twenty content units for the list are displayed, sorted by Content Name. To view more, click show more. Repeatedly clicking show more will show greater numbers of content units at a time.

Click the "select" link to the left of the Content Name to import it into the mailing. Click "cancel" to return to the New Mailing window without importing any content.

#### **Content Name**

Displays the content name entered when the content was created. For details on this, see [Content: New Content: Essentials](#).

#### **Description**

Displays the content description entered when the content was created. For details on this, see [Content: New Content: Essentials](#).

## **Mailings: New Mailing: Recipients**

---

By default, your mailing will be sent to your entire list. The Mailings: New Mailing: Recipients page allows you to specify segments, lists, the number of recipients to be sent to, and recipients to be purged. For a step-by-step guide to creating mailings, see [Mailings: New Mailing](#).

These features are a part of ListManager Pro or Enterprise, and are unavailable for standard ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Pro or Enterprise.

## Segments

The default segment the mailing will be delivered to may be specified in [Utilities: List Settings: Basic Information: Enable Features: Default Segment](#).

Unless a different segment has been specified, your mailing will be sent to the entire list you're currently logged into. To change the list or segment, click the choose segments button. You will be taken to a page that will display the segments and lists available to you. Select from the left box the segments or lists you'd like to send to, and click the > button. To remove segments or lists, select them from the right box and click the < button.

Once a mailing has been saved, the segment it will send to may not be edited.

If you select multiple lists or segments to send to, a separate mailing will be created for each. You will be able to approve or schedule all of them to be sent at the same time.

Note: When sending to multiple segments, be sure that [Utilities: List Settings: Discussion Group Features: Message Rejection Rules: Allow Duplicate Postings](#) is set to "No" (the default setting). If set to "Yes," duplicate postings may be sent when sending to multiple segments, even if the Cross-Posting and Duplicates setting is set to "Make sure that multiple copies of cross-postings are removed".

If your list is not configured to allow you to merge, you will see the enable merge feature button. Clicking on this button takes you directly to [Utilities: List Settings: Basic Information: Enable Features](#). Change Save Messages to Enable Merge Mailings to Yes, and save. Also check [Utilities: List Settings: Automatic Maintenance: Purging Archives](#) to make sure archives are being saved for a sufficient period of time. You will then be able to purge recipients in future mailings.

Note that if you are creating a triggered mailing, the segment name will not be editable from here, and you must specify the segment on the [Trigger](#) tab.

Use the Back button on your browser or the **OK** button to return to the Mailings: New Mailing: Recipients page after changing your list settings.

## Purge From

ListManager allows you to remove or purge recipients who were sent previous messages. For example, let's say you want to test the effectiveness of your message by sending it to half of your list. Later, you'd like to send a message to the list members who were not included in the first mailing. You can purge the recipients of the previous message, so your members only receive one message from you. **NOTE** Recipients are purged even if they were sent the initial mailing but did not actually receive it.

By default, you send to all recipients in the list or subset. To purge recipients of other messages, click the **Choose Mailings** button. You will be taken to a page that will display the mailings available to you. Select from the left box the mailings whose recipients should NOT receive this message, and click the > button. To remove mailings, select them from the right box and click the < button.

If your list is not configured to allow you to purge recipients, you will see the enable purge feature button. Clicking on this button takes you directly to [Utilities: List Settings: Basic Information: Enable Features](#). Change Save Recipient Info to Enable Purge Mailings to Yes, and Save Messages to Enable Merge Mailings to Yes, and save. Also check [Utilities: List Settings: Automatic Maintenance: Purging Archives](#) to make sure archives are being saved for a sufficient period of time. You will then be able to purge recipients in future mailings.

Use the Back button on your browser or the **OK** button to return to the Mailings: New Mailing: Recipients page after changing your list settings.

\*\* Upgrade note: In ListManager 7.8, the merging/purging logic was changed in order to make the process faster, more efficient, and more robust. When upgrading to later versions, you will not be able to purge against mailings older than the date set in your outmail. You will not be able to purge against records that weren't in the outmail queue before the upgrade.

Once a mailing has been saved, you may not select messages to purge it against.

## Suppression List

ListManager can suppress, or exclude, a list of email addresses from receiving this particular mailing.

To suppress a list of email addresses, click choose file. You will be taken to the Mailings: Choose Suppression List page, where you may specify the suppression list file.

The file must be plain-text, with one email address per line. Example:

```
joe@example.com  
jane@example.net
```

Terminate Import sets the number of consecutive invalid email addresses to end the suppression list import process. For instance, you may want to terminate the suppression list import after 10 invalid email addresses, and check your formatting to see why so many addresses are failing. You can also set it to "Do not terminate import due to malformed addresses" if you'd like to ignore any bad addresses and process the import as-is.

Only one suppression list may be loaded at a time.

## Recency Limit

ListManager allows you to exclude those who have received mail recently from receiving the current mailing.

Setting a recency limit for this mailing allows you to prevent recipients from receiving this email if they have received the amount of mail you specify here from any list on the server. In other words, mailings from any list "count" towards the tally of mailings to a particular address.

For example, if joe@example.com received four messages in the past week from list\_a, and you set a recency limit for a mailing on list\_b to purge recipients who have received more than three mailings in the past seven days, joe@example.com will not receive the

mailing to list\_b, even though the messages joe@example.com received were from a different list.

By default, this setting will use the list Recency Limit, configured in [Utilities: List Settings: Basic Information: Enable Features](#). You may override these settings on a per-mailing basis using this setting.

To specify a recency limit, click edit recency. You will be taken to the [Mailings: Choose Recency to Purge By](#) screen.

### **Sample size**

This setting sets the maximum number of recipients to be sent this mailing. The default, blank, sends to all recipients.

If a number less than the total number of possible recipients is entered here, those recipients will be selected from the list of potential recipients. If multiple lists or subsets are selected, the maximum number of recipients will be selected from *each* list or subset. For example, if you set this number to be 10, and you select three lists to send to, there will be thirty recipients of the message, ten from each list.

ListManager will pick a random point at which to start pulling email addresses. For example, if you select a sample size of ten, ListManager will pick randomly where in the list of email addresses to begin the sample, and then select the next ten email addresses for the list or segment by member ID.

This feature is helpful if you'd like to send out a test message to gauge its effectiveness to a limited number of your list members. You can then purge the recipients of that message when you send it out to the entire list.

Alternatively, you may find that responses to your mailing overwhelms your company's resources to respond to say, a discount offer. Sending to a part of your list allows you to respond to just part of your membership at a time.

### **Synchronize List Prior to Mailing**

You may synchronize ListManager's database with your external data source before sending this mailing. When set to "no" (default), ListManager will not attempt to synchronize its data with your external data source. Set to "yes" to have ListManager automatically synchronize its data with your external data source at the next opportunity as scheduled in Utilities: Administration: Server: Server Settings: Scheduled Tasks.

Note: In order to use this feature, your server administrator must have created a [Database Connection](#), and you must have specified this connection in [Members: Synchronization Settings](#).

## **Mailings: Choose Segments**

---

This page displays the segments that are available to you. You may use the Ctrl key to select multiple segments at a time.

### **Choose Segments**



By default, your mailing will be sent to the entire list you're currently logged into. From the Choose Segments page, you can change this, and select to send the mailing to one or more segments or lists. Select from the left box the segments or lists you'd like to send to, and click the > button. To remove segments or lists, select them from the right box and click the < button. The mailing will be sent to all the segments or lists in the **Chosen Segments** field.

If you select multiple lists or segments to send to, a separate mailing will be created for each. You will be able to approve or schedule all of them to be sent at the same time.

Note that if you are creating a triggered mailing, the segment name will not be editable from here, and you must specify the segment on the [Trigger](#) tab.

Use the Back button on your browser or the **OK** button to return to the [Mailings: New Mailing: Recipients](#) page after changing your segment settings.

## Mailings: Choose Mailings to Purge From

---

This page displays the mailings that are available for you to purge from. You may use the Ctrl key to select multiple mailings at a time.

### Choose Mailings to Purge From

ListManager allows you to remove or purge recipients who have received previous messages. For example, let's say you want to test the effectiveness of your message by sending it to half of your list. Later, you'd like to send a message to the list members who haven't received the first message. You can purge the recipients of the previous message, so your members only receive one message from you.

Select from the left box the mailings whose recipients should NOT receive this message, and click the > button. To remove mailings, select them from the right box and click the < button. The mailings in the **Chosen Mailings to Purge From** in the right field, will not receive this mailing; they will be purged.

Click the **OK** button to return to the [Mailings: New Mailing: Recipients](#) page after changing your list settings.

## Mailings: Choose Recency to Purge By

---

ListManager allows you to exclude those who have received mail recently from receiving the current mailing.

Setting a recency limit for this mailing allows you to prevent recipients from receiving this email if they have received the amount of mail you specify here from any list on the server. In other words, mailings from any list "count" towards the tally of mailings to a particular address.

For example, if joe@example.com received four messages in the past week from list\_a, and you set a recency limit for a mailing on list\_b to purge recipients who have received

more than three mailings in the past seven days, joe@example.com will not receive the mailing to list\_b, even though the messages joe@example.com received were from a different list.

By default, this setting will use the list Recency Limit, configured in [Utilities: List Settings: Basic Information: Enable Features](#). You may override these settings on a per-mailing basis using this setting.

### **Purge email addresses who have received**

Specify whether to exclude those who have received *more than*, *fewer than* or *exactly* the number of email messages specified in *this number of mailings*.

### **this number of mailings**

Specify the number of mailings that will limit who will receive this mailing. Only mailings will be considered (email messages sent to the list or to subsets), not automated messages (e.g., welcome messages). Mailings from any list on the server will count towards this number.

### **in this past number of days**

Specify the number of days to check for the number of mailings specified.

When a recency limit is specified, ListManager will add an *X-LYRIS-Recency* header to the mailing that will limit who receives the mailing when actually sent. Example:

```
X-LYRIS-Recency: match=m,msgs=3,days=7
```

This sample header limits those who receive more (m) than 3 mailings in the past 7 days. Match options in the header are (f)ewer, (e)qual, or (m)ore than the number of mailings specified.

## **Mailings: New Mailing: Tracking**

---

This page allows you to track message opens and whether or not a user has the ability to read HTML mail. For a step-by-step guide to making mailings, see [Mailings: New Mailing](#).

ListManager is able to detect opens and HTML capability by inserting a 1x1 invisible gif in the HTML portion of your message. When a recipient opens the message, ListManager can register that they did so and that they have HTML capability. If a user can only read text, or if their email client or ISP prevents gif files from being retrieved automatically, you will not be able to detect opens for that user.

### **Track Opens**

Allows you to track what percentage of your messages were opened by recipients who can see HTML. Opens cannot be tracked for recipients who cannot see HTML; however, if a clickthrough is registered for a recipient for whom there has been no opens, an open is registered for that recipient.

If a user opens a message using two different clients (e.g., their email client and a web browser), two opens will be recorded.

If you send a text-only message, an HTML message will be created and added to your message. Your message will be sent as a multipart-alternative message, since opens cannot be tracked for text-only messages.

Track Opens may be enabled by default in [Utilities: List Settings: Basic Information: Enable Features](#).

### **Detect HTML Capability**

Allows you to track whether or not a recipient is able to read HTML. If the recipient can see HTML, the recipient's member record will be updated with that information.

If you send a text-only message, an HTML message will be created and added to your message. Your message will be sent as a multipart-alternative message, since HTML capability cannot be detected for text-only messages.

To see what proportion of your list has been detected to be able to read HTML, click view current totals. You will be taken to the [Reports: Members: Attribute Reports: HTML Capable](#) page, where you can see the number of members who have been HTML detected. Use the **Back** button on your browser to return to the Mailings: New Mailing: Tracking page.

Detect HTML Capability may be enabled by default in [Utilities: List Settings: Basic Information: Enable Features](#).

### **Track all URLs**

To make all URLs in the mailing clickthrough tracking URLs, choose **Yes**. The default setting for this option is found on the [Utilities: List Settings: Web Created Content](#) page.

### **Campaign**

Allows you to assign the mailing to one or more campaigns you have created previously in [Mailings: Campaigns](#). See [Mailings: Campaigns](#) for more information about campaigns.

## **EmailAdvisor Service**

---

If you subscribe to [EmailAdvisor](#), you may opt to audit your mailing. You may additionally opt to use the EmailAdvisor service when [testing your mailing](#).

### **Blacklist Monitor**

Blacklist Monitor checks the all the domains and IP addresses in your message, including those contained in your message content, and sees if any of them are listed in any of over 300 Internet blacklists.

### **Inbox Snapshot**

Inbox Snapshot captures what your message looks like in more than forty email clients. It shows you what the message looks like both in the preview and main message

panes, with and without images. Inbox Snapshot also includes a spell check, HTML validator and link validator to ensure that your message looks right.

### **Delivery Monitor and Content Analyzer**

Delivery Monitor checks if the message has been received at more than forty ISPs and email providers, and if so, whether it reached the main mailbox or the bulk folder. It can also show if there have been changes in deliverability during the course of your campaign. Content Analyzer tests your campaign against thirty spam filters, and shows you what elements of your message make it prone to be filtered as spam.

Select which Delivery Monitor and Content Analyzer audits to run from the drop-down list.

### **Reports Sent To**

The email address EmailAdvisor reports will be sent to.

## **Mailings: New Mailing: Deliverability**

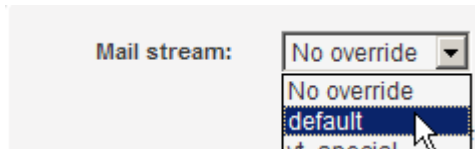
---

If you subscribe to [EmailAdvisor](#), you may opt to audit your mailing. You may additionally opt to use the EmailAdvisor service when [testing your mailing](#).

### **Mail stream**

#### **To select a mail stream**

Click the **Mail stream** drop-down list, and then choose the mail stream you want.



**NOTE** The first option, **No override, means** "use the mail stream you chose for (in order of priority) the segment or the list."

[Mail streams overview](#)

[Create a new mail stream](#)

### **Blacklist Monitor**

Blacklist Monitor checks the all the domains and IP addresses in your message, including those contained in your message content, and sees if any of them are listed in any of over 300 Internet blacklists.

### **Inbox Snapshot**

Inbox Snapshot captures what your message looks like in more than forty email clients. It shows you what the message looks like both in the preview and main message panes, with and without images. Inbox Snapshot also includes a spell check, HTML validator and link validator to ensure that your message looks right.

## Delivery Monitor and Content Analyzer

Delivery Monitor checks if the message has been received at more than forty ISPs and email providers, and if so, whether it reached the main mailbox or the bulk folder. It can also show if there have been changes in deliverability during the course of your campaign. Content Analyzer tests your campaign against thirty spam filters, and shows you what elements of your message make it prone to be filtered as spam.

Select which Delivery Monitor and Content Analyzer audits to run from the drop-down list.

## Reports Sent To

The email address EmailAdvisor reports will be sent to.

# Mailings: New Mailing: Schedule

---

This page allows you to schedule when your mailing should be sent, and to rewrite the date and time sent to be the time when actually sent. You may also schedule your mailing to be resent. For a step-by-step guide to making mailings, see [Mailings: New Mailing](#).

## Send When

By default, your mailing will be sent when you [approve](#) it. If you'd like to schedule it to be sent at a particular date and time, enter it here in one of the following formats:

YYYY-MM-DD HH:MM:SS  
MM/DD/YY  
YYYY-MM-DD

Or, click the calendar to select a date.

You must specify a date; otherwise, the date will be set to be 1900/01/01, and the message will be sent immediately.

## Rewrite Date When Sent

By default, the date on your mailing will be the date and time it is actually sent. If you'd like it to be the date the mailing was created, select **No** here.

## Resend After This Many Days

By default, your mailing will be sent only once. If you'd like it to be resent periodically, enter the number of days before it should be resent.

This feature is useful if you are sending a message to a segment which is constantly changing (e.g., all members who joined exactly one month ago today). It's also useful if you're sending the same message but with conditional content that always changes (e.g., a list of overdue books).

Discussion lists which send out an FAQ about the list periodically to remind members about the list's rules can also use this feature.

### **Don't Attempt After Date**

Allows you to set a final cutoff date for sending the mailing. This setting will override the "resend after this many days" setting, and is intended to put an endcap on mailings sent. If there are any transient failures in the mailing, ListManager will only attempt retries up to and including this date. This can be useful, for instance, if a marketing campaign has a coupon which expires on a given date, and the content of the mailing would no longer be valid after a certain date. Enter the date in YYYY-MM-DD format.

## **Mailings: New Mailing: Internationalization**

---

Creating a mailing in an alternate character set requires that you have that character set installed on your system and that you have a means of editing or entering your message in that character set. Your web browser may be capable of converting Unicode to whatever character set you have selected for the mailing but you must be sure that there weren't any characters entered that don't exist in the specified character set. Otherwise they will show up incorrectly.

Note: once a mailing is saved, it is converted to its encoded form and cannot be viewed in the correct character set. The Inmail and Outmail queues do not display messages using the correct character set. This is because the messages are displayed in their raw form and may be encoded.

### **Character Set**

Before you enter a mailing into the web interface you must select the character set that you want to use for this mailing. If the character set you want to use does not exist in the drop-down listbox, your server administrator can add it in the [Utilities: Administration: Server: Internationalization and Localization: International Character Sets](#) page.

### **Text and HTML Sections Encoding**

The default setting for **Text section encoding** and **HTML section encoding** is **quoted-printable**. The encoding options can be left alone, in general. If you are pasting in text that you know is already encoded differently, you can choose that encoding and select **already-encoded** for that section.

After selecting the character set for your mailing, you can now enter in your text. When you select any other tab in the editor, the web browser will be set to use the character set that you defined. This is required to avoid character set conversions that are done by the web browser. These generally result in the loss of characters that aren't in the browser's character set.

Note that if the character set of the mailing you are creating doesn't contain characters that your web interface requires, the web interface may display some wrong characters while you are in the mailing editor. For example, if your web interface is in French and you are composing a message in Japanese, some special accented characters in the

web interface may show up incorrectly. When you leave the mailing editor, the web interface will return to normal. This is due to the fact that the web browser cannot display text in two different character sets at the same time. The exception is Unicode, which is currently not supported for content editing.

You can use international characters in the From, To, and Subject fields but it isn't recommended. Email clients might not display these fields correctly because the character set of those fields may not be available in the message overview. Also, they must be specially encoded and not all mail clients are able to decode encoded header lines.

The Name and Description should contain only standard ASCII characters since these fields are displayed in parts of the web interface that may not be displayed in the same character set.

If you are pasting in text or HTML that includes extended characters you should determine whether or not the text you are pasting is actually in that character set. If you are pasting from a plain text or plain HTML document, the character set may not be visible in the editor you are copying from. If you paste them into the mailing editor, they may not show up correctly after you save your message. That is because the character set that you pasted in was incompatible with the one defined for the mailing. You can work around this problem by entering the text before setting the character set in the Internationalization tab. Once your text is entered, you can change the character set and the content body fields will then be displayed with the correct characters.

## Approval

### Mailings: Approval: Need Approval

---

The Mailings: Approval menu is divided into three subsections designed to view and approve mailings:

- Need Approval
- Approval Wizard
- Approval Summary

#### Need Approval

---

The Mailings: Approval: Need Approval page shows you all mailings which are pending your approval to be sent.

#### Finding a Mailing

Twenty mailings for the list are displayed in Mailings: Need Approval. To view more, click show more. Repeatedly clicking show more will show greater numbers of mailings at a time.

You may change the sorting order of the mailings by clicking the up or down triangles next to ID, Title, or Subject. By clicking the top triangle, the sort order will be ascending

(a-z); clicking the bottom arrow makes the sort order descending (z-a). Click next to see the next twenty mailings, previous to see the last twenty.

To search this table, click . To export this table as a CSV file, click .

### **Viewing or Editing a Mailing**

To view a mailing, click on the mailing title. You will be taken to the [Mailings: Need Approval: Edit Mailing](#) screen, where you can view the mailing, edit it, or save and test it.

### **Sending a Mailing**

To send a mailing, click send now next to the mailing. Your message will be approved, and sent out immediately.

If you have multiple mailings with the same name and title, you will also have the option to send all of these mailings to be sent at the same time. Multiple mailings like this are created when you send a single message to multiple subsets or lists.

### **Testing a Mailing**

Click Save and test, or Test next to a mailing. You will be taken to the [Mailings: Test Mailing](#) page.

### **Scheduling a Mailing**

To schedule a mailing to be sent at a future time, click on **Schedule** next to the mailing. The Title, Subject, and Schedule Send Date will be displayed. To schedule the date and time the message should be sent out, enter the date and time in Schedule Send Date.

If you have multiple mailings with the same name and title, you will also have the option to schedule all of these mailings to be sent at the same time. Multiple mailings such as these are created when you send a single message to multiple subsets or lists.

### **Copying a Mailing**

Click Copy next to the mailing you'd like to copy. ListManager will show you the old title, and will ask you the new title you'd like. You might want to copy a mailing if you'd like to send it again at a future date.

### **Deleting a Mailing**

Click Delete next to the mailing you'd like to delete. ListManager will ask you if you're sure before deleting the mailing.

To send the sender a message why the mailing was rejected, select the mailing and click **Delete with Feedback**. You will be taken to the Delete with Feedback page, which allows you to tailor your response to each rejected mailing sender.

If you have multiple mailings with the same name and title, you will also have the option to delete all of these mailings at the same time. Multiple mailings like this are created when you send a single message to multiple subsets or lists.

### **Creating a Mailing**

Click create new mailing to go to [Mailings: New Mailing](#).



## Approval Wizard

---

Approve or reject mailings quickly by using the Mailings: Approval: Approval Wizard (available from the Mailings: Approval menu page).

If you are approving (moderating) a discussion list (where members submit mailings to the list), the Approval Wizard helps you work quickly as you approve and delete mailings in the order in which they were submitted. You also have the option of deleting mailings with feedback so contributors know why their mailing was rejected.

If you are sending messages with international character sets, they cannot be approved using the Approval Wizard; they can only be approved from the Homepage. See [Mailings: Need Approval: Edit Mailing: Message Body](#) for details on this.

If you have several lists, the Approval Wizard also gives you an overview of your other lists to approve once you have completed approving messages for the list you're logged into.

## Approval Summary

---

The Approval Summary shows you all the lists you have messages pending approval. You may click Overview to change lists and see the messages pending approval for that particular list. Or, click Approval Wizard next to the list to be taken directly to the Approval wizard for that list. The Approval Summary page may be book marked for easy reference.

# Mailings: Approval: Need Approval: Edit Mailing: Message Body

---

The Mailings: Need Approval: Edit Mailing pages are identical to the Mailings: Scheduled: Edit Mailing pages.

### From

Whom the mailing is from. This information is included here to assist you in approving or rejecting mailings. The From: line may be changed in [Mailings: Need Approval: Edit Mailing: Message Header](#).

### Subject

The mailing's subject line. This information is included here to assist you in approving or rejecting mailings. The Subject: line may be changed in [Mailings: Need Approval: Edit Mailing: Message Header](#).

### Date

The date the mailing was sent. This information is included here to assist you in approving or rejecting mailings. The Date: line may be changed in [Mailings: Need Approval: Edit Mailing: Message Header](#).

## Body

The body of the mailing you're sending. The body is separated into text and HTML bodies, and does not display the boundary information. To edit the entire message (including the MIME boundaries), click edit source.

**Note on Messages with International Character sets:** If you are sending a message over the web which contains foreign or international character sets, please note that these CANNOT be edited while running the approval wizard, because the character sets may be incompatible. This can distort the message if it is a MIME encoded message. Any attempt to open, view, or use the Approval Wizard in the web interface will distort the message.

If you need to approve a message with international character sets, it can be done without any distortion by doing so from the "Home" tab and going to the [Homepage](#), and clicking *send now* from the "Mailings Needing Approval" table there. This does not open the message, and therefore does not distort it or change it.

## Show More

Click show more to increase by ten the number of lines visible in the message body.

## Show Less

Click show less to decrease by ten the number of lines visible in the message body.

## Send Now

Approve this mailing, and send it immediately.

## Delete Now

Delete this mailing. Once deleted, a mailing cannot be sent to the list without recreating it.

## Delete With Feedback

Delete the mailing, but send the message's author a message explaining why it has been rejected.

## Edit Source

Edit the entire email message body, including message boundaries. Once you have edited the source, the message will no longer appear divided into text and HTML message bodies, and you will always see the entire message, including message boundaries.

If you've created both a text and HTML body for your message, you'll see some encoding that allows email clients to select which version they can open and read. It will start like this:

```
This is a multi-part message in MIME format.
```

```
-----  
Content-Type: text/plain; charset="iso-8859-1"
```

Content-Transfer-Encoding: 7bit

Be careful if you edit the source! If you change the encoding, it may prevent the message from being viewed properly. [Test](#) your mailing before sending it out if you make any changes.

### **Save**

Save this mailing, but do not send it out.

### **Save and Test**

Save this mailing, and test it.

### **Cancel**

Cancel any changes made to this mailing, and return to the main menu.

## **Mailings: Approval: Need Approval: Edit Mailing: Message Header**

---

The Mailings: Approval: Need Approval: Edit Mailing pages are identical to the Mailings: Scheduled: Edit Mailing pages.

### **Mailing Name**

The title you've given this mailing. This title is not seen by message recipients.

### **Header**

The message header will be displayed here. Parts of the header will appear as mail merge tags. The information appropriate for each recipient will be merged in when the mailing is sent.

If you change the header, you may prevent the mailing from being sent properly. It is recommended you [test](#) your mailing before sending it.

### **Send Now**

Approve this mailing, and send it immediately.

### **Delete Now**

Delete this mailing. Once deleted, a mailing cannot be sent to the list without recreating it.

### **Delete with Feedback**

Delete the mailing, but send the message's author a message explaining why it has been rejected.

**Save**

Save this mailing, but do not send it out.

**Save and Test**

Save this mailing, and test it.

**Cancel**

Cancel any changes made to this mailing, and return to the main menu.

## **Mailings: Approval: Need Approval: Edit Mailing: Recipients**

---

The Mailings: Need Approval: Edit Mailing pages are identical to the Mailings: Scheduled: Edit Mailing pages.

**Number of Recipients to Send To**

If blank, all the recipients in the selected lists and subsets will be sent to. To send to a limited number of recipients (for a sample, for example), enter a number here.

If you've already selected the number of recipients to be sent to when creating your mailing, that number will be shown here.

**Segment**

Displays the segments or lists to be sent to. For informational purposes only; to send to a different list or subset, create a new mailing.

**Purge From**

Displays the mailings whose recipients should not receive this message. For informational purposes only; to purge different recipients or none at all, create a new mailing.

**Suppression List**

ListManager can suppress, or exclude, a list of email addresses from receiving this particular mailing.

To suppress a list of email addresses, click choose file. You will be taken to the Mailings: Choose Suppression List page, where you may specify the suppression list file.

The file must be plain-text, with one email address per line. Example:

```
joe@example.com  
jane@example.net
```

Terminate Import sets the number of consecutive invalid email addresses to end the suppression list import process. For instance, you may want to terminate the suppression list import after 10 invalid email addresses, and check your formatting to see why so many addresses are failing. You can also set it to "Do not terminate import due to malformed addresses" if you'd like to ignore any bad addresses and process the import as-is.

Only one suppression list may be loaded at a time. If you would like to load multiple lists,

### **Recency Limit**

Displays which members will not receive this message based on the number of messages they have received in the number of days specified. For informational purposes only; to create a different recency limit, create a new mailing and specify a different [Recency Limit](#) on the **Recipientstab**.

### **Synchronize List Prior to Mailing**

You may synchronize ListManager's database with your external data source before sending this mailing. When set to "no" (default), ListManager will not attempt to synchronize its data with your external data source. Set to "yes" to have ListManager automatically synchronize its data with your external data source at the next opportunity as scheduled in Utilities: Administration: Server: Server Settings: Scheduled Tasks. Note: In order to use this feature, your server administrator must have created a [Database Connection](#), and you must have specified this connection in [Members: Synchronization Settings](#).

### **Send Now**

Approve this mailing, and send it immediately.

### **Delete Now**

Delete this mailing. Once deleted, a mailing cannot be sent to the list without recreating it.

### **Delete with Feedback**

Delete the mailing, but send the message's author a message explaining why it has been rejected.

### **Save**

Save this mailing, but do not send it out.

### **Save and Test**

Save this mailing, and test it.

### **Cancel**

Cancel any changes made to this mailing, and return to the main menu.

# Mailings: Approval: Need Approval: Edit Mailing: Schedule

---

This page allows you to schedule when your mailing should be sent, and to rewrite the date and time sent to be the time when actually sent. You may also schedule your mailing to be resent.

The Mailings: Need Approval: Edit Mailing pages are identical to the Mailings: Scheduled: Edit Mailing pages.

## Scheduled send date

By default, your mailing will be sent when you [approve](#) it. If you'd like to schedule it to be sent at a particular date and time, enter it here in one of the following formats:

YYYY-MM-DD HH:MM:SS  
MM/DD/YY  
YYYY-MM-DD

Or, click the calendar to select a date.

You must specify a date; otherwise, the date will be set to be 1900/01/01, and the message will be sent immediately.

## Rewrite date when sent

By default, the date on your mailing will be the date and time it is actually sent. If you'd like it to be the date the mailing was created, select No here.

## Resend after this many days

By default, your mailing will be sent only once. If you'd like it to be resent periodically, enter the number of days here.

This feature is useful if you are sending a message to a segment which is constantly changing (e.g., all members who joined exactly one month ago today). It's also useful if you're sending the same message but with conditional content that always changes (e.g., a list of overdue books).

Discussion lists can also periodically send out a FAQ about the list to remind members about the list's rules.

## Don't Attempt After Date

Allows you to set a final cutoff date for sending the mailing. This setting will override the "resend after this many days" setting, and is intended to put an endcap on mailings sent. This can be useful, for instance, if a marketing campaign has a coupon which expires on a given date, and the content of the mailing would no longer be valid after a certain date. Enter the date in YYYY-MM-DD format.

## Send Now

Approve this mailing, and send it immediately.

### **Delete Now**

Delete this mailing. Once deleted, a mailing cannot be sent to the list without recreating it.

### **Delete with Feedback**

Delete the mailing, but send the message's author a message explaining why it has been rejected.

### **Save**

Save this mailing, but do not send it out.

### **Save and Test**

Save this mailing, and test it.

### **Cancel**

Cancel any changes made to this mailing, and return to the main menu.

## **Mailing Status**

### **Mailings: Mailing Status: All Outgoing Mailings by Date**

---

The Mailings: All Outgoing Mailings by Date page shows you all mailings being sent or which have already been sent, sorted by date and time

#### **Filtering the Mailings Table**

You can restrict the mailings displayed to a particular mailing type or list and a particular date range.

#### **To restrict the table to a particular mailing type**

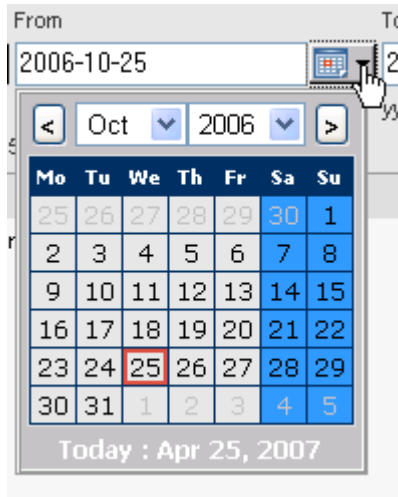
Click the box under **Mailing type** and then choose the type you want.

#### **To restrict the table to a particular list**

Click the box under **List(s)** and then choose the list you want.

#### **To restrict the table to a particular date range**

Click the arrow buttons in the **From** and **To** boxes, and then in the mini-calenders that appear, choose your start and end dates.



## Finding a Mailing

Twenty mailings for the list are displayed in Mailings: All Outgoing Mailings by Date. To view more, click show more. Repeatedly clicking show more will show greater numbers of mailings at a time.

## To change the sorting order in a column

Click the up/down triangle next to the column name.

Top arrow: the sort order is ascending (a-z).

Bottom arrow: the sort order is descending (z-a).

The sort options are:

### **ID**

The ID ListManager has assigned this mailing.

### **Date**

The date when this mailing was sent.

### **Mailing Name**

The title you gave this mailing.

### **Subject**

The subject of this mailing.

### **Recips**

The total number of recipients to be sent this mailing when the mailing was originally queued.

Note: When using the EmailAdvisor service for a test, the test mailing will initially show that the message is being sent to a larger number of recipients than you specified. As the test progresses, the size of the mailing will match the Test Sample Size you have specified.

### **Sent**

The percentage of these recipients who have definitely been sent this mailing, or who have definitely failed.



To search this table, click . To export this table as a CSV file, click .

## Viewing or Editing a Mailing

### To view a mailing

Click the **ID** for the mailing.

You will be taken to the [Mailings: Outgoing Mailings: Edit Mailing](#) screen, where you can view the mailing, edit it, or save it.

Click overview next to a mailing to be taken to the Mailing Overview report. This report will show you the vital statistics for this mailing, such as recipient counts, clickthrough statistics, and membership changes.

### Creating a Mailing

Click create new mailing to be taken to [Mailings: New Mailing](#)

## Mailings: View Outgoing Mailing: Mail Queue

---

### ID

The ID number ListManager has assigned this mailing.

### Status

The status of this mailing (this is not to be confused with the recipient mailing status). Recipient mailing statuses can be seen on the [Mailings: View Outgoing Mailing: Mailing Recipients](#) page.

### Active

These are mailings that are either new or in retry mode, which are currently being delivered. When a mailing is active, it can be paused by clicking the **Pause** button, which will put the mailing in Paused mode.

### Paused

Mailings that have been manually paused (while active). Once a mailing is paused, it can then be resumed by clicking the *resume mailing* button. ListManager will take you to a confirmation page, asking if you are sure that you want resume the mailing.

The mailing can be stopped completely by clicking the *stop mailing* button. Once a mailing is stopped, it cannot be resent. Stopping a mailing deletes recipients who have not yet been attempted. Of these, recipients which have experienced transient failures, can either be deleted, marked as a success, or marked as a failure. Deleting a recipient ensures that their attempts have no effect on reports or bounce counts (as if they were never attempted). A success would be useful for a mailing that has been in retry mode for only a short time (i.e. several hours), and the majority of remaining recipients would most likely succeed. A failure would be useful for a mailing that has been in retry mode for a long time (i.e. several days), and it does not look like the remaining recipients will succeed.

### Completed

All attempts have been made for the mailing, and no further retries will occur.

**Pausing (x) Recipients Have Been Paused, (x) Recipients are Currently Sending**

This is a temporary status which occurs when a user first pauses a mailing. While it is pausing, this will be the status displayed, showing the number of recipients which have been paused, and those which are currently sending (on their way to being paused).

**List Name**

The name of the list this message was sent to.

**Date Created**

The date this mailing was created.

**Don't attempt after**

The date, in YYYY:MM:DD format, on which no further attempts should be made for this mailing. Any transient failures will be retried only up to and including this date. This is like an "expiration date" for the mailing. This can be very important in the case of mailings with expiring coupons or information about current events.

**Deleting Mailings**

A mailing can only be deleted when it has been completed. The **Delete** button will not be available until this occurs.

## Mailings: Mailing Status: Currently Active Mailings

---

The Mailings: Currently Active Mailings page shows you all mailings currently being sent or which are scheduled to be retried at a future date.

**Finding a Mailing**

Twenty mailings for the list are displayed in Mailings: Currently Active Mailings. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of mailings at a time.

You may change the sorting order of the mailings by clicking the up or down triangles next to ID, Date Created, Name, Recips, Sent, or Status. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click nextto see the next twenty mailings, previous to see the last twenty.

The sort options are:

**ID**

The ID ListManager has assigned this mailing.

**Date**

The date on which the mailing was originally created.

#### **Mailing Name**

The name you gave this mailing.

#### **Recips**

The number of recipients to be sent this mailing.

Note: When using the EmailAdvisor service for a test, the test mailing will initially show that the message is being sent to a larger number of recipients than you specified. As the test progresses, the size of the mailing will match the Test Sample Size you have specified.

#### **Remaining**

The number of recipients remaining, who have not yet received the message.

### **Viewing or Editing a Mailing**

To view a mailing, click on the mailing name. You will be taken to the [Mailings: Outgoing Mailings: Edit Mailing](#) screen, where you can view the mailing, edit it, or save it.

### **Creating a Mailing**

Click create new mailing to be taken to [Mailings: New Mailing](#)

### **Download as a File**

Click on the disk icon to download your messages in CSV format.

## **Mailings: Mailing Status: Completed Mailings from Past Week**

---

The Mailings: Completed Mailings page shows you all mailings which were created and approved for mailing in the last week (7 days).

### **Finding a Mailing**

Twenty mailings for the list are displayed in Mailings: Completed Mailings from Past Week. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of mailings at a time.

You may change the sorting order of the mailings by clicking the up or down triangles next to ID, Date Created, Mailing Name, Recips, or Success. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click Next to see the next twenty mailings, previous to see the last twenty.

The sort options are:

#### **ID**

The ID ListManager has assigned this mailing.

**Date**

The date and time when this mailing was created.

**Mailing Name**

The name you gave this mailing.

**Recips**

The number of recipients to be sent this mailing.

**Success**

The percentage success rate for the mailing. If it is 100%, that means every message sent within this mailing was successful.

**Viewing or Editing a Mailing**

To view a mailing, click on the mailing title. You will be taken to the [Mailings: Outgoing Mailings: Edit Mailing](#) screen, where you can view the mailing, edit it, or save it.

**Creating a Mailing**

Click create new mailing to be taken to [Mailings: New Mailing](#)

**Download as a File**

Click on the disk icon to download your mailings in CSV format.

## Mail Queues

### Mailings: Mailing Status: Mail Queues

---

The mail queues allow you to view all mail coming in and out of your ListManager server. If you're wondering what mail you're receiving, or what kinds of messages ListManager is sending other than your mailings, view the mail queues. Viewing these queues can be helpful for troubleshooting purposes.

The length of time mail is held in the Incoming and Outgoing mail queues is dependent on how long you've set the server to save old data. See [Utilities: Administration: Server: Server Settings: Automatic Maintenance: Purging Old Data](#) for more information.

### Mailings: Mailing Status: Mail Queues: Incoming

---

The Incoming Mail Queue is a table of all the email coming into your server or created through the interface to be distributed.

**Finding an Incoming Message**

Twenty messages are shown at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of messages at a time.

You may change the sorting order of the messages by clicking the up or down triangles next to Date, From, To, or List. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click next to see the next twenty messages, previous to see the last twenty.

**Date**

The date and time the message was received.

**From**

Who the message was addressed From:.

**To**



Who the message was addressed To:.

**List**

The list or list and segment the message is addressed to, if applicable.

**Subject**

The Subject: line of the message.

To search this table, click . To export this table as a CSV file, click .

**Display Options**

By default, incoming mail for the current list is displayed. To change the list or to view incoming mail for all lists, select the list from the List drop down box. To view messages of a particular status, select the status from the Status box. The possible status options are:

**All**

All incoming messages for this list or all your lists.

**Done**

ListManager has completed processing for these messages.

**Failed**

Messages that could not be processed, and which have not yet been acknowledged.

**Failed-Acknowledged**

Messages that could not be processed, and have been acknowledged by an administrator.

**New**

Messages that have been received but not yet processed.

**Retry**

If there was an error processing this message, ListManager will attempt to retry this message.

**Working**

ListManager is processing this message.

**Unprocessed**

All messages that are currently unprocessed. These messages may have a status of New, Failed, Retry or Working.

**Viewing an Incoming Message**

To view an incoming message, click on the date or "view" next to the mailing you'd like to view. You will be taken to the [Utilities: Mail Queues: Incoming: View Message](#) page, where you can view the message.

**Deleting a Message**

Click **Delete** next to the message you'd like to delete. ListManager will ask you if you're sure before deleting the message.

## Mailings: Mailing Status: Mail Queues: Incoming: View Message

---

**From**

The email address the message is From:.

**To**

The email address or mail merge tag the message is To:.

**Subject**

The Subject: of the message.

**List Name**

The name of the list or list and segment the message was sent to.

**Body**

The body of the message.

**Status**

The status of the message:

**New**

The message has just started, and is being processed.

**Pending**

The message is currently being processed.

**Done**

The message has been processed.

**Type**

The type of message this is, such as a subscription request or an admin send.

**Date Created**

The date this message was created.

**Don't Attempt After**

The final date that the mailing will be sent; puts an endcap to when the mailing can be sent by ListManager.

**Message ID**

The incoming ID number ListManager assigned this message when it was received.

**Node name**

The node that processed this message.

**Computer Name**

The name of the computer which received this message.

**Sent by Email**

Whether or not the message was sent by email, or sent using the ListManager web interface.

**All Headers**

All the headers for this message.

**Max Recipients**

The maximum number of recipients for this message.

**Priority**

The priority of this message, one being the highest.

**Purge Message**

Which mailings' recipients will be purged from receiving this mailing.

**Subset ID**

If sent to a subset, the ID number of the subset.

**Title**

The title of the mailing.

**Transact**

The time and steps ListManager took to process this message.

# Mailings: Mailing Status: Mail Queues: Outgoing

---

The Outgoing Mail Queue contains all the mail coming into your server.

## Finding an Outgoing Mailing or Message

There are some filtering and search tools to narrow the view of outgoing mailings. From the **List** drop-down menu, select the list that you would like to view mailings for. To view mailings for all lists, select the "all" option.

From the **Type** drop-down menu, select the type of outgoing mailing that you would like to view outgoing mailings for. This will show mailings for that type associated with the list selected above. Select **Any** to view mailings of all types (for the designated list), and **All mailings** to view outgoing messages for all the outgoing mailings of all types (for the designated list). The other options allow you to narrow the search and view only a particular type of message. The following options will *always* be available in this drop-down menu:

- Any
- All mailings
- Completed mailings
- Unsent mailings
- All messages
- Completed messages
- Unsent messages
- reject-message

The following options may appear in the drop-down menu, depending on whether or not these types of items exist in the outgoing queue. If there are no items of this type, they will not be available in the drop-down menu.

- admin-notify
- admin-warn
- delivery-report
- digest
- held
- index
- mdigest
- owner
- owner-mail
- owner-moderated-posting
- server-disabled

In the **Search** field, any word or words in the message may be searched for. This will include the body of the message, the header, the footer, and the subject line. Multiple words can be searched for by separating them with spaces. For instance, if you are looking for an outgoing mailing that you know contained the word "ski trip," you would enter:

```
ski trip
```



in the search field, and only outgoing mailings containing that word would be retrieved.

Twenty mailings (emails sent to the entire list) from the current list are shown at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of mailings at a time.

You may change the sorting order of the mailings by clicking the up or down triangles next to ID, Date, List, Mailing Name, Subject, or Type. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click next to see the next twenty messages, previous to see the last twenty.

**ID****Date**

The date and time the outgoing message or mailing was created.

**List**

The list the mailing or message is associated with, if applicable.

**Mailing Name**


Displays the title (name) of the mailing.

**Subject****Type**

Displays the type of email generated. For example, if it is a list, digest, or admin-notify type of job. The different types that may appear are:

- ◆ digest: a digest of list postings
- ◆ held: a held notification message
- ◆ admin-notify: a message sent to administrators notifying them of some error condition
- ◆ owner-moderated-posting: a message sent to list administrators who are set to receive moderation notifications. It indicates that a message is awaiting moderation.
- ◆ list: a normal list posting
- ◆ mdigest: a mime digest of list postings
- ◆ delivery-report: a delivery report of the status of a message sent (or sending)
- ◆ admin-warn: a warning message sent to administrators indicating that the server is disabled, or that they are reaching their member limit.
- ◆ owner-mail: a message sent to list administrators who are configured to receive admin mail. This message would be from someone sending specifically to the email address listname-owner@server.name.
- ◆ server-disabled: a message sent to the person posting to a list on a disabled server
- ◆ index: similar to a digest list of postings, but the bodies of the postings are not included in the message.


By default, all mailings for the current list are shown on this screen. Click on the drop-down box to select a particular list's outgoing mailings, or to view all outgoing messages (emails sent to individuals in response to particular requests) for the server.

To search this table, click .

## Viewing Outgoing Messages

To view details about messages, click on the date or "view" next to the mailing you'd like to view. Here you can view the message details, including the [message body](#), [message header](#), [recipients](#), [log](#), and [mail queue](#).

## Download as a File

To export this table as a CSV file, click .

# Advanced Mailings

## Mailings: Advanced Mailings: New Triggered Mailing

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Triggered mailings are a feature of ListManager Enterprise, and are unavailable for standard or Pro ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Enterprise.

Triggered mailings work on the premise that the time when the mailing is sent to a member depends on some action performed by that member, such as visiting a web page or making a purchase. It can also depend on some date associated with that member, such as their birthday or the date they joined the list.

Triggered mailings run on a regular frequency. This is usually once per day, but could be as often as once per hour, or as infrequently as every several weeks. The exact time of day when it runs is specified by you.

Each time the triggered mailing runs, it works the same way as any other mailing to a segment. It first calculates which members meet the criteria specified in the segment, and then sends them the mailing. What is special about triggered mailings is that they have a special type of segment called a [triggered segment](#), or trigger for short. A key part of a triggered segment is the trigger clause. This determines who should receive the mailing right now.

## Creating a Triggered Mailing

Creating a triggered mailing is much like creating a standard mailing, except that the "Schedule" tab is replaced by the "Trigger" tab. For details on the other tabs, please see:

- [Mailings: New Mailing: Message](#)
- [Mailings: New Mailing: Recipients](#) (the only difference here is that rather than choosing a segment, you will select a segment based on the desired trigger on the Trigger tab.)

- [Mailings: New Mailing: Tracking](#)
- [Mailings: New Mailing: Internationalization](#)

## Trigger Tab

The Trigger tab is where you select a trigger from the ones created in [Segments: New Triggered Segment](#), and define the times for the mailing to be sent. For details on how to use the Trigger tab, see [Mailings: Advanced Mailings: Trigger Tab](#).

# Mailings: Advanced Mailings: Triggered Mailings: New Triggered Mailing Wizard

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Triggered mailings are a feature of ListManager Enterprise, and are unavailable for standard or Pro ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Enterprise.

The Triggered Mailing wizard allows you to quickly create a triggered mailing in one step. It also references the trigger created in [Segments: New Triggered Segment](#), and combines all the tabs involved in creating a [new triggered mailing](#) into one page. The wizard takes the fundamentals of the Message, Recipients, Tracking, and Trigger tabs and puts them in one page for easy accessibility. Note that the wizard cannot be used to create mailings involving [Internationalization](#)- to do this, a new triggered mailing must be created. Also note that the list's recency limits may not be overridden when creating a new triggered mailing using this wizard. However, these limits may be edited later in Mailings: Advanced Mailings: Triggered Mailings: Edit Triggered Mailing.

## Name

Select a name to identify your triggered mailing. This name is not seen by message recipients, so label the mailing in a way that will help you to identify it later in the Mailings main page. 70 characters are allowed in the Name field.

## Trigger

Select the desired trigger (triggered segment) from the drop-down menu. In order for triggers to appear here they must first be created in Segments, by clicking on [create new triggered segment](#).

## Track Opens

Allows you to track what percentage of your messages were opened by recipients who can see HTML. Opens cannot be tracked for recipients who cannot see HTML.

If a user opens a message using two different clients (e.g., their email client and a web browser), two opens will be recorded, skewing your results.

If you send a text-only message, an HTML message will be created and added to your message. Your message will be sent as a multipart-alternative message, since opens cannot be tracked for text-only messages.

### **Detect HTML Capability**

Allows you to track whether or not a recipient is able to read HTML. If the recipient can see HTML, the recipient's member record will be updated with that information.

If you send a text-only message, an HTML message will be created and added to your message. Your message will be sent as a multipart-alternative message, since HTML capability cannot be detected for text-only messages.

### **Track all URLs**

To make all URLs in the mailing clickthrough tracking URLs, choose **Yes**. The default setting for this option is found on the [Utilities: List Settings: Web Created Content](#) page.

### **Time after the Trigger Event**

Select the number of hours/days/weeks/months/years before or after the trigger event the mailing should be sent. ListManager will see that the trigger event has occurred, and that the member(s) qualify to receive the mailing, but will not send the mailing immediately; rather it will delay it by the time specified here. For instance, if a member purchased an item on August 29th, 2003, you can then send the mailing 2 days after the purchase (the trigger event) rather than immediately upon the purchase. Then the setting would be "2 days afterwards". The "before" option is for future triggers that you may anticipate, such as a member birthday or join date anniversary. This would send the triggered mailing the set time prior to the upcoming event (i.e. birthday).

### **Content**

Select the desired Content to be included in the triggered mailing from the drop-down menu. In order for the Content to appear here, it must first be created in [Content: New Content](#).

Once you click "OK," you will be asked to confirm the triggered mailing.

## **Mailings: Advanced Mailings: Triggered Mailings: View Triggered Mailings**

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Triggered mailings are a feature of ListManager Enterprise, and are unavailable for standard or Pro ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Enterprise. The View Triggered Mailings page displays a list of all triggered mailings, from which they can be edited, tested, rescheduled, or deleted.

In addition, a new triggered mailing can be created from this page by clicking create new mailing. For more information on how to create triggered mailings, see [Mailings: Advanced Mailings: New Triggered Mailing](#) or [Mailings: Advanced Mailings: New Triggered Mailing Wizard](#).

### **Finding a Triggered Mailing**

Twenty triggered mailings are shown at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of triggered mailings at a time.

You may change the sorting order of the triggered mailings by clicking the up or down triangles next to the ID, Mailing Name, Subject, or Run Date. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a).

To search this table, click . To export this table as a CSV file, click .

### **Viewing or Editing an Existing Triggered Mailing**

To view a triggered mailing, click the ID for that mailing. You will be taken to the [Mailings: Advanced Mailings: Editing Triggered Mailings](#) page, where you can view the mailing details, edit it, or save and test it.

### **Testing an Existing Triggered Mailing**

Click Test next to the triggered mailing you'd like to test. ListManager will show you the name and subject of the mailing. Enter a valid email address to test that the mailing arrives and verify the content. Enter a sample size (usually 1), and set whether or not to perform spam analysis.

### **Rescheduling a Triggered Mailing**

Triggered mailings can be rescheduled to be sent out on a different date or at a different time. When you click on "reschedule," this opens the "Reschedule Triggered Mailing" page. Here, the Mailing name and Subject are hard coded and cannot be edited, and the current send date and time are displayed. To unreschedule this triggered mailing completely, click unreschedule. This will prevent the mailing from going out at all in the future. Enter the new rescheduled date and time and previous send date and time (if necessary) upon which to base the send date calculations. Changing these values allows you to skip sending mailings for a period of time, or resend the mailing for a period of time.

### **Deleting a Triggered Mailing**

Click Delete next to the triggered mailing you'd like to delete. ListManager will ask you if you're sure before deleting the mailing.

### **Creating a Mailing**

Click create new mailing to be taken to the [Mailings: Advanced Mailings: New Triggered Mailing](#) page.

### **Download as a File**

Click the disk icon to download your triggered mailings in CSV format. This will download the information seen on this page, including the mailing name, subject, run date, etc.

## **Mailings: Advanced Mailings: Triggered Mailings: Edit Triggered Mailings**

---

The Edit Triggered Mailing page is reached from the [Mailings: Advanced Mailings: View Triggered Mailings](#) page, by clicking the ID number next to the triggered mailing you want to view or edit. The editing option is here to allow you to make changes in the frequency, run time, etc., without deleting the mailing and having to create a new one.

There are four tabs on this page to easily edit the triggered mailing:

### **Message Body**

For details, see [Mailings: Need Approval: Edit Mailing: Message Body](#)

### **Message Header**

For details, see [Mailings: Need Approval: Edit Mailing: Message Header](#)

### **Recipients**

For details, see [Mailings: Need Approval: Edit Mailing: Recipients](#)

### **Trigger**

The selected trigger will be displayed here. To edit this trigger, click the *edit* button to go to the [Segments: New/Edit Segment: Essentials page](#). It is not recommended that the segment be edited after the triggered mailing is created. If this is necessary, please make sure that the times set for the mailing correspond with any changes in the triggered segment.

### **Next run time**

Enter the first (next) run time for the mailing. This is the first date/time that the triggered mailing will run, regardless of previous run times and run frequencies. This must be entered in YYYY-MM-DD HH:MM:SS format, or click the calendar to select a date. If no time is entered, it will default to YYYY-MM-DD 00:00:00. The default is tonight at 23:59 (just before midnight).

### **Previous run time (optional)**

This is the original time or date from which the mailing will begin to detect members that will receive this mailing the first time. This must be entered in YYYY-MM-DD HH:MM:SS format, or click the calendar to select a date. If no time is entered, it will default to YYYY-MM-DD 00:00:00. In general, this field will be left blank, in which case the Run Frequency will be used to determine how long before the next run time the trigger will start detecting trigger events. You may wish to enter a specific time, though, in case you wish to immediately send to members who have already met the requirements of the trigger in the last month, for example.

### **Run Frequency**

Select how many days/weeks/months apart this mailing will run. Each time the mailing runs, ListManager will look for members who have met the criteria to receive a mailing, since the last time the mailing ran. The default run frequency is "1 day."

### **Time from trigger event**

Select the number of hours/days/weeks/months/years before or after the trigger event the mailing should run. ListManager will see that the trigger event has occurred, and that the member(s) qualify to receive the mailing, but will not send the mailing immediately; rather it will delay it by the time specified here. For instance, if a member purchased an item on August 29th, 2003, you can then send the mailing 2 days after the purchase (the trigger event) rather than immediately upon the purchase. Then the

setting would be "2 days afterwards". The "before" option is for future triggers that you may anticipate, such as a member birthday or join date anniversary. This would send the triggered mailing the set time prior to the upcoming event (i.e. birthday).

## Mailings: Advanced Mailings: Sequential Mailings: New Sequential Mailing

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Sequential mailings are a feature of ListManager Enterprise, and are unavailable for standard or Pro ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Enterprise.

Sequential mailings are a series of [triggered mailings](#) sent out in sequence, at predetermined time intervals, to each member who qualifies. This group of mailings is considered one "sequence" of mailings, and they all collectively have the same mailing name. Note that to set up this series at varying time intervals with individual [Contents](#) associated with each mailing, the [Sequential Mailing Wizard](#) may be used as a convenient way to quickly create the entire sequence of mailings.

Triggered (and therefore sequential) mailings work on the premise that the time when the mailing is sent to a member depends on some action performed by that member, such as visiting a web page or making a purchase. It can also depend on some date associated with that member, such as their birthday or the date they joined the list.

Triggered mailings run on a regular frequency. This is usually once per day, but could be as often as once per hour, or as infrequently as every several weeks. The exact time of day when it runs is specified by you.

When the triggered mailing is sent, it runs the same way as any other mailing for a specific segment. The mailing depends on which members meet the criteria of the [triggered segment](#), and sends the mailing to them. A key part of the segment is the trigger clause, because this determines who will receive the triggered mailing now (since the last time the triggered mailing was sent).

### Example:

Members who purchase a particular high-end product could receive a "thank you" message the next day, a promotional discount for add-on features after three days, a questionnaire about satisfaction with the product after two weeks, and a series of newsletter articles about the product and related products over the next few months.

### **Creating a Sequential Mailing**

Creating a sequential mailing is much like creating a standard mailing (but with a trigger), except that the "Schedule" tab is replaced by the "Trigger" tab. For details on the other tabs, please see:

- ◆ [Mailings: New Mailing: Message](#)
- ◆ [Mailings: New Mailing: Recipients](#) (the only difference here is that rather than choosing a segment, you will select a segment based on the desired trigger on the Trigger tab.)
- ◆ [Mailings: New Mailing: Tracking](#)

- [Mailings: New Mailing: Internationalization](#)

## Trigger Tab

The Trigger tab is where you select a trigger from the ones created in [Segments: New Triggered Segment](#), and define the times for the mailing to be sent. For details on how to use the Trigger tab, see [Mailings: Advanced Mailings: Trigger Tab](#).

# Mailings: Advanced Mailings: Sequential Mailings: New Sequential Mailing Wizard

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Sequential mailings are a feature of ListManager Enterprise, and are unavailable for standard or Pro ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Enterprise.

Sequential mailings are a series of [triggered mailings](#) sent out in sequence, at predetermined time intervals, to each member who meets the criteria of a single triggered segment. The intervals are set here, and the individual [Contents](#) associated with each mailing in the sequence are selected here. The Sequential Mailing wizard allows you to quickly create a sequentially triggered mailing in one step. It also references the trigger created in [Segments: New Triggered Segment](#). The sequential mailing wizard must be used to set up the individual times and contents for each mailing to be sent out.

## Using the Sequential Mailing Wizard

The sequential mailing wizard is set up to be intuitive and easy to use. The correct segments and triggered mailings *must* be set up prior to using the sequential mailing wizard.

### Name

Select a name to identify your sequentially triggered mailing. This name is not seen by message recipients, so label the mailing in a way that will help you to identify it later in the Mailings main page. 70 characters are allowed in the Name field.

### Trigger

Select the desired trigger from the drop-down menu. In order for triggers to appear here they must first be created in Segments, by clicking on [create new triggered segment](#).

### Track opens

Allows you to track what percentage of your messages were opened by recipients who can see HTML. Opens cannot be tracked for recipients who cannot see HTML.

If a user opens a message using two different clients (e.g., their email client and a web browser), two opens will be recorded, skewing your results.

### Detect HTML capability

Allows you to track whether or not a recipient is able to read HTML. If the recipient can see HTML, the recipient's member record will be updated with that information.



If you send a text-only message, an HTML message will be created and added to your message. Your message will be sent as a multipart-alternative message, since HTML capability cannot be detected for text-only messages.

#### **Track all URLs**

To make all URLs in the mailing clickthrough tracking URLs, choose **Yes**. The default setting for this option is found on the [Utilities: List Settings: Web Created Content](#) page.

#### **Time after the Trigger Event**

The times are set up for each individual mailing in the series. Each time starts counting from the trigger event, not from the previous mailing in the series. So, if the first time is 1 day after the trigger event, and the second time is 3 days after the trigger event, the second mailing will occur 3 days after the trigger event, rather than 4 days.

Select the number of hours/days/weeks/months/years before or after the trigger event the mailing should run. ListManager will see that the triggered event has occurred, and that the member(s) qualify to receive the mailing, but will not send the mailing immediately; rather it will delay it by the time specified here. For instance, if a member purchased an item on August 29th, 2003, you can then send the mailing 2 days after the purchase (the trigger event) rather than immediately upon the purchase. Then the setting would be "2 days afterwards". The "before" option is for future triggers that you may anticipate, such as a member birthday or join date anniversary. This would send the triggered mailing the set time prior to the upcoming event (i.e. birthday).

#### **Content**

Select the Content to be associated with the sequentially triggered mailing. In order for the Contents to appear here they must have been previously created in [Contents](#).

## **Mailings: Advanced Mailings: Sequential Mailings: View Sequential Mailings**

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Sequential mailings are a feature of ListManager Enterprise, and are unavailable for standard or Pro ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Enterprise.

The View Sequential Mailings page displays a list of all sequential mailings. To view the mailings in sequence that comprise each sequential mailing, click on the Sequential Mailing Name link. This opens the Sequential Details page, which displays all of the individual mailings that make up the sequential mailings. These individual mailings can be further edited by clicking the ID number next mailing. This allows you to edit the mailing itself. This can best be described as follows:

**Sequential page** (displays sequential mailings) > **Sequential Details page** (displays individual mailings in sequence for the selected sequential mailing).

In addition, a new sequential mailing can be created from this page by clicking *create new sequential mailing*. For more information on how to create sequential mailings, see [Mailings: Advanced Mailings: New Sequential Mailing](#) and [Mailings: Advanced Mailings: New Sequential Mailing Wizard](#).

Note that the list's recency limits may not be overridden when creating a new sequential mailing using this wizard. However, these limits may be edited later in Mailings: Advanced Mailings: Sequential Mailings: Edit Sequential Mailing.

### **Finding a Sequential Mailing**

Twenty sequential mailings are shown at a time. Note that the view here displays each sequential mailing, NOT the individual mailings that comprise a sequential mailing. To see the individual mailings that belong to a sequential mailing, click on the sequential mailing name to be taken to the Sequential Details page, from where new mailings can be added to the sequence.

To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of triggered mailings at a time.

You may change the sorting order of the sequential mailings by clicking the up or down triangles next to the Sequential Mailing Name or Count. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a).

### **Viewing or Editing an Existing Sequential Mailing**

To view a sequential mailing, click the ID for that mailing. You will be taken to the Sequential Details page, where you can test, reschedule, or delete the mailing in the sequence, or further edit it by clicking the ID.

### **Testing an Existing Sequential Mailing**

Sequential mailings must be tested from the Sequential Details page. Click **Test** next to the mailing in the sequence like to test. ListManager will show you the name and subject of the mailing. Enter a valid email address to test that the mailing arrives and to verify the content. Enter a sample size (usually 1), and set whether or not to perform spam analysis. It is **strongly** recommended that segments are tested when saved, to make sure that no errors occur.

### **Rescheduling a Sequential Mailing**

Sequential mailings can be rescheduled to be sent out on a different date or at a different time. When you click "reschedule," this opens the "Reschedule Sequential Mailing" page. Here, the Mailing name and Subject are hard coded and cannot be edited, and the current send date and time are displayed. To unreschedule this triggered mailing completely, click *unreschedule*. This will prevent the mailing from going out at all in the future. Enter the new rescheduled date and time, previous send date and time (if necessary) upon which to base the send date calculations, or the new send frequency. Changing these values allows you to skip sending mailings for a period of time, or resend the mailing for a period of time.

### **Deleting a Sequential Mailing**

Sequential mailings must be deleted from the Sequential Details page. Click **Delete** next to the mailing you'd like to delete. ListManager will ask you if you're sure before deleting the mailing.

### **Adding Mailings to the Sequence**

Individual mailings must be added to the sequence of a sequential mailing from the Sequential Details page. Click "add to sequence" to be taken to the [Mailings: Advanced](#)

[Mailings: New Sequential Mailing](#) page. Note that you will be unable to edit the mailing name, and the mailing trigger, as these will be preset to the values for your existing sequence.

### **Download as a File**

Sequential mailings must be downloaded from the Sequential Details page. Click the disk icon to download your sequential mailings in CSV format. This will download the information seen on this page, including the sequential mailing name and the number of individual mailings in the sequence.

## **Mailings: Advanced Mailings: Trigger Tab**

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Triggered and Sequential mailings are a feature of ListManager Enterprise, and are unavailable for standard or Pro ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Enterprise.

The fields on the Trigger page allow you to create a mailing to be sent when a particular trigger event occurs. Triggered mailings are associated with a particular segment or with a particular automated message. A trigger is necessary to create a triggered or sequential mailing, and work in conjunction with [triggered segments](#).

Note that the Trigger Tab replaces the [Schedule Tab](#) in standard mailings.

### **Trigger**

Select a trigger from the drop-down menu. In order for triggers to appear here, they must first be created in [Segments: New Triggered Segment](#).

### **Next run time**

Enter the first (next) run time for the mailing. This is the first date/time that the triggered mailing will run, regardless of previous run times and run frequencies. This must be entered in YYYY-MM-DD HH:MM:SS format, or click the calendar to select a date. If no time is entered, it will default to YYYY-MM-DD 00:00:00. The default is tonight at 23:59 (just before midnight).

### **Previous run time (optional)**

This is the original time or date from which the mailing will begin to detect members that will receive this mailing the first time. This must be entered in YYYY-MM-DD HH:MM:SS format, or click the calendar to select a date. If no time is entered, it will default to YYYY-MM-DD 00:00:00. In general, this field will be left blank, in which case the Run Frequency will be used to determine how long before the Next run time the trigger will start detecting trigger events. You may wish to enter a specific time, though, in case you wish to immediately send to members who have already met the requirements of the trigger in the last month, for example.

### **Run Frequency**

Select how many days/weeks/months apart this mailing will run. Each time the mailing runs, ListManager will look for members who have met the criteria to receive a mailing, since the last time the mailing ran. The default run frequency is "1 day".

## Time from trigger event

Select the number of hours/days/weeks/months/years before or after the trigger event the mailing should run. ListManager will see that the trigger event has occurred, and that the member(s) qualify to receive the mailing, but will not send the mailing immediately; rather it will delay it by the time specified here. For instance, if a member purchased an item on August 29th, 2003, you can then send the mailing 2 days after the purchase (the trigger event) rather than immediately upon the purchase. Then the setting would be "2 days afterwards". The "before" option is for future triggers that you may anticipate, such as a member birthday or join date anniversary. This would send the triggered mailing the set time prior to the upcoming event (i.e. birthday).

### IMPORTANT NOTE Regarding Setting the Timing of Triggered Mailings

Keep in mind how the **Run Frequency** and **Time from trigger event** settings work together to determine the timing of triggered mailings. In general, the **Time from trigger event** setting is constrained by the **Run Frequency** setting. If you set both to the same time, the results can be unexpected. Here's an example.

Let's say you set **Run Frequency** and **Time from Trigger Event** both to one hour. Your trigger is "when a recipient opens their email."

At 11:59 a.m., someone opens their email. The **Run Frequency** setting is "check every hour," so at 12 noon, ListManager checks and sees that someone opened their email. Since the **Time from trigger event** setting is "send after one hour," and one hour has not passed, the triggered mailing is not sent. ListManager checks again at 1:00 p.m.; since more than an hour has passed since it found a qualifying event (the opened email), the mailing is sent.

However, let's say that the email was opened only two minutes later, at 12:01 p.m. The next time ListManager checks to see who has opened their mail is 1:00 p.m. When it does, it sees that mail was opened at 12:01 p.m., but since an hour has not quite passed, the **Time from trigger event** setting's criteria has not been met, so the triggered mailing isn't sent. ListManager checks again at 2:00 p.m.; by this time, more than an hour has passed, so the triggered mailing is sent.

To sum up, setting **Time from trigger event** to a particular interval doesn't mean a mailing will be triggered at precisely that interval. Results will generally be more predictable if **Run Frequency** has a lower setting than **Time from Trigger Event**.

## Mailings: Advanced Mailings: New Split Test Mailing Wizard

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You can create different versions of your message, test them on small random subsets of your mailing list, and then compare the results to see which message is most effective. This kind of testing, called "split-testing," eliminates any demographic or action-based bias that could alter your results. Once you determine which message gives the best results, you can send it to the rest of your list.

**Note:** Split testing is a feature of ListManager Enterprise, and is unavailable for standard ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Enterprise.

Before you can do a split test, you must first create at least two content items you intend to use in the test.

### **To go to the Split Test Mailings Wizard**

In the left Navigation Bar, click **Mailings**, point to **Advanced Mailings**, then point to **Split Test Mailings**, and then click **Split Test Mailings Wizard**.

## **Using the Split Test Mailings Wizard**

### **Split Test Name**

Select a name to identify your split test. You can type up to 70 characters.

### **Split Test Description**

Type in a description for your split test.

### **Segment**

The default setting is all the members in your mailing list. To choose a particular segment, click the **Segment** box and then select the segment you want.

### **Sampling Methodology**

You can choose to send the test message to either a percentage of your mailing list, or a specific number of members in the list.

#### **To send the message to a percentage**

Select **% of Segment**, and then in the **Total % to receive test** box, type the percentage of the segment you want to send the mailing to.

#### **To send the message to a specific number of members**

Select **# of Members**, and then in the **Total # to receive tests** box, type the number of segment members you want to send the mailing to.

### **Content 1**

Click the arrow in the **Content 1** box, and then select the content you want to send to the first group.

### **Content 2**

Click the arrow in the **Content 2** box, and then select the content you want to send to the second group.

### **To view the content**

Click the **View** button for the content.

### **To add another Content item to the test**

1. Click the More button.
2. Click the arrow in the **Content 3** box, and then select the content you want.

**NOTE** The **More** button is only available as long as you have more potential Content items to add.

### **To remove the most recently added Content item**

Click the **Less** button.

To continue, click **Next**.

## Screen 2

### Purge From

If you want to purge members who have received previous messages, click **Choose Mailings**.

### Suppression list

#### To add a list of members who should not receive this email

1. Click the **Choose File** button next to **Suppression list**.
2. To terminate importing of the list after a certain number of malformed addresses, click the box next to **Terminate import**, and then select an option from the list.
3. Click the **Browse** button next to the **Select file** box, and then navigate to the suppression list you want.
4. Click **OK**.

### Recency Limit

To purge members who have recently received email from you, click **Edit Recency**.

### Track opens

To keep track of the members who open your test email, select this option.

### Detect HTML capability

To detect if a member's email software is capable of viewing HTML, select this option.

### Track all URLs

Makes all URLs in the mailing clickthrough tracking URLs when **Yes** is selected (this is the default option).

To go back to the previous screen, click **Go Back**. To continue, click **Next**.

## Screen 3

On this screen, you can review the options you chose.

### To go back to previous screens

Click **Go Back**.

### To send your test messages

Click **Send**.

### To save your split test without sending

Click **Save**.

### To cancel your split test

Click **Cancel**.

## View Split Test Mailings

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On the **View Split Test Mailings** page, you can view the results of or delete an existing split test, or create a new split test.

### To view the results of a test

Click the **View Results** command for the test.

### To delete a test

Click the **Delete** command for the test.

### To create a new split test

Click **New Split Test**.

[Tell me more.](#)

### To send the winning mailing to the rest of your segment

1. Click the **View Results** command for the test.
2. Click the **Send Rest** command for the winning mailing.

## View Split Test Results

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On the **Split Test - View Results** page, you can view the results of your split tests, go to reports that show you different types of statistics, and send the winning email to the rest of your list.

### To view reports

Click the **Success**, **Opens**, or **Clickthroughs** button.

### To send the winning mailing to the rest of your segment

Click the **Send Rest** command for the winning mailing.

### To see fewer or more titles in the table

Click **Show fewer** or **Show more**.

## Scheduled

### Mailings: Scheduled

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The Mailings: Scheduled page shows you all mailings which are scheduled to be sent at a future time.

#### Finding a Mailing

Twenty mailings for the list are displayed in Mailings: Scheduled. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of mailings at a time.

You may change the sorting order of the mailings by clicking the up or down triangles next to ID, Name, Subject, or Send Date. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty mailings, **Previous** to see the last twenty.

To search this table, click . To export this table as a CSV file, click .

### Viewing or Editing a Mailing

To view a mailing, click on the mailing name. You will be taken to the [Mailings: Scheduled Mailings Edit Mailing](#) screen, where you can view the mailing, edit it, or save and test it.

### Sending a Mailing

To send a mailing, click **Send Now** next to the mailing. Your message will sent out immediately.

If you have multiple mailings with the same name and title, you will also have the option to send all of these mailings to be sent at the same time. Multiple mailings such as these are created when you send a single message to multiple subsets or lists.

### Testing a Mailing

Click **Test** next to the mailing you'd like to test. You will be taken to the [Mailings: Test Mailing](#) page.

### Rescheduling a Mailing

To change the scheduled time a mailing should be sent, click on Reschedule next to the mailing. The Title, Subject, Current Send Date, and Reschedule Send Date will be displayed. To reschedule the date and time the message should be sent out, enter the date and time in Reschedule Send Date.

You may also click on **Unschedule** to prevent a message from being sent at the scheduled time. The message will then appear in [Mailings: Need Approval](#).

If you have multiple mailings with the same name and title, you will also have the option to schedule all of these mailings to be sent at the same time. Multiple mailings like this are created when you send a single message to multiple subsets or lists.

### Copying a Mailing

Click **Copy** next to the mailing you'd like to copy. ListManager will show you the old title, and will ask you the new title you'd like. You might want to copy a mailing if you'd like to send it again at a future date.

### Deleting a Mailing

Click **Delete** next to the mailing you'd like to delete. ListManager will ask you if you're sure before deleting the mailing.



If you have multiple mailings with the same name and title, you will also have the option to delete all of these mailings at the same time. Multiple mailings like this are created when you send a single message to multiple subsets or lists.

### Creating a Mailing

Click **Create New Mailing** to be taken to [Mailings: New Mailing](#)

### Download as a File

Click on the disk icon to download your mailings in CSV format.

Note that triggered and sequential mailings can be "unscheduled" as well. For more information, see [Mailings: Advanced Mailings: New Triggered Mailing](#) and [Mailings: Advanced Mailings: New Sequential Mailing](#).

## View Outgoing Mailings

### Mailings: View Outgoing Mailing: Message Body

#### Mailing Name

The name you've given this mailing. This name is not seen by message recipients. To change the name of the mailing, type in the desired name and click Save.

#### Body

The body of the message you're sending. If you've created both a text and HTML body for your message, you'll see some encoding that allows email clients to select which version they can open and read. It will look something like this:

```
This is a multi-part message in MIME format.
```

```
-----  
Content-Type: text/plain; charset="iso-8859-1"  
Content-Transfer-Encoding: 7bit
```

#### Deleting Mailings

Note that a mailing can only be deleted when it has been completed. The **Delete** button will not be available until this occurs.

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### Mailings: View Outgoing Mailing: Message Header

#### Header

The message header will be displayed here. Parts of the header will appear as mail merge tags (e.g., %%emailaddr%%). However, the information appropriate for each recipient was merged in when the mailing was sent.

## Mailings: View Outgoing Mailing: Recipients

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### Total Recipients

The total number of recipients being sent to.

### To view a table with more detailed information about the recipients

Click the **View Recipient Details** button.

This opens the [Mailings: Mailing Status: View Outgoing Mailing: Mailing Recipients](#) page and display "All" recipients.

### Successfully Sent

The number of recipients successfully sent and delivered to.

### To view a table with more detailed information about these recipients

Click the **View Successful** button.

This opens the [Mailings: Mailing Status: View Outgoing Mailing: Mailing Recipients](#) page and displays the table with the Success filter on.

The following sections are displayed only under certain conditions:

**Mailing Paused:** Will only be displayed if an administrator manually paused the mailing. Displays the number of recipients affected by this, including those that have not been attempted (0 attempts), or in retry (more than one attempt with a transient failure). For more information on pausing mailings, see [Mailings: View Outgoing Mailing: Mail Queue](#).

The **View Paused** button opens the [Mailings: Mailing Status: View Outgoing Mailing: Mailing Recipients](#) page, with the Paused filter on, so only paused recipients will be immediately visible.

**Mailmerge Abort:** Will only be displayed if there is a scripting error in TclMerge and the "errormode" function is set to "abort" or "notify". If this is the case, a Tcl error will cause the mailing to abort. Alternatively, if the Tcl Merge "abort" command is used, a recipient in this status will be created. The error mode function is used as follows:

```
errormode abort
or
errormode notify name@example.com
```

The view aborted button opens the [Mailings: Mailing Status: View Outgoing Mailing: Mailing Recipients](#) page, with the Aborted filter on, so only aborted recipients will be immediately visible.

**Mailmerge Skip:** Displays the number of recipients skipped by mailmerge. Recipients are skipped by using the skip mail merge command. This is based on user-specified

criteria. The view skipped button opens the [Mailings: Mailing Status: View Outgoing Mailing: Mailing Recipients](#) page, with the Skipped filter on, so only skipped recipients will be immediately visible.

**Failure and Rejection Message Buttons:** If you any of your mail resulted in a transient or permanent failure, the following buttons appear on the page:



[Learn about the Rejection Messages page.](#)

### Segment

Displays the segment(s) that the mailing was sent to.

### Add Recipient

Enter an email address and click **Save** to send the mailing or message to the email address specified. Only one email address may be specified at a time.

This feature may be used to resend delivery or other reports to administrators.

## Mailings: View Outgoing Mailing: Mailing Recipients

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The Mailings Recipients page shows you recipient details for a particular mailing. From here, member details can be viewed and edited, and the send details associated with sending that mailing to the particular recipient can be accessed.

### Finding a Recipient (Member)

From the drop-down menu, select the desired view for mailing recipients. "All" will display all recipients for the mailing, which can then be sorted by status if necessary; alternatively, the view can be filtered by the following recipient statuses:

- All
- Not Attempted, Active, Retry
- Success, Failure, Expired
- Aborted, Skipped
- Active
- Retry
- Success

- Permanent and Transient Failure
- Permanent Failure
- Transient Failure
- Expired
- Paused
- Aborted
- Skipped

Twenty recipients for the mailing are displayed. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of recipients at a time.

You may change the sorting order of the recipients by clicking the up or down triangles next to **Username**, **Domain**, **Status**, **Send-try**, and **Next attempt**. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty recipients, **Previous** to see the last twenty.

The sort options are:

**Username**

The name of the recipient. What you see here is everything to the left of the "@" symbol in the user's email address. For example, "joe\_person".

**Domain**

The domain name of the recipient. What you see here is everything to the right of the "@" symbol in the user's email address. For example, "example.com".

**Status**

The status of the recipient. To see a filtered view by status, select the desired status type in the drop-down menu described above.

**Send-try**

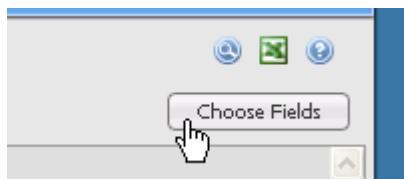
The number of attempts at sending the mailing to that recipient. If the number is 1, the mailing was successfully sent on the first try.

**Next attempt**

The date for the next scheduled mailing attempt for the recipient.

**To customize the Mailing Recipients Table**

1. Click the **Choose Fields** button.
2. In the **Available Fields** box, click the field you want to add to the table.
3. Click the **Add** button.





The field appears in the **Chosen Fields** box.

4. When you are finished, click **OK**.

**NOTE** If you save the table as a CSV file (see below), any fields you added to the table will be included in the CSV file.

#### To remove a field from the Chosen Fields box

1. Click the field.
2. Click the Remove button.



#### Member History

Click **Member History** to go to the [Members: History](#) page, where you can see the member's current information, and opens, clickthroughs, etc.

#### View sending details

To see the recipient sending details associated with how the mailing was sent, including [basics](#), [transaction log](#), and [bounce message](#) information.

#### To save the table as a CSV file

Click the spreadsheet button.



This saves the table in a text file format known as CSV (comma separated values). CSV files can be opened and edited with many programs, including Excel.

## Mailings: View Outgoing Mailing: Rejection Messages

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The Rejection Messages page shows you any rejection messages sent to you, resulting from transient or permanent failures for a particular mailing. From here, member details can be viewed and edited.

To view the mailing itself, click the mailing link at the top of the page. This will take you to the [Mailings: Mailing Status: View Outgoing Mailing: Message Body](#) page.

#### Finding a Rejection Message

From the drop-down menu, select the desired view for rejection messages. "All" will display all the rejection messages for the mailing; alternatively, the view can be filtered to see either transient or permanent failure messages only.

Twenty rejection messages for the mailing are displayed. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of rejection messages at a time.

You may change the sorting order of the rejection messages by clicking the up or down triangles next to Type, User, and Domain. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click on **Next** to see the next twenty recipients, **Previous** to see the last twenty.

The sort options are:

**Type**

Displays the type of failure (bounce). It will either be permanent or transient.

**User**

Displays the username. This will be everything to the left of the "@" symbol in the user's email address. For example, in the user ID "jane\_person@example.com," the name "jane\_person" will be displayed.

**Domain**

Displays the user domain. This will be everything to the right of the "@" symbol in the user's email address. For example, in the user ID "jane\_person@example.com," the domain "example.com" will be displayed.

**Message**

A detailed log of the rejection message(s) for the failure.

**View Member**

To view a member, click "view member". You will be taken to the [Members: New/Edit Member: Basics](#) page, where you can view the member, edit it, or save it.

## Recipient Sending Details

### Mailings: View Outgoing Mailings: Mailing Recipients: Recipient Sending Details: Basics

---

**Title**

Displays the name of the mailing. This can be clicked to go to the [Mailings: Mailing Status: View Outgoing Mailings: Message Body](#) page, to access detailed information about the mailing itself.

**Date**

Displays the date and time when the mailing was sent to the particular recipient.

### Message ID

Displays the ID of the mailing. This can be clicked to go to the [Mailings: Mailing Status: View Outgoing Mailings: Message Body](#) page, to access detailed information about the mailing itself.

### Recipient

Displays the member (recipient) email address. Clicking on the address takes you to the [Members: Edit Member: Basics](#) page, where member information can be accessed and edited.

### Status

Displays the status of the mailing for that recipient. The following are the possible status messages:

- Not attempted
- Active
- Retry (displays the date and time for the next retry attempt)
- Completed: The destination mail server reported a temporary failure error code (between 400 - 499).
- Completed: The destination mail server reported a permanent failure error code (500+).
- Completed: A temporary DNS failure occurred.
- Completed: The domain is reported to be bad via DNS.
- Completed: A bounce was received for this recipient.
- Completed: An attempt was made to send to an email address (rather than a member ID) and that address is not syntactically valid.
- Completed: The message to send for this recipient was deleted from the database.
- Completed: The expiration date to send the mailing was reached before all attempts were completed.
- Completed: The recipient was not processed due to the skip command in mailmerge.
- Completed: The recipient was not sent to because the mailing was stopped during mail merging by the "abort" command.
- Paused

## Mailings: View Outgoing Mailings: Mailing Recipients: Recipient Sending Details: Log

---

### Log

Displays detailed information for each message associated with this recipient. The log information includes the recipient's email address, DNS information, TCP/IP connection information, the message body, etc. The status of each recipient is also displayed. The level of detail seen here can be set in [Utilities: List Settings: Basic Information: Enable Features](#), on the Recipient logging level drop-down menu.

If the mailing was stopped by an administrator, the transaction will display a message saying "Mailing stopped by administrator" to inform you that it was manually stopped and did not experience some other failure or stop mechanism.

If there is no log available for this recipient, ListManager will display a "No transaction log" message.

## **Mailings: View Outgoing Mailings: Mailing Recipients: Recipient Sending Details: Bounce Message**

---

### **Bounce**

Displays detailed information if there were any permanent failures associated with this recipient. It will display the email address(es) that suffered the permanent error, a copy of the message, etc.

If there are no permanent failure messages for this recipient, ListManager will display a "No bounce message received" message.

## **Mailings: View Outgoing Mailing: Log**

---

### **Log**

The record of all the tasks ListManager has performed in sending out this message. You'll see the dates and times when the message was sent, along with the number of recipients sent to.

## **Mailings: View Outgoing Mailing: Mail Queue**

---

### **ID**

The ID number ListManager has assigned this mailing.

### **Status**

The status of this mailing (this is not to be confused with the recipient mailing status). Recipient mailing statuses can be seen on the [Mailings: View Outgoing Mailing: Mailing Recipients](#) page.

### **Active**

These are mailings that are either new or in retry mode, which are currently being delivered. When a mailing is active, it can be paused by clicking the **Pause** button, which will put the mailing in Paused mode.



**Paused**

Mailings that have been manually paused (while active). Once a mailing is paused, it can then be resumed by clicking the *resume mailing* button. ListManager will take you to a confirmation page, asking if you are sure that you want resume the mailing.

The mailing can be stopped completely by clicking the *stop mailing* button. Once a mailing is stopped, it cannot be resent. Stopping a mailing deletes recipients who have not yet been attempted. Of these, recipients which have experienced transient failures, can either be deleted, marked as a success, or marked as a failure. Deleting a recipient ensures that their attempts have no effect on reports or bounce counts (as if they were never attempted). A success would be useful for a mailing that has been in retry mode for only a short time (i.e. several hours), and the majority of remaining recipients would most likely succeed. A failure would be useful for a mailing that has been in retry mode for a long time (i.e. several days), and it does not look like the remaining recipients will succeed.

**Completed**

All attempts have been made for the mailing, and no further retries will occur.

**Pausing (x) Recipients Have Been Paused, (x) Recipients are Currently Sending**

This is a temporary status which occurs when a user first pauses a mailing. While it is pausing, this will be the status displayed, showing the number of recipients which have been paused, and those which are currently sending (on their way to being paused).

**List Name**

The name of the list this message was sent to.

**Date Created**

The date this mailing was created.

**Don't attempt after**

The date, in YYYY:MM:DD format, on which no further attempts should be made for this mailing. Any transient failures will be retried only up to and including this date. This is like an "expiration date" for the mailing. This can be very important in the case of mailings with expiring coupons or information about current events.

**Deleting Mailings**

A mailing can only be deleted when it has been completed. The **Delete** button will not be available until this occurs.

## Campaigns

### Mailings: Campaigns

---

ListManager lets you group related mailings together in campaigns. You may then view delivery and tracking information for the campaign in ListManager's Reports.

## How do I create a campaign?

1. In the left Navigation bar, click Mailings: Campaigns.
2. Click *create new campaign*.
3. Enter a Campaign Name.
4. Enter a Campaign Description.
5. Determine what the campaign Applies to: -- the list, the site, or the entire server.
6. Select which mailings you'd like assigned to the campaign. You may create a campaign with no mailings, and assign mailings to it later in [Mailings: New Mailing: Tracking](#).
7. Click **Save**.

A mailing may belong to as many campaigns as you like.

## How do I assign a mailing to a campaign?

You may assign a mailing to a campaign when you create the campaign in Mailings: Campaign, or edit the campaign later to include a mailing.

You may also assign a mailing to a preexisting campaign when you create the mailing. Assign a mailing to a campaign on the [Mailings: New Mailing: Tracking](#) tab.

## Finding a Campaign

Twenty campaigns are displayed in Mailings: Campaigns. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of campaigns at a time.

You may change the sorting order of the mailings by clicking the up or down triangles next to Campaign or Description. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty mailings, **Previous** to see the last twenty.

Use the drop down box in the upper left corner to view list, site or server level campaigns.

## Viewing or Editing a Campaign

To view a campaign, click on the campaign name. You will be taken to the [Mailings: Campaigns: Edit Campaign](#) screen, where you can view which mailings are assigned to the campaign, and add or remove them.

## Copying a Campaign

Click **Copy** next to the campaign you'd like to copy. ListManager will create a new campaign with the original name and description with the word "-copy" to distinguish it from the original campaign.

## Deleting a Campaign

Click **Delete** next to the campaign you'd like to delete. ListManager will ask you if you're sure before deleting the campaign.

## Creating a Campaign

Click *create new campaign* to be taken to [Mailings: Campaigns: New Campaign](#).

# Mailings: Campaigns: New Campaign

---

## Campaign Name

Required. The name of this campaign. The campaign name must be unique on the server. The campaign name and description will be displayed in Mailings: Campaigns and when selecting campaigns for a mailing when creating a new mailing.

## Campaign Description

Required. A description of this campaign. The campaign name and description will be displayed in Mailings: Campaigns and when selecting campaigns for a mailing when creating a new mailing.

## Applies to

Specifies whether this campaign is available for a particular list, a site or server-wide.

## Available Mailings

A list of mailings available for this campaign. You will see mailings for the lists you have administrative access for. Use the > button to move selected mailings to Chosen Mailings.

## Chosen Mailings

A list of mailings selected for this campaign. Use the < button to remove selected mailings.

# Preview Mailing

---

The Preview Mailing feature allows you to see what the content will look like for random recipients, or for the email address you specify. Preview mailing can show you how mail merge, conditional content and scripting will appear for specific recipients.

Preview Mailing is a button that appears at the bottom of the Mailing: New Mailing: Message tab. It is also available for mailings pending administrator approval (Mailing: Approval: Edit Mailing Needing Approval) and Mailings: Edit Scheduled Mailing.

## Member

Preview Mailing displays the message for the email address here. By default, your email address (the address of the administrator logged into ListManager) will be displayed here. Click **View Random** to view the mailing for a random recipient of the mailing. Or, enter the email address of a member you would like to preview and click **View**.

If the address entered is not a recipient of the mailing, ListManager will warn you and display the mailing without merging in custom content for that address.

Note: Preview Mailing should not be used to test whether the specified address will receive the mailing. When previewing a mailing, ListManager does not check if the specified address will be purged due to recency limits, or because they're on a suppression list or a recipient of a mailing that has been purged from receiving this mailing.

### **Header**

The From:, To: and Subject fields of the header, with all content merged for this recipient.

### **Text Message**

The text portion of the mailing, with all content merged for this recipient.

### **HTML Message**

The HTML portion of the mailing, with all content merged for this recipient. At the bottom of the HTML message, there is a link you may click to view the HTML portion of the message in your web browser.

### **Go Back**

Return to creating or editing this mailing.

## **Mailings: Test Mailing**

---

When you test a mailing, ListManager creates the message for a random recipient of your list. However, instead of sending this mailing to the member, it sends it to you. In this way, you can see exactly what the mailing will look like for your recipients. Testing a mailing is especially important if you are using conditional content, scripting, or any special formatting.

*Do not be alarmed if you receive a message addressed to someone else!* ListManager creates the mailing for the recipient(s), but *redirects* it to you. The mailing has *not* been sent to your list, or to the person whose email address is on your test mailing.

If you or others in your organization have difficulty receiving messages addressed To: someone else, you may set [Utilities: Administration: Server: Server Settings: Advanced: Enable Features: Use Real Recipient Address When Merging Test Messages](#) to "yes".

### **Name**

The name of the mailing you're testing.

### **Subject**

The subject of the mailing you're testing.

### **Send Test To**

The email address(es) where the test messages should be sent. By default, your email address is here, but you can send these test messages to any email address. Specify multiple email addresses to which to send test messages with a comma:

```
bob@example.com, jane@example.com
```

### **Test Sample Size**

The number of sample messages you'd like to receive. If you select 10, for example, you will receive ten separate messages, all addressed to recipients of your list, but redirected to you so you can see what the message would look like for them. The sample is randomly selected from your list(s) or subset(s).

### **Perform Spam Analysis**

ListManager can analyze your message using Spam Assassin, a popular anti-spam program used by many people. Your message will be subjected to a number of tests and assigned a score; the lower the score, the less likely your message will be filtered as spam.

If your message fails a particular spam-detection test, Spam Assassin assigns it a certain number of points. After all of the tests are complete, your points are summed and presented as a total score. Lower scores are better—they indicate that your message has fewer traits common to junk mail. Ideally, you want to get your message close to 0 points.

Some of Spam Assassin's tests work the other way around: if you pass them, they assign your message a certain number of \*negative\* points. This helps reduce your overall score.

The first test recipient will receive an email message for each test message sent, with the final score and an explanation of how the score was reached.

More information about the tests Spam Assassin uses may be found here:

<http://www.spamassassin.org/tests.html>

Please remember that email standards and anti-spam rules are based on complex algorithms, and some of Spam Assassin's results may require the explanation of a Systems Administrator. Our technical staff has years of experience with email filtering, and we offer that expertise to our software and hosting customers who have support contracts. If you need help resolving a difficult false-positive, please contact us at (800) 768-2929 or (510) 549-4350 to discuss your campaign.

### **EmailAdvisor Service**

If you subscribe to [EmailAdvisor](#), you may opt to audit your mailing as part of a test before sending it. You may additionally opt to use the EmailAdvisor service when [creating your mailing](#) so that it is audited when it is sent to your list or segment.

Note: When using the EmailAdvisor service for a test, the test mailing will initially show that the message is being sent to a larger number of recipients than you specify. As the test progresses, the size of the mailing will match the Test Sample Size you have specified.

### **Blacklist Monitor**

Blacklist Monitor checks the all the domains and IP addresses in your message, including those contained in your message content, and sees if any of them are listed in any of over 300 Internet blacklists.

### **Inbox Snapshot**

Inbox Snapshot captures what your message looks like in more than forty email clients. It shows you what the message looks like both in the preview and main message panes, with and without images. Inbox Snapshot also includes a spell check, HTML validator and link validator to ensure that your message looks right.

### **Delivery Monitor and Content Analyzer**

Delivery Monitor checks if the message has been received at more than forty ISPs and email providers, and if so, whether it reached the main mailbox or the bulk folder. It can also show if there have been changes in deliverability during the course of your campaign. Content Analyzer tests your campaign against thirty spam filters, and shows you what elements of your message make it prone to be filtered as spam.

Select which Delivery Monitor and Content Analyzer audits to run from the drop-down list.

### **Reports Sent To**

The email address EmailAdvisor reports will be sent to.

# Reports

## Reports -- Overview

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ListManager offers extensive reporting on your mailings and membership. There are eight categories of pre-built reports: Mailings, Members, Server Performance, Web site, Purchases, Interest and Surveys. If ListManager doesn't have the built-in chart you're looking for, create your own in Custom Charts. In addition, a sales-cycle map and a general map of all charts allow you to access all the reports in one view, to find the one you need more quickly.

The [EmailAdvisor](#) reports are also available here if you subscribe to the [EmailAdvisor service](#).

The charts available to you depend on your license level. Purchases and Interest charts are available to Enterprise license levels only. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Pro or Enterprise.

Note that the charts will only display 19 data points, but the chart table will have all the data points for that report. All the data for the selected report may be downloaded as a csv file by clicking on the disk icon in the upper right hand corner of the table.

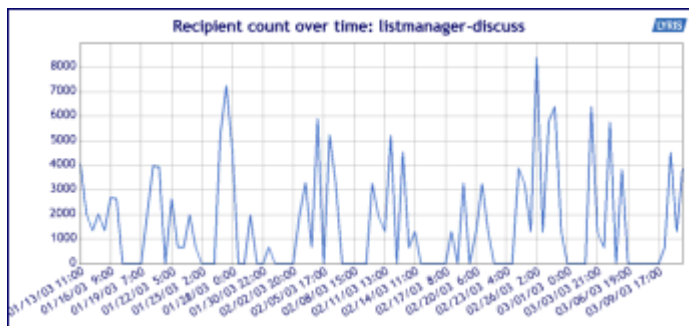
The Lyris logo may be removed or your own logo inserted if you have the [Rebrandable](#) version of ListManager.

Depending on the kind of report you select, the following selections may be available to you:



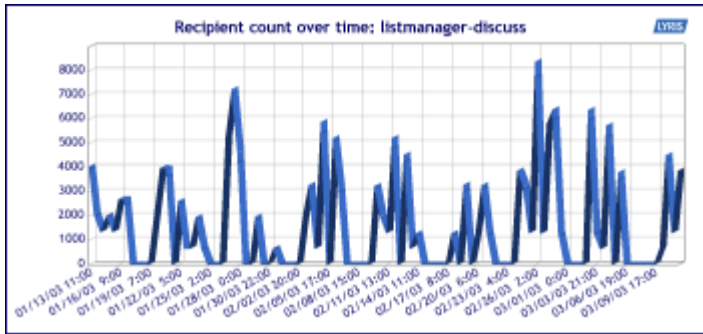
### Line Chart

When you click on the Line Chart Icon, this is how you will see your data displayed:



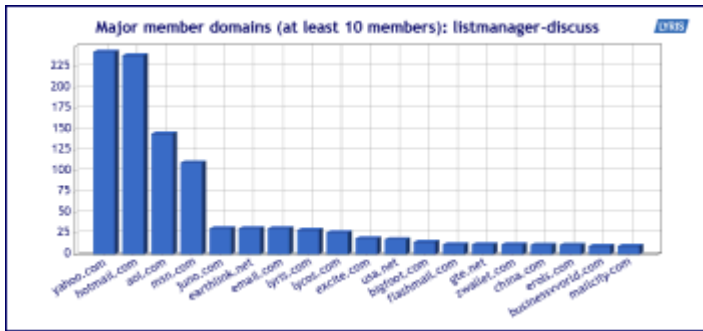
### 3D Line Chart

When you click on the 3D Line Chart Icon, this is how you will see your data displayed:



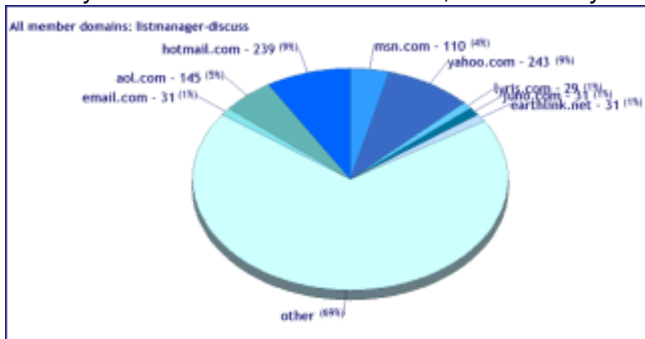
### Bar Chart

When you click on the Bar Chart Icon, this is how you will see your data displayed:



### Pie Chart


When you click on the Pie Chart Icon, this is how you will see your data displayed:



### Table


When you click on the Table Icon, this is how you will see your data displayed:



 Chart table

Recipient count over time for a specific list

- List: listmanager-discuss
- Number of days: 21900
- End date:

X Label	Y Value 
01/13/03 11:00	4056
01/14/03 1:00	2024
01/14/03 15:00	1240

Note that the charts will only display 19 data points, but the chart table will have all the data points for that report. All the data for the selected report may be downloaded as a csv file by clicking on the disk icon in the upper right hand corner of the table.



Click on the Change Chart Properties to change the parameters of your chart - the dates charted, for example.





 Chart options

Chart title:

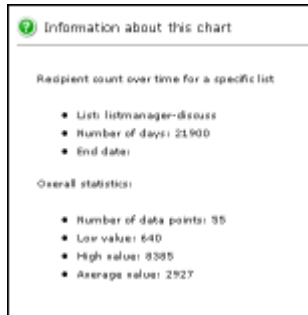
End date:   (blank for today)

List:  

Number of days:  



Information about the chart, including a legend. The legend can be set to appear by default by the server administrator, in [Utilities: Administration: Server: Server Settings: Advanced: Enable Features](#), however even if no legend appears here (it was set to not appear), it can be viewed by clicking the question mark.



## Reports: Report Dashboard

---

The Report Dashboard gives you a variety of information in graphic format about recent mailings, member lists, server performance, and sales resulting from your email marketing.

**Note:** The Report Dashboard requires the installation of Macromedia Flash Player.

### To choose which mailings and time period to look at

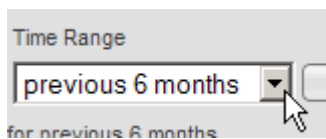
1. Click the View List button for the **List(s)** box.



2. Click the site or list you want.

3. Click the **previous** box and choose a time period.

4. Click the down arrow in the **Time Range** box.



5. Click the time range you want.

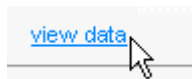
6. Click the **Go** button.

### To change the mailings and time period being viewed

- Follow the steps above to make different selections, and then click **Go**.

### To view more detailed information about a section of the Dashboard

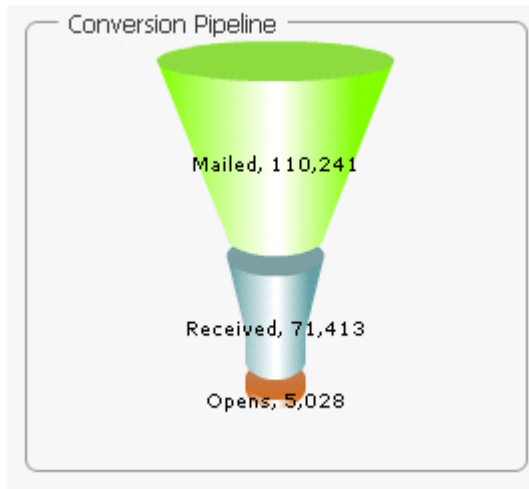
Click the **view data** command for that section.



### Conversion Pipeline

Gives you a graphic representation of the following:

- Messages mailed, received, and opened.
- Number of clicks and conversions resulting from the mailings.



### Summary Statistics

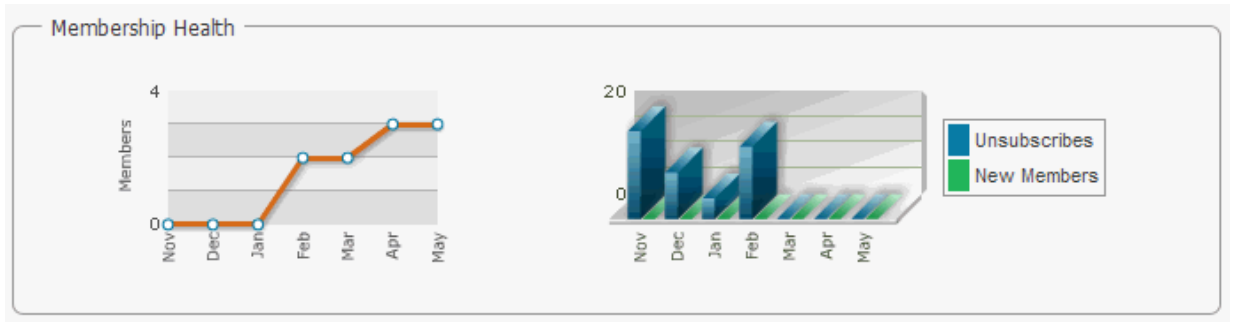
Gives you a Delivery and Tracking Statistics and Mailing Performance for the current month-to-date.

Summary Statistics					
Delivery & Tracking Statistics			Mailing Performance		
	Current Month To Date	Monthly Average		Current Month To Date	Monthly Average
Attempted	2458	17963	Subscribes	0 (0.0%)	0 (0.0%)
Delivered	2439 (99%)	11495 (63%)	Unsubscribes	1 (0.0%)	34 (0.2%)
Soft Bounces	0 (0.0%)	2 (0.0%)	Forwards	9 (0.4%)	50 (0.3%)
Hard Bounces	12 (0.5%)	74 (0.4%)	Referrals	0 (0.0%)	0 (0.0%)
Opens	199 (8%)	804 (4%)	Replies	0 (0.0%)	0 (0.0%)
Clicks	0 (0.0%)	0 (0.0%)	Complaints	0 (0.0%)	0 (0.0%)
Page Views	0 (0.0%)	0 (0.0%)			
Conversion	0 (0.0%)	0 (0.0%)			

### Membership Health

The chart on the left tracks the overall size of your list; the chart on the right gives you information about unsubscribes and new members.

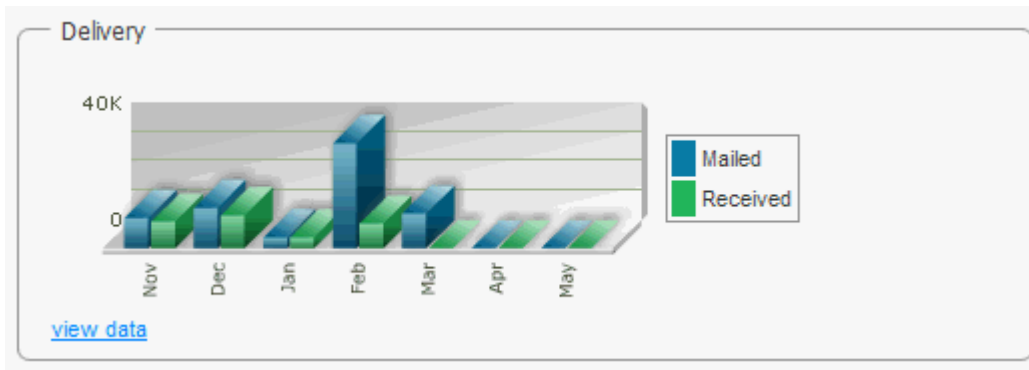
To view the statistic for a particular month, move the pointer over the node for that month in the first chart, or the the bar for that month in the second chart.



## Delivery

Shows you how much mail was send and received.

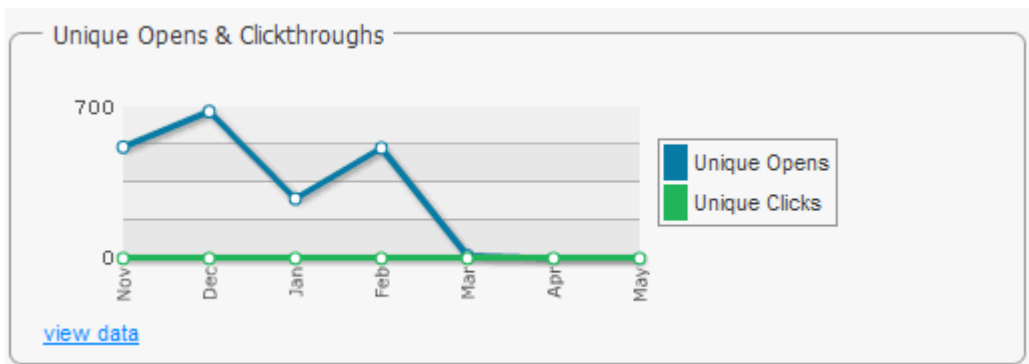
To view the statistic for a particular month, move the pointer over the bar for that month.



## Unique Opens & Clickthroughs

Shows you unique opens and unique clicks.

To view the statistic for a particular month, move the pointer over the node for that month.



# Mailing Overview

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The Mailing Overview page provides an overview of the success and failure rates of individual mailings or campaigns.

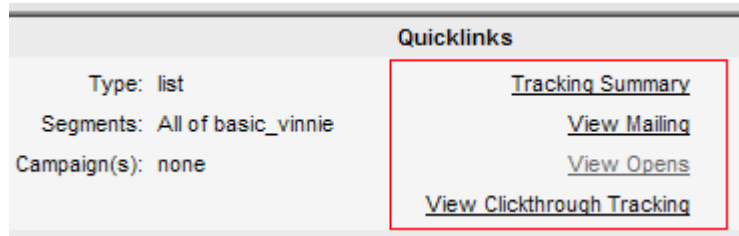
## To view a mailing

1. Click the **Mailing Type** box, and then select the category you want. This option acts as a filter for the Mailing/Campaign list; only items that fit the mailing type you selected will be available in the list.
2. Click the **Mailing/Campaign** box, and then select the mailing/campaign you want.

## Quicklinks

### To view details about a mailing

Under **Quicklinks**, click one of the commands listed.



**Tracking Summary:** Tells you how many people have opened your message, clicked on a tracked URL, or gone from one of your mailings to other pages on your Web site.

**View Mailing:** View the message body, message header, recipients, log and mail queue information.

**View Opens:** View details about recipients who opened your message.

**View Clickthrough Tracking:** View details such as the clickthrough time, destination IP address, and URL.

The information includes recipient counts, open statistics, clickthrough statistics, clickstream statistics, purchases, interest data, member changes, any surveys answered, and the mailing status.

The charts give you trend information for that statistic. Click on the chart title to see a full chart, including legend information.

## Delivery Results

Displays a pie chart with a uniquely colored section for each Delivery category (see below).

## Delivery

**Successful Sends:** The number of emails that were successfully received by recipients.

**Soft bounces:** Email that has bounced back to the sender undelivered after it has been accepted by the recipient's mail server.

**Technical failures:** Technical failures are failures of the delivery of email due to problems on the receiving equipment or infrastructure, such as DNS resolution issues, connection timeouts, greylisting, or server errors due to non-user specific disk space problems.

**Uncategorized failures:** A failure that doesn't easily fit into one of the other categories.

**Invalid Users:** For some reason, the email addresses are not legitimate ones (this is often caused by spelling errors).

**Content Blocks:** Content blocks are responses that indicate that the message is rejected for issues detected by a content filter. The filter may conclude that your message contains spam-like content, non-RFC compliant content, blacklisted URLs in the content, etc

**Mailstream blocks:** You can learn more about mail stream blocks [here](#).

**End User complaints:** Spam complaints made about the mailing.

**Recipients remaining:** The number of recipients for a mailing that are current pending in the Active Recipients queue. These users may not have been attempted yet, could be in retry due to transient delivery failures, or could be inactive due to a block by the destination ISP.

## Opens

### Unique Opens

Represents the number of recipients who are known to have opened a message. Records the first open for a recipient, and disregards further opens.

### Total opens

## Clickthroughs

A clickthrough is the action of clicking an ad element and causing a redirect to another web page.

### Unique Clickthroughs

Records the first clickthrough for a recipient, and disregards further clickthroughs.

### Total Clickthroughs

## Clickstreams

A clickstream is a record of a user's activity on the Internet, including every Web site and every page of every Web site that the user visits, how long the user was on a page or site, in what order the pages were visited, any newsgroups that the user participates in and even the e-mail addresses of mail that the user sends and receives.

**Unique page hits:** The number of unique visitors to a page (e.g. if someone visits the same page three times in quick succession, it only counts as one unique page hit)

**Total page hits:** the number of times a page was requested from the server.

### Conversion Pipeline

A graphic representation of the number of messages sent vs. how many were actually received by the recipients.

### Membership Changes

**Subscribes:** The number of new list members.

**Unsubscribes:** The number of members who left the list.

### Purchases

**Purchases:** The number of hits for your [purchase tag](#). A purchase tag can have different quantities.

**Units sold:** Actual number of units sold.

**Example:** Your purchase tag has a quantity of "3." There are five hits on the tag.

Purchases = 5

Units sold = 15 (5 x 3)

**Revenue:** The amount of revenue generated.

### Top Clickthroughs, by URL

The URLs within your email that generated the most clicks.

### Export

#### To export the overview information in a report

Under Export, click the button for the report type you want.



**CSV File Report:** Saves the information in CSV format (comma-separated) which can be read by spreadsheet program like Excel.

**XML File Report:** Opens a new browser window and displays the information in XML format.

# Reports: Delivery Statistics

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Delivery Statistics tells you the progress of your mailings, and how successful they have been.

For a complete listing of all reports, see the [Map](#) on the Reports page in the ListManager web interface.

## Delivery Table

A chart of recent deliveries for this list, and how successful they have been. Click on the date created to view a chart of mailing counts over time.

The delivery table is an overview of the success and failure rates of your recent mailings.

## Finding a Mailing

### To narrow the Delivery Table down to specific mailings

1. Click the **Mailing Type** box, and then select the category you want. This option acts as a filter for the Delivery Table; only items that fit the mailing type you selected will be displayed regardless of the other options you choose.
2. Click the View List button for the **List(s)** box, and then click the site or list you want.



3. Click the Calendar Popup button for the **From** and then choose a start date.



4. Click the Calendar Popup button for the **To** box and then choose an end date.

Only messages delivered in the range you specified will be displayed.

5. Click the **Go** button.

Twenty mailings for the list are displayed at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of mailings at a time.

You can change the sorting order of the mailings by clicking the up or down triangles next to Mailing Name, Total, Attempted %, Completed %, Success %, and Created date. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty mailings, **Previous** to see the last twenty.

The sort options are:



**Mailing Name**

The name you have given this mailing. If you click the mailing name link, you will be taken to the [Reports: Mailings: View Mailing: Message Body](#) page, where the actual mailing text will be displayed.

**Total**

The total number of recipients that ListManager is trying to send to. To view details about the mailing recipients, click the number to go to the [Reports: Mailings: View Mailing: Recipients](#) page.

**Attempted %**

The percentage of recipients attempted at least once. Click the number to see the "Attempted and completed count" chart for that mailing.

**Completed %**

The percentage of recipients for which the mailing attempt(s) are considered completed. This includes successful and failed deliveries, expired mailings, mailmerge skips, and mailmerge aborts. Click the number to see the "Attempted and completed count" chart for that mailing.

**Success%**

The percentage of the total recipients that ListManager has successfully delivered to. Click the number to see the "Success and failure %" chart.

**Fail %**

The percentage of the total recipients that ListManager has failed to delivered to. Click the number to see the "Success and failure %" chart.

**Complaint%**

The percentage of mail that generated a complaint. Click the number to see the "Complaints by Domain" table.

**Created**

The date the mailing was created. Click the date next to a mailing in the Created column to see the "Mailings count over time" chart.

**Viewing a Mailing**

To view a mailing, click on the mailing name. You will be taken to the [Reports: Mailings: View Mailing: Message Body](#) page, where you can view the mailing, the recipients, the log and where it is in the queue.

**Seeing the Recipients**

To see information about the total recipients, recipient details, who has been successfully sent to, and information about opens, clickthroughs and clickstream, click on the number next to a mailing in the **Total** column. You will be taken to the [Reports: Mailing Reports: View Mailing: Recipients](#) screen.

**Download as a File**

Click the disk icon to download your delivery statistics in CSV format.



This file can be opened and read using Excel and other programs.

## Reports: Tracking Statistics

---

Tracking statistics tell you how many people have opened your message, clicked on a tracked URL, or who have gone from one of your mailings through to other pages on your Web site.

In order to have statistics about opens, you must set Track Opens to Yes in [Mailings: New Mailing: Tracking](#). To have statistics about clickthroughs, you must [insert clickable URLs](#) while making content.

If you want to track clickstreams, you'll need to [create a Clickstream Tag](#), and put it on every page you'd like to track on your Web site.

### Tracking Summary

This page provides an overview of clickthroughs, opens and clickstreams.

### Finding a Mailing

#### To narrow the Tracking Summary Table down to specific mailings

1. Click the **Mailing Type** box, and then select the category you want. This option acts as a filter for the Delivery Table; only items that fit the mailing type you selected will be displayed regardless of the other options you choose.
2. Click the View List button for the **List(s)** box, and then click the site or list you want.



3. Click the Calendar Popup button for the **From** and then choose a start date.



4. Click the Calendar Popup button for the **To** box and then choose an end date.

Only messages delivered in the range you specified will be displayed.

5. Click the **Go** button.

The sort options are:

**ID**

The ID number ListManager has assigned this mailing.

### **Mailing Name**

The name you have given this mailing. Click on the mailing name to be taken to the [Reports: Mailings: View Mailing](#) screen, where you can view the mailing, the recipients, the log and where it is in the queue.

### **Sent #**

The number of recipients ListManager actually delivered messages to. Click on the number next to a mailing in the Sent column. You will be taken to the [Reports: Mailing Reports: View Mailing: Recipients](#) screen.

### **Open #**

The number of unique recipients who opened the message using an email client which can read HTML. If a recipient opened the message in two different clients, or with a client and a web browser, only one open will be registered.

If a clickthrough is registered for a recipient without a registered open (as occurs when HTML images are suppressed), an open is recorded for that recipient.

Click on this number to view those who opened the message. You will be taken to a page which will display the time the message was opened, and the email address and name of the recipient who opened it. You may download the list of those who opened the message by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

From this page, you may view a chart that shows opens over time. In addition, you may also create a segment of those who opened a message so you can target later mailings to those people.

### **Open %**

The percentage of unique recipients who opened the message using an email client which can read HTML.

Click on this percentage to view those who opened the message. You will be taken to a page which will display the time the message was opened, and the email address and name of the recipient who opened it. You may download the list of those who opened the message by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

From this page, you may view a chart that shows opens over time. In addition, you may also create a segment of those who opened a message so you can target later mailings to those people.

### **CT #**

The number of unique recipients who clicked on at least one trackable URL (unique clickers). This number may be greater than the number of opens if some recipients have HTML images disabled.

Click on the number to be taken to a page which will display the time the link was clicked, the email address and name of the recipient who clicked, and their TCP/IP address. For each click, you will also see the URL, URL Name and Group. You may download the list of those who clicked on a link by clicking on the disk

icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

From this page, you may view a chart that shows clickthroughs over time. In addition, you may also create a segment of those who clicked on links so you can target later mailings to those people.

**CT %**

The percentage of unique clickthrough hits versus recipients.

Click on the percentage to be taken to a page which will display the time the link was clicked, the email address and name of the recipient who clicked, and their TCP/IP address. For each click, you will also see the URL, URL Name and Group. You may download the list of those who clicked on a link by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

From this page, you may view a chart that shows clickthroughs over time. In addition, you may also create a segment of those who clicked on links so you can target later mailings to those people.

**CS #**

The number of unique recipients who have visited at least one of your web pages. If you want to track clickstreams, you'll need to [create a Clickstream Tag](#), and put it on every page you'd like to track on your Web site.

To view Offline events, click on the CS#. For more information on offline events, see [Utilities: Other: Offline Events](#).

If a recipient receives your message and goes to your Web site directly without clicking on a trackable URL, the clickstream may not be recorded (depending on the recipient's email client settings).

Click on the number in one of the CS columns next to a mailing to see all the recipients who went to other pages on your Web site. You will be taken to a page which will display the time the web page was visited, the page visited, and the email address and name of the recipient who visited. You may download the list of those who clicked on a link by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

You may also create a segment of those who visited other pages on your Web site so you can target later mailings to those people.

**CS %**

The percentage of unique click stream hits versus recipients.

**Created**

The date the mailing was created.

**Download as a File**

Click on the disk icon to download your tracking statistics in CSV format.



This file can be opened and read using Excel and other programs.

## Opens

Charts of open rates, for individual mailings, lists, or all your lists. Includes charts on unique, total, aggregate and estimated opens.

### Unique Opens

Represents the number of recipients who are known to have opened a message. Records the first open or clickthrough for a recipient, and disregards further opens.

### Total Opens

**Represents the total number of opens registered for a message. If a clickthrough is registered for a recipient, but no opens, a single open is recorded for that clickthrough.**

### Estimated Opens

Represents the estimated number of unique opens for the message. This figure is calculated by dividing the unique opens by the total number of recipients detected to have HTML capability in the past times 100 to create a percentage, and then applying that percentage to the entire list to include recipients who have not been detected to have HTML capability.

For example, if a message was sent to 100 recipients with 25 unique opens and 40 recipients known to have HTML capability:  $(25/40)*100=62.5\%$  of known HTML readers opened the message. That percentage is applied to the entire list, so there would be 62.5 estimated opens when there were 25 unique detected opens.

## Clickthroughs

Charts of clickthrough rates, for individual mailings, lists, or all your lists. Includes charts on unique, total, aggregate and estimated clickthroughs.

## Forwards

Charts of forwarding rates, for individual mailings, lists, or all your lists. Includes charts on most forwarded mailings, who forwarded them, and forwards over time. Note that forwarding information is also displayed on the [Member history](#) page for each member.

Note that on the "List Forwarding Detail" page, the Forwards number you see on the left is the number of unique TCP/IP addresses each person has forwarded at least one message to. If two different messages were forwarded to the same TCP/IP address, this page when then only show 1. Therefore these are "unique forwards". To see forwarding details, click on this number. What you now see are all the forwards, regardless of the TCP/IP addresses involved. So if there were 8 unique forwards, and you see a list of 9, that means that one of the TCP/IP addresses received a mailing twice.

The "Mailing Forwarding Detail" page offers more detail regarding the forwards of individual mailings. The date and title of the mailing, how many recipients it was sent to, and the number of forwards for each is seen. In addition, a percentage of number sent which was forwarded is displayed. For example, if it was sent to 100 recipients, and forwarded only once, it will display 1%.

Both the List Forwarding Details and the Mailing Forwarding Details can be downloaded as a CSV file for further analysis.

### Unsubscribes

Chart of unsubscribes by mailing.

### Mailing Summary

Chart over time total sent, opens and clickthroughs for a mailing you select.

## Using the Map Report

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After you send a mailing, you can view the Map Report to see a breakdown of results according to state or province. For example, let's say you do a mailing where three members live in New York. When you open the Map Report, it looks like this:



As you can see, the "1" graphic points to New York State. To see cumulative statistics on all mail sent to that state, move the pointer over the "1" graphic. A popup appears and displays the statistics:



In order for the Map Report to work, each member must have the following two demographics:

Country\_  
State\_Province\_

**NOTE** ListManager will only support a 3-character country code and 2-character state/province.

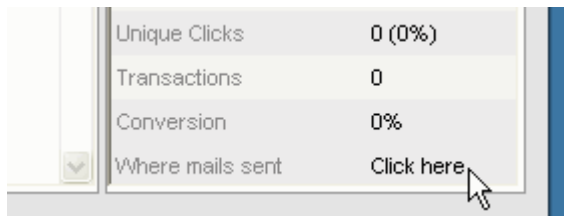
**Important** These names must be exact. If, for example, you already have a "Country" demographic but it doesn't end with an underscore, the Map Report will not work.

#### To add the necessary demographics to the members\_ table

1. In the left Navigation bar, click **Utilities : Administration : Server : Database : Add/Remove Member Columns : Add Column Wizard**.
2. In the **Description** column under the **Location** sub-section, select **Country** and choose the three-character string - char(3) for the datatype and **State/Province** and choose the two character string - char(2) for the datatype.
3. Click **OK**.

#### To view the Map Report for a mailing

1. In the left Navigation bar, click **Home**.
2. Under **Mailing Name**, click the mailing you want.
3. In the lower right corner next to **Where mails sent**, click **Click here**.



**NOTE** After you add the necessary demographics, the Map Report becomes available for all mailings, including past ones.

## CSV Files -- Overview

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This page allows you to import email addresses from a CSV file.

Email addresses which are already members can either be skipped or updated with new data (i.e. demographic information), so importing members can be used as a way of updating current members with additional information.

A CSV file has the information you would like imported in a CSV (comma separated values) format. The first row of the file tells ListManager which field the data in each column should be imported into. For example:

```
EmailAddr ,FullName ,Company,Phone  
bob@example.com,Bob Shelby,Shelby Corp.,555-555-5555
```

In this example, EmailAddr\_ and FullName\_ correspond to the default database fields in the members\_ table for email addresses and full names.

Additional fields called "Company" and "Phone" have been added to this members\_ table, so this information can also be imported into each member's record. (These fields

are not provided by default; you will need to add them to your members\_ table if you would like to store this information).

The "EmailAddr\_" column name is required. You may add other data if you like. Some default members\_ table fields which you may want to include in your import are:

## EmailAdvisor

### Reports: EmailAdvisor

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EmailAdvisor™ is a hosted service (ASP) that lets you monitor deliverability in real time. It also allows you to preview how messages will appear in over 30 popular email clients, as well as see where they are being blocked as spam or filtered into bulk folders.

#### How it Works

When you sign up for EmailAdvisor you [configure](#) ListManager with the login name and password for your account.

When you send a mailing, you'll specify which audits you'd like to run on the [Mailings: New Mailing: Tracking](#) tab, or when you [save and test](#) your mailing.

Then, select the report you'd like to view from the EmailAdvisor tab. When results are posted, you'll be able to view the reports

#### EmailAdvisor Reports

EmailAdvisor has five reports:

1. **Inbox Snapshot** captures what your message looks like in more than forty email clients. It shows you what the message looks like both in the preview and main message panes, with and without images. Inbox Snapshot also includes a spell check, HTML validator and link validator to ensure that your message looks right.
2. **Blacklist Monitor** checks the all the domains and IP addresses in your message, including those contained in your message content, and sees if any of them are listed in any of over 300 Internet blacklists.
3. **Content Analyzer** tests your campaign against thirty spam filters, and shows you what elements of your message make it prone to be filtered as spam.
4. **ISP Status** checks for email delays at forty US and European ISPs. You can see if your delivery delays are due to ISP problems or something about your message.
5. **Delivery Monitor** checks if the message has been received at more than forty ISPs and email providers, and if so, whether it reached the main mailbox or the bulk folder. It can also show if there have been changes in deliverability during the course of your campaign.

### Using EmailAdvisor

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When you sign up for the EmailAdvisor service, you'll receive an email message with your login name and password, and the "From:" email address your messages will have.

## Configuring EmailAdvisor

To use EmailAdvisor, you must first subscribe to the service, and enter your configuration information:

1. In the left Navigation bar, click **Reports: EmailAdvisor**.
2. Click **Configuration Wizard**.
3. Enter your **Customer Name**, **User Name**, and **Password**.
4. Select which lists you'd like to use the EmailAdvisor service for, or select "Entire Server".
5. Click **save**. EmailAdvisor is now configured, and will be available when you create mailings.

## Testing a Mailing

To test a mailing using EmailAdvisor before sending it to your list:

1. Create your mailing as usual in Mailings.
2. When completed, click *save and test*.
3. Under **EmailAdvisor Service**, specify which audits you'd like to run for this test.
4. Click *ok*. You'll be able to view the EmailAdvisor reports under the EmailAdvisor main tab.

## Auditing a Mailing

To audit a mailing during its actual send:

1. Click the **Mailings**main tab.
2. Click **New Mailing**.
3. Compose your message as usual on the **Message** tab.
4. Click the **Deliverability**tab.
5. Under **EmailAdvisor Service**, specify which audits you'd like to run for this mailing.
6. When you are done composing your mailing, click **save**. You'll be able to view the EmailAdvisor reports under the EmailAdvisor main tab.

## When Should I Audit?

We recommend you perform at least two audits of every email campaign:

1. Audit your message before sending it to your list, so you can resolve any problems with the message's appearance or content that may cause it to be filtered.
2. Audit your message when you send it to your email campaign, so you can identify and resolve any delivery problems as they occur.

**NOTE** ISPs may change how they filter your mail as you send out your campaign, so delivery from a test run is not a guarantee of delivery when sending out the actual campaign. If the audit addresses are distributed evenly throughout your list, Delivery Monitor can show success rates at the beginning, middle and end of your send.

# Viewing EmailAdvisor Reports

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After sending a mailing with EmailAdvisor enabled, In the left Navigation bar, click **Reports: EmailAdvisor**, and select which report you'd like to view.

Note: EmailAdvisor reports are best viewed using Windows Internet Explorer. To properly view the reports, you may need to enable third party cookies for the domain *emailadvisor.lyris.net*.

## To enable third party cookies in Internet Explorer

1. Click **Tools**.
2. Select **Internet Options**.
3. Select the **Security** tab.
4. Click **Trusted Sites**.
5. Click the **Sites** button.
6. Enter *emailadvisor.lyris.net*.
7. Click **Add**.

## Reports Table

The reports table display the following:

### **Send Date**

The date the message was sent. Click the send date to view Inbox Snapshot reports for this message.

### **Mailing Name**

The name assigned to this mailing.

### **Subject**

The subject line of the mailing.

## Report Options

You have the following options for each mailing:

### *view report*

Connect to EmailAdvisor to view reports for this mailing.

### *view mailing*

View the mailing in Utilities: Mailings: Mail Queues: Outgoing.

### *delete*

Delete this report for this mailing. Other reports and the mailing itself will not be deleted.

# Reports: EmailAdvisor: Inbox Snapshot

---

Inbox Snapshot captures what your message looks like in more than forty email clients. It shows you what the message looks like both in the preview and main message panes, with and without images. Inbox Snapshot also includes a spell check, HTML validator and link validator to ensure that your message looks right.

## Audit Information

### From Address

The From: address of the message.

### Subject

The subject of the message.

### Date Sent

The date the send was started, Eastern Standard Time.

### Time Sent (EST)

The time the send was started, Eastern Standard Time.

### Message Size

The total size of the message, in bytes. Note that the size includes header and encoding information that may not be visible in an email client.

## Snapshot Issues

A list of the issues this message has.

### Inbox Preview Issues

The number of issues found when reviewing the Inbox Previews.

### Possible HTML Issues

The number of potential HTML code problems. Problems with the HTML code may cause the message to render incorrectly in some email clients, or to be filtered as spam.

### Possible Spelling Issues

The number of spelling errors found by the Spelling Check.

### Link Issues

The number of dead links found.

### Total Snapshot Issues

The total number of issues found for this message.

## Inbox Preview Report

Click to be taken to the Inbox Preview for this message, where you will be able to view the message in various email clients and be able to accept or reject them.



## View Raw Message

Click to see what the message looks like as sent. This view will show all the code, including message headers and boundaries.

### View Message in Browser






Click to view the message in your web browser. Keep in mind that the message may look very different when viewed in email clients.

### Inbox Preview Report



The Inbox Preview Report displays a summary of the Inbox Previews viewed, accepted or rejected. Click  to expand the view and see all results; click  to hide them.

#### Status Icon

A colored icon indicating the status for each view. The possible statuses are:

	Ready, but not viewed
	Viewed
	Accepted
	Rejected
	Error



#### Client

The name of the email client (e.g., Outlook). Click  to expand the view and see results for all possible views; click  to hide them.

#### Comment

Any comment about this view. Comments may be added when rejecting a proof in Inbox Preview.

### Link Validation

Inbox Snapshot checks all the URLs in your message to ensure they are valid and working correctly. Click  to expand the view and see all results; click  to hide them.

#### Link

The URL tested for its validity.

#### Status

The validity of this URL. The statuses are:

	Valid
	Invalid

#### Type

The type of link: image/gif, text/html or unknown.



#### Size

The size in bytes of the download link.

**Description**

A description of the problem found with the link.

**HTML Validation**

The HTML Validator report analyzes the HTML content of the message and advises of any problems with the HTML. Some email providers filter messages that contain HTML errors. Click  to expand the view and see all results; click  to hide them.



**Line(s)**

The line number(s) where the potential problem was detected.

**Issue**

Any HTML code that may cause problems for some recipients; for example, Internet Explorer features that will not render properly in Netscape. The message is tested against the HTML 1.1 specification.

**Spelling Check**

This report shows suspected misspelled words and suggests corrected spellings. Note that the spell check results will not identify words that are spelled correctly but are incorrect grammatically. Click  to expand the view and see all results; click  to hide them.

**Misspelled Word**

The word identified as misspelled.

**Location**

Where in the message the word was found (subject or body).

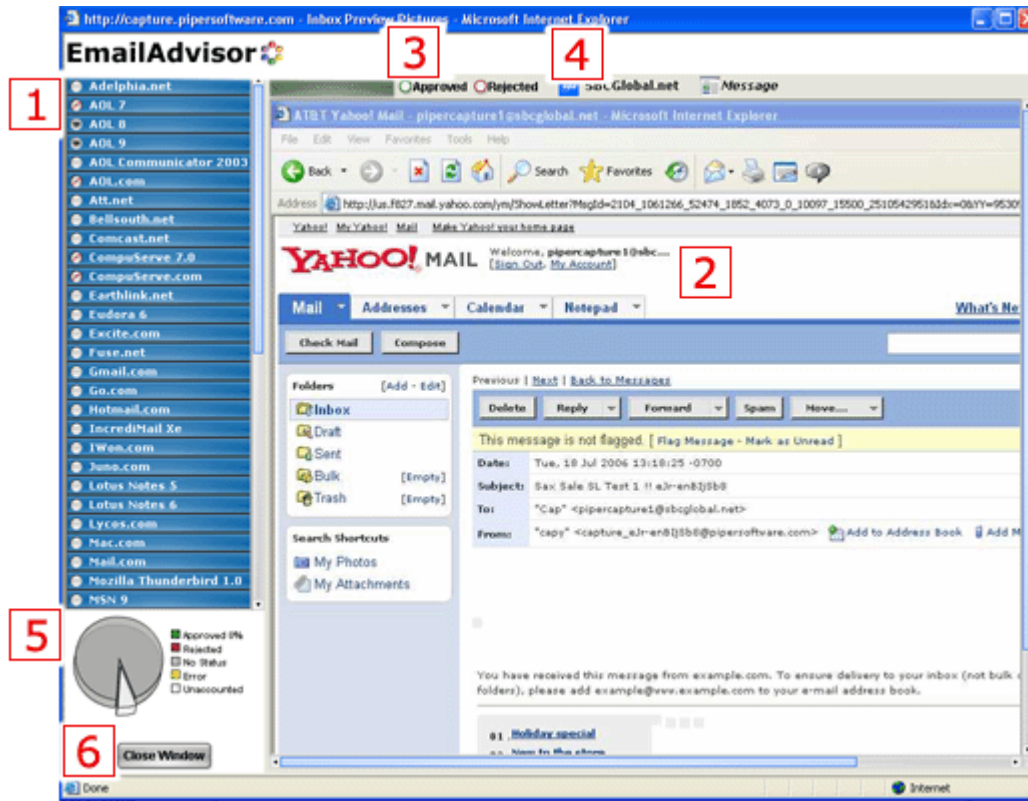
**Suggestions**

Suggested corrected spellings for the misspelled word.

## Reports: EmailAdvisor: Inbox Preview




---

Inbox Preview displays a screenshot of your message like in nearly forty email clients. You may approve or reject each proof, and add comments.






1. Selects which email client to view the message in. Some clients (e.g., Outlook) may have several views.

The color indicator icon for each client shows whether the view for that client is available, and whether it has been viewed.

-  Not viewed
-  Viewed
-  Image not available

When viewing a message, you may select an icon to approve or reject the proof, or to report a QuickProofs error in rendering the message for that client.

-  Approved
-  Rejected
-  QuickProofs error

In the case of a rejection or error, you may add optional comments about the problem. The status you assign, along with any comments, will be visible in the [Inbox Snapshot Report](#).

2. A screenshot of the message rendered in the client selected. Depending on the size of the image, you may be able to scroll to see more of the message.

3. Select whether to approve or reject the proof. After assigning a status, the next proof will be automatically loaded for your review.
4. Displays the email client, and the view. Some clients may have several views--e.g., a preview, or a view without images displayed.
5. A piechart of the review results thus far.
6. Click Close Window to return to the report.

## Reports: EmailAdvisor: Blacklist Reports

---

Blacklist Monitor analyzes all of the domains and IP addresses in your message, including those in URLs included in the content of the message. It then checks more than 300 Internet blacklists to see if any of them are listed. If they are, some ISPs may block your message.

### Audit Information

**From Address**

The From: address of the message.

**Subject**

The subject of the message.

**Date Sent**

The date the send was started, Eastern Standard Time.

**Time Sent (EST)**

The time the send was started, Eastern Standard Time.

### Blacklisted Items

The total number of blacklists hit. Every domain in the message is resolved to its TCP/IP address, and then tested against hundreds of blacklists. The same IP address may be blacklisted on several blacklists, or different IP addresses in the same message may trigger the same blacklists.

### Blacklist Triggered Domains

**Domain Name**

The domain of the link that is blacklisted (e.g., example.com).

**IP Address**

The IP address that is blacklisted (e.g., 192.168.0.1).

**Blacklist Name**

The name of the blacklist the domain or IP address was found on. Click on the blacklist name to find out more information about the blacklist (if available) and

how to remove your IP address from it. In some cases, there is no information because the blacklist owner does not remove IP addresses.

**Reason**

The reason (if given) why the address was blacklisted. Some blacklists do not provide reasons.

## **Reports: EmailAdvisor: Content Analyzer Reports**

Content Analyzer tests your message against thirty spam filters, and shows you what elements of your message make it prone to be filtered as spam.

### **Audit Information**

**From Address**

The From: address of the message.

**Subject**

The subject of the message.

**Date Sent**

The date the send was started, Eastern Standard Time.

**Time Sent (EST)**

The time the send was started, Eastern Standard Time.

**Seed Version**

The seed this message was sent to.

**Message ID**

The message ID of this message.

### **Content Risk Assessment Score**

The likelihood that this message will be filtered as spam. A score of five or higher is generally considered to be spam, but what is considered spam varies by ISP or recipient.

### **View Message in Browser**

Click to view the message audited in a new browser window.

### **EmailAdvisor Content Risk Analysis**

The Risk Analysis breaks down what in the message is most likely to cause the message to be filtered as spam.

**Score**

The number of points assigned due to this problem.

**Significance**

What percentage of points are due to this problem.



**Region**

Where in the message the problem occurs.

**Trigger Description**

A description of what is causing the spam points to be assigned.

## Spam Filters

---

EmailAdvisor analyzes your message against four types of spam filters:

**Client Spam Filter Results**

These filters are installed on recipients' computers, and they filter mail before the mail is received by the recipients' email client.

**Server Spam Filter Results**

These filters are installed on a server that filters mail before the mail is downloaded by recipients.

**ISP Spam Filter Results**

These filters are run by internet service providers and filter mail before it is downloaded by recipients.

**Filter**

The spam filter used for this test. Click  to expand the view and see details; click  to hide them.

**Setting**

The optional setting used when testing your message. Some spam filters have settings that determine how strict they should be in filtering spam.

**Result**

An icon and score (when available) indicating whether the message was considered spam by this filter. The options are:



Considered valid (not spam)



Considered spam



Results not in

**Headers**

When available, allows you to view all of the message headers as received by the filter or ISP.

**Description**






Any details provided by the spam filtering software. Note that many anti-spam programs do not provide reasons why a message has been flagged or rejected as spam.

## Reports: EmailAdvisor: ISP Monitor

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ISP Monitor checks for email delays at major US and European Internet service providers, allowing you to see current mailing conditions. If there are significant delays, you may wish to postpone sending a message to particular domains or to your entire list.

The report displays the name of the ISP, the average length of time it took between the sending of a message and its receipt, and an icon indicating the status:

-  No delays
-  Slight delays (10+ minutes)
-  Moderate delays (30+ minutes)
-  Excessive delays (50+ minutes)
-  Severe delays (2+ hours)

## Reports: EmailAdvisor: Delivery Monitor Reports

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Delivery Monitor checks if the message has been received at more than forty ISPs and email providers, and if so, whether it reached the main mailbox or the bulk folder. It can also show if there have been changes in deliverability during the course of your campaign.

This report shows detailed deliverability information for a particular message. It shows which ISPs accepted or rejected the message, and if accepted whether it was received in the inbox or bulk folder.

### Audit Information

**From Address**

The From: address of the message.

**Subject**

The subject of the message.

**Date Sent**

The date the send was started, Eastern Standard Time.

**Time Sent**

The time the send was started, Eastern Standard Time.

**Seeds**

The seed addresses this message was sent to.

**Message ID**

The message ID of this message.

### Audit Chart

This pie chart summarizes the delivery results.

**% Deliverability**

This percentage of messages was delivered successfully to the inbox.

***n* Delivered to Inbox (%)**

This number of messages was delivered successfully to the inbox.

***n* Have Not Arrived (%)**

This number of messages have not yet arrived.

***n* Are Bulk, Junk, or Spam (%)**

This number of messages have arrived, but have been filtered to a bulk, junk, or spam folder.






**View Message in Browser**

Click to view the message audited in a new browser window.



**Delivery Details**

**Delivery Results Icon**

The icon indicates the delivery results for this message:

-  Received and not considered spam
-  Received and considered spam
-  Not received within average response time
-  Not yet received
-  Newly added ISP

**ISP**

The name of the ISP or email provider. Click  to expand the view and see the results for each seed at this ISP; click  to hide them.

**Seed**

The message seeds for the ISP.

**Location**

Where the message was delivered to; the inbox, or a bulk mail folder.

**Headers**

When available, allows you to view all of the message headers as received by the ISP.

**Location Arrival Time (EST)**

The date and time the message was received at this seed address, Eastern Standard Time.

**Time to Domain**

The length of time it took for the message to be received by the ISP. In some cases, there may be a delay between receipt by the domain and delivery to the inbox.






#### **Time to Location**

The length of time it took for the message to be delivered to its final destination (inbox or bulk folder), in hours:minutes:seconds format.

#### **ISP Status at Time of Send**

The ISP Status displays for email delays at major US and European Internet service providers at the time you are sending, allowing you to compare your results with the sending conditions at the time you were sending.

The report displays the name of the ISP, the average length of time it took between the sending of a message and its receipt, and an icon indicating the status:

-  No delays
-  Slight delays (10+ minutes)
-  Moderate delays (30+ minutes)
-  Excessive delays (50+ minutes)
-  Severe delays (2+ hours)

## Configuration

### Reports: EmailAdvisor: Configuration

---

If you are accessing this screen for the first time, you will be prompted to enter your EmailAdvisor Service login information.

[Learn more](#) about the EmailAdvisor service, or [sign up](#) now to get started.

#### **Customer Name**

The customer name assigned to your account.

#### **User Name**

The first user name you'd like to register.

#### **Password**

The password for this user.

#### **Status**

When *next* is clicked, the status will show if the login was unsuccessful.

# Reports: EmailAdvisor: Configuration: Add New

---

If you are accessing this screen for the first time, you may enter your EmailAdvisor Service login information here.

[Learn more](#) about the EmailAdvisor service, or [sign up](#) now to get started.

## Customer Name

The customer name assigned to this account.

## User Name

The first user name you'd like to register.

## Password

The password for this user.

## Status

When *next* is clicked, the status will show if the login was unsuccessful. If it was successful, you will be taken to a screen to assign which lists belong to this customer.

The next page allows you to edit which lists this customer has access to. By default, the entire server is selected. If you would like a customer to have access to a particular site only, deselect Entire Server and select the site(s) for this customer.

If the customer should have access to specific lists only, click *go next* to Show All Lists, and select the lists the customer should have access to.

## Assign Customer

---

This page assigns lists, sites, or the entire server to the customer. By default, the entire server is selected. To select particular lists or sites, deselect Entire Server, and select the sites or lists this customer should be assigned to. Click *go next* to Show Lists to see all lists on the server.

## Customer ID

The ID number for this customer.

## Customer Name

The customer name assigned to this account.

## User Name

The name of this user.

## Password

The password of this user. This field is not editable.

## Show Lists

Click *go* to show all the lists on the server. You may then select particular lists that should use this customer's information for EmailAdvisor.

## Reports: EmailAdvisor: Configuration: Edit

---

This page allows you to edit which lists this customer has access to. By default, the entire server is selected. If you would like a customer to have access to a particular site only, deselect Entire Server and select the site(s) for this customer.

If the customer should have access to specific lists only, click *go* next to Show All Lists, and select the lists the customer should have access to.

## Troubleshooting

---

### **My Message Does Not Appear in Reports**

- ◆ Make sure you are using the From address or domain you specified when you subscribed to the EmailAdvisor service.
- ◆ If the message is blocked at an ISP, you will not be able to view the results in Inbox Preview.

### **My Browser is complaining about third party cookies when I view the reports**

To properly view the reports, you may need to enable third party cookies for the domain *emailadvisor.lyris.net*. To enable third party cookies in Internet Explorer:

1. Click Tools.
2. Select Internet Options.
3. Select the Security tab.
4. Click Trusted Sites.
5. Click the Sites button.
6. Enter *emailadvisor.lyris.net*.
7. Click Add.

### **The Reports Don't Look Right**

Try using Internet Explorer as your web browser.

If you continue to have problems, contact your account representative or go to:

<http://www.lyris.com/support/emailadvisor>

# All Reports

## Mailings

### Reports: Mailings

---

Reports: Mailings allow you to monitor your mailings' status. They help you to see:

- How many mailings have I sent out?
- How successful have individual mailings been in reaching my members?
- Who has opened or clicked on my mailings?
- Who has referred friends to join my list?

If you click on any member's name or email address, you will be taken to their Member history page. For more information on this, see [Members: Find Members: History](#).

The reports are grouped as follows:

#### [Mailing Overview](#)

An informational page with relevant information about individual mailings or campaigns.

#### [Mailings in Queue Statistics Table](#)

An informational page with relevant information about individual mailings in queue (mailings which are currently running).

#### [Delivery Statistics](#)

Charts about delivery success and failure. Information about the number of recipients, number and percentages of successful deliveries and failures.

#### [Campaign Statistics](#)

Charts about delivery and tracking success of your campaigns.

#### Split Test Statistics

Split Test delivery rates, opens, and click-throughs

#### [Tracking Statistics](#)

Charts on clickthroughs, clickstreams, and opens.

#### [Referral Statistics](#)

A table displaying the success of referral campaigns.

## Reports: Mailing Reports: Mailings in Queue Statistics Table

---

This table tells you the progress of the mailings in your queue, and how successful they have been. The mailings here are for *all* lists, not just the current list. This is a subset of

the data in the [Delivery Statistics](#) table, but displays data *only* for mailings in a queue; that is, those that are currently running and have recipients who have not been delivered to yet.

For a complete listing of all reports, see the [Map](#) on the Reports page in the ListManager web interface.

### **Finding a Mailing**

Twenty mailings for the list are displayed at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of mailings at a time.

You may change the sorting order of the mailings by clicking the up or down triangles next to Mailing Name, Total, Attempted %, Completed %, Success %, and Created date. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty mailings, **Previous** to see the last twenty.

The sort options are:

#### **Mailing Name**

The name you have given this mailing. If you click the mailing name link, you will be taken to the [Reports: Mailings: View Mailing: Message Body](#) page, where the actual mailing text will be displayed.

#### **Total**

The total number of recipients that ListManager is trying to send to. To view details about the mailing recipients, click the number to go to the [Reports: Mailings: View Mailing: Recipients](#) page.

#### **Attempted %**

The percentage of recipients attempted at least once, as the mailing is running. Click the number to see the "Attempted and completed count" chart for that mailing.

#### **Completed %**

The percentage of recipients for which the mailing attempt(s) are considered completed. This includes successful and failed deliveries, expired mailings, mailmerge skips, and mailmerge aborts. Click the number to see the "Attempted and completed count" chart for that mailing.

#### **Success%**

The percentage of the total recipients that ListManager has successfully delivered to. Click the number to see the "Success and failure %" chart.

#### **Created**

The date the mailing was created. Click the date next to a mailing in the Created column to see the "Mailings count over time" chart.

### **Viewing a Mailing**

To view a mailing, click on the mailing name. You will be taken to the [Reports: Mailings: View Mailing: Message Body](#) page, where you can view the mailing, the recipients, the log and where it is in the queue.

### **Seeing the Recipients**



To see information about the total recipients, who has been successfully sent to, and information about opens, clickthroughs and clickstreams, click on the number next to a mailing in the Total column. You will be taken to the [Reports: Mailing Reports: View Mailing: Recipients](#) page.

#### **Download as a File**

Click on the disk icon to download your delivery statistics in CSV format. This file can be opened and read using Excel and other programs.

## **Campaign Statistics**

---

Campaign statistics allow you to compare the results from the selected campaigns in one chart. Mailings may be grouped into campaigns after they have been sent, or can be included in a preexisting campaign when initially created. See [campaigns](#) for more information.

Note that in addition to the campaign reports shown here, you may also show the results for a campaign in any report where you may select to view the results from one or more mailings.

## **Reports: Mailing Reports: Referral Statistics**

---

Referral statistics tell you how many people have referred friends to your list, how many friends they referred, and how many of those who were referred joined. They also show how many of those referred clicked on a tracked URL, or who have gone from one of your mailings through to other pages on your Web site.

In order to have statistics about referrals, you need to include a [referral link](#) in your mailing.

If you want to track clickstreams from referrals, you'll need to [create a Clickstream Tag](#), and put it on every page you'd like to track on your Web site.

#### **Finding a Mailing**

Twenty mailings for the list are displayed in Reports: Mailings: Referral Statistics. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of mailings at a time. Click **Next** to see the next twenty mailings, **Previous** to see the last twenty.

You may change the sorting order of the mailings by clicking the up or down triangles next to ID. By clicking the top triangle, the sort order will be ascending (1-10); clicking the bottom arrow makes the sort order descending (10-1).

The sort options are:

#### **ID**

The ID number ListManager has assigned this mailing.

#### **Mailing**

The name you have given this mailing.

Other columns shown are:

### **Referrers**

The number of members who referred friends to join your list. Click on the number to view the list of referrers. From this page, you may see how many referrals each individual made, and how many of those referred joined the list. You may also create a segment of those who referred others.

### **Friends**

The number of friends referred to your list. For example, one referrer may have referred five friends. Click on the number to list the friends referred to the list. From this page, you may see the time of referral, and the email address of both the referrer and the friend referred to the list. You may also see whether or not the friend joined, and the time they joined.

### **Joiners**

The number of friends referred to your list who actually joined. Click on the number to list those who joined as a result of being referred. From this page, you may see the email address and names of those who joined, and those who referred them. You may also see the time of referral and the time of join. In addition, you may create a segment of those who joined the list.

### **CT #**

The number of trackable URLs that have been clicked in invitations. Click on the number to see a list of those who have clicked on a clickthrough URL. You will be taken to a page that shows the time they clicked the link, and the TCP/IP address and email address of the clicker. You will also be able to see the URL, URL Name and URL Group. In addition, you may create a segment of those who clicked on a link.

### **CS #**

The number of web pages that have been visited by recipients of the invitation. This number may be greater than the number of opens or recipients if you put your Clickstream Tags on multiple pages, or if recipients visit your page multiple times.

If a recipient receives your message and goes to your Web site directly without clicking on a trackable URL, the clickstream may not be recorded (depending on the recipient's email client settings).

### **Opens**

The number of messages that have been opened by recipients of the invitation. Opens can only be recorded for those with HTML capability.

## **Viewing a Mailing**

To view the original mailing that resulted in these referrals, click on the mailing name. You will be taken to the [Reports: Mailings: View Mailing](#) screen, where you can view the mailing, the recipients, the log and where it is in the queue.

## **Seeing Who Clicked on a Tracking URL**

To see all the recipients of invitations who clicked on a tracking URL, click on the number in one of the CT columns next to a mailing. You will be taken to a page which will display the time the link was clicked, the email address and name of the recipient who clicked, and their TCP/IP address. You will also see the URL, URL Name and Group. You may download the list of those who clicked on a link by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

You may also create a segment of those who clicked on links in a message so you can target later mailings to those people.

### **Seeing Who Went to Other Pages on Your Web site (Click Stream)**

To see all the recipients of invitations who went to other pages on your Web site, click on the number in one of the CS columns next to a mailing. You will be taken to a page which will display the time the web page was visited, the page visited, and the email address and name of the recipient who visited. You may download the list of those who clicked on a link by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

You may also create a segment of those who visited other pages on your Web site so you can target later mailings to those people.

If you want to track clickstreams, you'll need to [create a Clickstream Tag](#), and put it on every page you'd like to track on your Web site.

### **Download as a File**

Click on the disk icon to download your referral statistics in CSV format. This file can be opened and read using Excel and other programs.

## **Reports: Mailing Reports: View Mailing**

---

By clicking on the Name in the [Reports: Mailings: Delivery Statistics: Delivery Table](#) page, you will be taken to the Reports: Mailings: Delivery Statistics page.

From this page, you may view the [Message Body](#), [Message Header](#), the [Recipients](#) with clickthrough, clickstream and open information, the [Log](#) of the mailing, and the [Mail Queue](#).

## **Reports: Mailings: View Mailing: Message Body**

---

### **Mailing Name**

The name you've given this mailing. This name is not seen by message recipients.

### **Body**

The body of the message you're sending. If you've created both a text and HTML body for your message, you'll see some encoding that allows email clients to select which version they can open and read. It will start like this:

```
This is a multi-part message in MIME format.
```

```
-----  
Content-Type: text/plain; charset="iso-8859-1"  
Content-Transfer-Encoding: 7bit
```

## Reports: Mailings: View Mailing: Message Header

### Header

The message header will be displayed here. Parts of the header will appear as mail merge tags; the information appropriate for each recipient was merged in when the mailing was sent.

## Reports: Mailings: View Mailing: Recipients

### Total Recipients

The total number of recipients being sent to. The *view recipient details* button opens the [Mailings: Mailing Status: View Outgoing Mailing: Mailing Recipients](#) page, which displays details about the recipients for this mailing. All recipients will be visible, but a filter can be applied by selecting the desired view from the drop-down menu.

From here, the recipients' username, domain, status, send-try count, and next attempt date can be seen. In addition, further detail about the member can be accessed by clicking **History**, which takes you to the [Members: History](#) page.

### Mailing Paused (only displays if manually paused)

Will only be displayed if an administrator manually paused the mailing. Displays the number of recipients affected by this, including those that have not been attempted (0 attempts), or in retry (more than one attempt with a transient failure). For more information on pausing mailings, see [Mailings: View Outgoing Mailing: Mail Queue](#).

The **View Paused** button opens the [Mailings: Mailing Status: View Outgoing Mailing: Mailing Recipients](#) page, with the Paused filter on, so only paused recipients will be immediately visible.

### Mailmerge Abort (only display if there's a scripting error)

Will only be displayed if there is a scripting error in TclMerge and the "errormode" function is set to "abort" or "notify". If this is the case, a Tcl error will cause the mailing to abort. Alternatively, if the Tcl Merge "abort" command is used, a recipient in this status will be created. The error mode function is used as follows:

```
errormode abort  
or
```

```
errormode notify name@example.com
```

The *view aborted* button opens the [Mailings: Mailing Status: View Outgoing Mailing: Mailing Recipients](#) page, with the Aborted filter on, so only aborted recipients will be immediately visible.

### **Not Attempted**

The number of recipients which have not been attempted for delivery yet. The *view not attempted* button opens the [Mailings: Mailing Status: View Outgoing Mailing: Mailing Recipients](#) page, with the Not attempted filter on, so only non-attempted (new) recipients will be immediately visible.

### **Tracked Opens**

The total number and percentage of recipients who opened the message using an email client which can read HTML. If a recipient opened the message in two different clients, or with a client and a web browser, two opens will be registered.

In order to have statistics about opens, you must set Track Opens to Yes when creating a new mailing. See [Mailings: New Mailing: Tracking](#).

To see all the recipients who opened your message using an HTML-capable email client, click on the number next to Tracked Opens. You will be taken to a page which will display the time the message was opened, and the email address and name of the recipient who opened it. You may download the list of those who opened the message by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

### **Tracked click throughs**

The total number and percentage of trackable URLs that have been clicked. This number may be greater than the number of opens or recipients if recipients click on a trackable URL multiple times, or if there are multiple trackable URLs in your message that recipients are clicking on.

To have statistics about clickthroughs, you must [insert clickable URLs](#) when you create [content](#).

To see all the recipients who clicked on a tracking URL, click on the number in next to Tracked Clickthroughs. You will be taken to a page which will display the email address and name of each clicker, and the time they clicked. You may download the list of those who clicked on a link by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

### **Tracked click streams**

The total number of web pages that have been visited by recipients of this message. This number may be greater than the number of opens or recipients if you put your Clickstream Tags on multiple pages, or if recipients visit your page multiple times.

If a recipient receives your message in text format and goes to your Web site directly without clicking on a trackable URL, the clickstream may not be recorded (depending on the recipient's email client settings).

To see all the recipients who went to other pages on your Web site, click on the number next to Tracked Click Streams. You will be taken to a page which will display the time the web page was visited, the page visited, and the email address and name of the recipient who visited. You may download the list of those who clicked on a link by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

### **Create Clickstream Tag**

If you want to track clickstreams, you'll need to create a Clickstream Tag, and put it on every page you'd like to track on your Web site. Clicking on the *create clickstream tag* button takes you to [Utilities: Other: Action Tags: Clickstream Tag](#), where you can create a click stream tag and name it for easy reference.

### **Segment**

Displays the segment(s) that the mailing was sent to.

### **Mail Stream**

Displays the mail stream used for the mailing.

[Mail stream overview](#)

[Creating a new mail stream](#)

### **CSV/XML File Report**

Click on the disk icon to download recipient statistics in CSV or XML format. This file can be opened and read using Excel and other programs.

<b>Field</b>	<b>Description</b>
Title	The title of the mailing
Created	The date that the mailing was created as an outmail record for sending
Mailing ID	The outmail_.MessageID_ value
Total	The total number of recipients
Recipients	
Success	The number of successful recipients
Pending	The pending number of recipients
Not Attempted	The number of recipients not yet attempted
Active	The number of recipients currently receiving mailing
Retry	The number of recipients waiting for mailings who have already been tried but who did not receive due to a transient error
Transient Failure	Temporary failures due to non-permanent SMTP or DNS failures
Permanent Failure	Permanent failures due to permanent SMTP or DNS failures, receipt of a bounce message, invalid email address or failure to retrieve the message body from the database
Expired	The expiration date to send the mailing was reached before all attempts were completed
Paused	The recipient was not sent to because the mailing was paused by an administrator

Mail Merge Skipped	The recipient was not processed due to the skip command in mailmerge
Mail Merge Abort	The recipient was not sent to because the mailing was aborted during mail merging by the abort command
Total Undelivered	The total number of recipients who have been attempted but failed
Opens	The total number of times a message is opened
Unique Opens	The total number of recipients tracked opening a message
Clickthroughs	The total number of tracked clickthroughs for a message
Clickstreams	The total number of tracked clickstreams for a message
URL	All tracked URLs

## Reports: Mailings: View Mailing: Log

---

### Log

The record of all the tasks ListManager has performed in sending out this message. You'll see the dates and times when the message was sent, along with the number of recipients sent to.

## Reports: Mailing Reports: View Mailing: Mail Queue

---

### Priority

The priority of this message.

### ID

The ID number ListManager has assigned this mailing.

### Status

The status of this mailing:

#### New

The message has just started, and is being processed.

#### Pending

The message is currently being sent.

#### Retry

The message is waiting to be resent as a retry.

#### Done

The message has completed sending.

### List Name

The name of the list this message was sent to.

### **Date Created**

The date this mailing was created.

### **Send Attempts Completed**

The number of times this message was resent, and those sends were completed. If the message is new or pending, this value will be zero.

## **Reports: Tracking Statistics**

---

Tracking statistics tell you how many people have opened your message, clicked on a tracked URL, or who have gone from one of your mailings through to other pages on your Web site.

In order to have statistics about opens, you must set Track Opens to Yes in [Mailings: New Mailing: Tracking](#). To have statistics about clickthroughs, you must [insert clickable URLs](#) while making content.

If you want to track clickstreams, you'll need to [create a Clickstream Tag](#), and put it on every page you'd like to track on your Web site.

### **Tracking Summary**

This page provides an overview of clickthroughs, opens and clickstreams.

### **Finding a Mailing**

#### **To narrow the Tracking Summary Table down to specific mailings**

1. Click the **Mailing Type** box, and then select the category you want. This option acts as a filter for the Delivery Table; only items that fit the mailing type you selected will be displayed regardless of the other options you choose.
2. Click the View List button for the **List(s)** box, and then click the site or list you want.



3. Click the Calendar Popup button for the **From** and then choose a start date.



4. Click the Calendar Popup button for the **To** box and then choose an end date.

Only messages delivered in the range you specified will be displayed.



5. Click the **Go** button.

The sort options are:

**ID**

The ID number ListManager has assigned this mailing.

**Mailing Name**

The name you have given this mailing. Click on the mailing name to be taken to the [Reports: Mailings: View Mailing](#) screen, where you can view the mailing, the recipients, the log and where it is in the queue.

**Sent #**

The number of recipients ListManager actually delivered messages to. Click on the number next to a mailing in the Sent column. You will be taken to the [Reports: Mailing Reports: View Mailing: Recipients](#) screen.

**Open #**

The number of unique recipients who opened the message using an email client which can read HTML. If a recipient opened the message in two different clients, or with a client and a web browser, only one open will be registered.

If a clickthrough is registered for a recipient without a registered open (as occurs when HTML images are suppressed), an open is recorded for that recipient.

Click on this number to view those who opened the message. You will be taken to a page which will display the time the message was opened, and the email address and name of the recipient who opened it. You may download the list of those who opened the message by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

From this page, you may view a chart that shows opens over time. In addition, you may also create a segment of those who opened a message so you can target later mailings to those people.

**Open %**

The percentage of unique recipients who opened the message using an email client which can read HTML.

Click on this percentage to view those who opened the message. You will be taken to a page which will display the time the message was opened, and the email address and name of the recipient who opened it. You may download the list of those who opened the message by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

From this page, you may view a chart that shows opens over time. In addition, you may also create a segment of those who opened a message so you can target later mailings to those people.

**CT #**

The number of unique recipients who clicked on at least one trackable URL (unique clickers). This number may be greater than the number of opens if some recipients have HTML images disabled.

Click on the number to be taken to a page which will display the time the link was clicked, the email address and name of the recipient who clicked, and their TCP/IP address. For each click, you will also see the URL, URL Name and Group. You may download the list of those who clicked on a link by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

From this page, you may view a chart that shows clickthroughs over time. In addition, you may also create a segment of those who clicked on links so you can target later mailings to those people.

**CT %**

The percentage of unique clickthrough hits versus recipients.

Click on the percentage to be taken to a page which will display the time the link was clicked, the email address and name of the recipient who clicked, and their TCP/IP address. For each click, you will also see the URL, URL Name and Group. You may download the list of those who clicked on a link by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

From this page, you may view a chart that shows clickthroughs over time. In addition, you may also create a segment of those who clicked on links so you can target later mailings to those people.

**CS #**

The number of unique recipients who have visited at least one of your web pages. If you want to track clickstreams, you'll need to [create a Clickstream Tag](#), and put it on every page you'd like to track on your Web site.

To view Offline events, click on the CS#. For more information on offline events, see [Utilities: Other: Offline Events](#).

If a recipient receives your message and goes to your Web site directly without clicking on a trackable URL, the clickstream may not be recorded (depending on the recipient's email client settings).

Click on the number in one of the CS columns next to a mailing to see all the recipients who went to other pages on your Web site. You will be taken to a page which will display the time the web page was visited, the page visited, and the email address and name of the recipient who visited. You may download the list of those who clicked on a link by clicking on the disk icon. This file will be in CSV format, which may be opened and read using Excel and other programs.

You may also create a segment of those who visited other pages on your Web site so you can target later mailings to those people.

**CS %**

The percentage of unique click stream hits versus recipients.

**Created**

The date the mailing was created.

### **Download as a File**

Click on the disk icon to download your tracking statistics in CSV format.



This file can be opened and read using Excel and other programs.

### **Opens**

Charts of open rates, for individual mailings, lists, or all your lists. Includes charts on unique, total, aggregate and estimated opens.

#### **Unique Opens**

Represents the number of recipients who are known to have opened a message. Records the first open or clickthrough for a recipient, and disregards further opens.

#### **Total Opens**

**Represents the total number of opens registered for a message. If a clickthrough is registered for a recipient, but no opens, a single open is recorded for that clickthrough.**

#### **Estimated Opens**

Represents the estimated number of unique opens for the message. This figure is calculated by dividing the unique opens by the total number of recipients detected to have HTML capability in the past times 100 to create a percentage, and then applying that percentage to the entire list to include recipients who have not been detected to have HTML capability.

For example, if a message was sent to 100 recipients with 25 unique opens and 40 recipients known to have HTML capability:  $(25/40)*100=62.5\%$  of known HTML readers opened the message. That percentage is applied to the entire list, so there would be 62.5 estimated opens when there were 25 unique detected opens.

### **Clickthroughs**

Charts of clickthrough rates, for individual mailings, lists, or all your lists. Includes charts on unique, total, aggregate and estimated clickthroughs.

### **Forwards**

Charts of forwarding rates, for individual mailings, lists, or all your lists. Includes charts on most forwarded mailings, who forwarded them, and forwards over time. Note that forwarding information is also displayed on the [Member history](#) page for each member.

Note that on the "List Forwarding Detail" page, the Forwards number you see on the left is the number of unique TCP/IP addresses each person has forwarded at least one message to. If two different messages were forwarded to the same TCP/IP address, this page when then only show 1. Therefore these are "unique forwards". To see forwarding details, click on this number. What you now see are all the forwards, regardless of the TCP/IP addresses involved. So if there were 8 unique forwards, and you see a list of 9, that means that one of the TCP/IP addresses received a mailing twice.

The "Mailing Forwarding Detail" page offers more detail regarding the forwards of individual mailings. The date and title of the mailing, how many recipients it was sent to, and the number of forwards for each is seen. In addition, a percentage of number sent which was forwarded is displayed. For example, if it was sent to 100 recipients, and forwarded only once, it will display 1%.

Both the List Forwarding Details and the Mailing Forwarding Details can be downloaded as a CSV file for further analysis.

### **Unsubscribes**

Chart of unsubscribes by mailing.

### **Mailing Summary**

Chart over time total sent, opens and clickthroughs for a mailing you select.

## **Members**

### **Reports: Members**

---

The Reports: Members page gives you both general and detailed information about your list's membership. You can learn about subscriber activity for the list—how many people have joined recently? Or for a certain time period?

You can also see what the total membership for your list is, and what their status is—are they receiving mail, or are they unsubscribed or on hold?

The Reports: Members page also display what kinds of members are on your list—are they receiving normal mail, or are they set to receive a digest or no mail? The member kind is important if your list is a discussion list.

You may also get a count of members by domain, and for major domains. Knowing that a large portion of your mailing is going to a particular domain may help you tailor your message for those recipients, or explain why mailings are slow to close out if a particular domain is having trouble that day.

Mail Formats show you a member's formatting preferences - text, HTML, or AOL - and whether a member has HTML reading capability. In order to have statistics about opens, you must set Track Opens to Yes in [Mailings: New Mailing: Tracking](#).

Member counts are displayed in two ways: as tables, or as charts. Most tables may be downloaded as CSV files, which may then be opened using applications such as Excel.

The reports are grouped as follows:

#### [Subscriber Activity](#)

Shows a table of subscription information about your list.

#### [Attribute Reports](#)

Charts about member attributes that affect how or whether they are receiving your mailings.

#### [All Lists Member Count](#)

A chart of the distribution of members across all of your lists.

#### [Domain Reports](#)

Charts about how your membership is distributed across different domains.

#### [Demographic Reports](#)

Charts about demographic values that you have inserted into your members table.

#### [Over-Time Reports](#)

Subscription information about your list over time.

## **Statistical Integrity of Member Counts**

---

It is important to keep in mind that the integrity of the statistics reported by ListManager is highly dependent on two things: 1) your list and server settings, and 2) administrator activity.

The aggressiveness of your purge settings can have an impact on the data reported. Consider a weekly mailing list where members are put on hold after two permanent failures, and are never notified of their hold status. Also consider a "[Purge Held](#)" setting of five days. You look at your Member Counts once a week.

With this configuration in mind, it is conceivable that after a mailing, some percentage of members will be put on hold. Five days later, they will be purged. This all happens between the times you look at reports. In other words, many members have moved from normal status to held status, and have then been deleted. Thus, these purged members are not "new held" members nor are they "new unsubscribed" members when the next report is run—they have effectively disappeared. This will create an effect that the numbers from week to week "don't add up", which can be misleading.

This situation may be remedied by having less aggressive purge settings. Specifically, the purge held setting should be increased to something greater than the report frequency (for weekly reports then, you would want to increase the "purge held" setting to something greater than seven days, thereby preventing members from being put on hold and subsequently deleted prior to the next time you view reports.)

Another situation that leads to the numbers appearing to not add up is administrator activity. Specifically, if an administrator deletes members either using the web interface or via email commands, those members have moved from normal status to a status that is not monitored by the reporting (deleted). In both cases, the illusion is that "normal" members have disappeared. Please keep that in mind when you are analyzing your figures.

## **Reports: Members: Subscriber Activity**

---

The Reports: Members: Subscriber Activity page shows a table of subscription information about your list for the past week by default. To change the length of time for the report or the totals, click *choose dates*. This will adjust the period (date range) seen and the total for the period.

Note that the statistics on this page are affected by how long you keep data. See [Reports: Members](#) for more information.

## Subscriber Activity Table

### Date

The date or range of dates for the subscription information in this row.

### New Members

The number of new subscriptions for the period specified in Date. Click on a number to view the new members for a particular time period. From that page, you may create a [segment](#) of those members, or download the list of new members as a CSV file by clicking on the file icon.

The number of members in this segment may be fewer than is displayed, because the segment will pull only normal members who are set to receive normal — not members who are on hold, unsubscribed, or set to receive a digest. You may include these members as well by changing the settings in [Segments: New/Edit Segment: Boundaries](#).

### Unsubscribes

The number of members who unsubscribed during the period specified by Date. Click on a number to view the unsubscribed members for a particular time period. From that page, you may download the list of unsubscribed members as a CSV file by clicking on the file icon.

### Bad Addresses

The number of members who received a permanent failure message and were put on hold during the period specified by Date. [See Utilities: List Settings: Automatic Maintenance: Error Mail Handling](#) for more information about bad addresses.

Click on a number to view the held members for a particular time period. From that page, you may download the list of held members as a CSV file by clicking on the file icon.

### Net Change

The change in subscriber activity for that date. For instance, if there was one new member added, and one unsubscribe, then the net change would be "0".

### Total for Period

The total for the period for each column will be displayed. The length of the period can be adjusted by clicking the *choose dates* button.

### Grand Totals

The totals for the period including members with no join, unsubscribe, or held date set.

# Attribute Reports

---

How or whether members receive email from your list depends on their member status or kind. If you are detecting HTML capability, you may also know what kind of email format they are capable of reading. The reports in this section show charts and tables about these member attributes.

## Status

A member's status determines whether a member receives mail sent to the list, or if they are unsubscribed or otherwise prevented from receiving normal mail.

The statuses available are:

### Normal

Normal members, who will receive normal mailings to the entire list if their membership kind is set to receive mail.

### Confirm

Members who have not yet confirmed their membership. These members will not receive mail until they have done so.

### Expired

Members whose memberships have expired. These members will not receive mail until their expiration date is advanced to a future date, or erased from their membership record.

### Held

Members who are on hold due to bad email addresses. These members were put on hold because they were undeliverable for the number of times and length of time you specified in your list settings. These members will not receive mail unless they or you change their subscription back to normal.

### Private

Members who have not yet been approved by an administrator to join a private list. These members will not receive mail until an administrator has approved them.

### Referred

Members who have been referred to join the list by a friend, but who have not yet joined.

### Unsub

Members who have unsubscribed from your list. These members will not be delivered to unless they resubscribe to your list.

## Kind

The kind of mail the member has selected to receive from the list. Generally, membership kind is relevant to discussion lists only. The kinds of memberships available are:

### Mail

Members who receive messages as they are contributed.

**Digest**

Members who receive one daily message, with all the contributions for that day.

**Mimedigest**

Members who receive one daily message, with all the contributions for that day, in MIME format. The formatting of the messages will be preserved.

**Index**

Members who receive one daily message with only the subject lines for that day.

**Nomail**

Members who receive no mail from this mailing list.

**Email Format**

The mail format have members been detected to be able to read: Text, AOL or HTML.

In order to have information about text versus HTML, you must set Detect HTML Capability to Yes in [Mailings: New Mailing: Tracking](#). Otherwise, all members will be text or AOL.

Note that ListManager will not automatically send members email in the format they have been detected to receive. To do so, you must create segments based on email format, and then send mailings with that type of content to each segment.

The formats available are:

**Text Message Count**

The number of non-AOL recipients who have not been detected opening a message with HTML.

**AOL Count**

The number of recipients who are AOL customers. AOL users who use AOL 5.0 or earlier cannot receive standard HTML messages.

**HTML Detected Count**

The number of recipients who have been detected to be able to read HTML, and are not AOL members.

## All Lists Member Count

---

This chart displays how members are distributed between your lists. It shows the number of members defined in all lists on the server, and is useful for determining the required license level. To upgrade your license, please contact [sales@lyris.com](mailto:sales@lyris.com).

This chart *only* displays values for lists that have more than 10 members. If you have many lists, those with fewer members may not be displayed.



# Domain Reports

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## Domains Charts

These charts display information about members according to their domain. A domain is everything after the @ sign in an email address (e.g., aol.com). They show how your membership breaks down according to domain, as well as those domains which have more members bouncing, held, unsubscribing or not confirming.

Knowing that a large portion of your mailing is going to a particular domain may help you tailor your message for those recipients, or explain why mailings are slow to close out if a particular domain is having trouble that day.

Checking permanent failures or held members by domain can help you see if a particular ISP is blocking your mail. To confirm, you should have detailed delivery reports mailed to you. Enable these reports by going to [Utilities: List Settings: Basic Information: Reports](#).

## Domain Table

The domain table displays all members by domain.

### Count

The number of members on this list which have email addresses with this domain name:

### Domain Name

Displays the member domain names. Clicking on the domain name takes you to the "Members in a domain" table, where members are listed individually, and their join date, email address, and name can be seen. Clicking the member email address here takes you to the [Members: History](#) page for that member.

## Domains Failing

Displays the domains that we are currently having trouble sending mail to, sorted by importance. These are domains that are resulting in rejection messages when mailed to. Note that, depending on the number of recipients in the mailing, this table may be slow to generate.

From the drop-down menu, select the desired mailing. Click "refresh" to view the current failures for each domain name.

### Domain Name

Displays the member domain names. Clicking on the domain name takes you to the [Rejection Messages](#) page, where any rejection messages sent back from that domain name and saved, will be displayed.

**Score**

The domains are sorted by score (highest to lowest) by default. This score number is achieved by assigning more weight (a higher number) to those domains that have a higher number of recipients. For example, if there are two recipients at example.com and both fail, that is a 100% failure, but has only failed for two potential recipients. This will receive a lower score than if you have 10,000 recipients at aol.com, and 5% of those fail, because this is more damaging and indicates a higher failure overall.

**Total**

Displays the total number of messages sent to each domain.

**Failures**

Displays the number of failed messages for each domain. This will be a subset of the total number sent.

**% Fail**

Displays the % of messages sent to each domain that failed. This is the percentage of failed to total messages attempted.

**Domains Potentially Blocking**

This table displays domains with more than 90% failures, sorted by number of attempted recipients. If a domain is failing more than 90% of the time, there is a high probability that it is blocking your mail. If a domain is blocking you, it may be worth investigating, for instance if a domain has listed you as a spammer. Note that, depending on the number of recipients in the mailing, this table may be slow to generate.

From the drop-down menu, select the desired mailing. Click "refresh" to view the current failures for each domain name.

**Domain Name**

Displays the member domain names. Clicking on the domain name takes you to the [Rejection Messages](#) page, where any rejection messages sent back from that domain name and saved, will be displayed.

**Total**

Displays the number of messages sent to each domain.

**Failures**

Displays the number of failures (transient and permanent) for each domain.

## Demographic Reports

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These charts display members according to additional demographic information you may have about them.

Additional demographic fields may be added to the ListManager members table, either directly in the database or by using the tools in [Utilities: Administration: Server: Database](#).

Once you have added additional fields, you will need to define them in [Utilities: Administration: Server: Database: Demographic Definitions](#) for them to be available when you view these reports.

## Over-Time Reports

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These charts give information about your membership statistics over time—for example, subscribes, unsubscribes, confirmed, or on hold.

These charts can give you general trends about your list's membership. For example, you may find that your rate of unsubscribes peaks after a particular kind of mailing, and so may decide that it's not worth doing that kind of mailing if it means you will be sacrificing so many members.

You may also find studying confirmation rates over time useful, so you may tailor your [confirmation document](#) to encourage more people to confirm joining your list.

Email addresses go bad and are put on hold as a matter of course in running an email list. However, if you find that a large number of email addresses go on hold all at once in these charts, you may investigate ISP or network problems.

## Complaints by Mailing

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This table displays spam complaints made about your mailings. If you have a whitelisting agreement with an ISP and use ListManager's [Autoresponder](#) feature to handle complaints. See [Whitelist Complaint Handling](#) for more details.

### Finding a Mailing

Twenty mailings for the list are displayed at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of mailings at a time.

### Title

The title of the mailing

### # Complaints

The number of complaints for this mailing.

You may change the sorting order of the mailings by clicking the up or down triangles next to **Title** or **Complaints**. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty mailings, **Previous** to see the last twenty.

## Server Performance

### Reports: Server Performance

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These charts display how quickly your ListManager server is delivering mail, and how successfully mail is reaching subscribers. Delivery speed statistics are saved by ListManager every minute, and are saved indefinitely.

Activity is summed by one minute intervals. The charts show how fast ListManager would be sending mail if the number of messages sent in a particular second was sustained for a minute. For example, if ListManager actually sent 100 messages in a particular second, the chart would show that you had achieved a delivery speed of 6000 messages per minute.

Note that this information is only available to those logged in as server administrators. List and site administrators will not be able to see mail speed information.

#### All Mailings in Queue Statistics Table

Displays information about all the mailings in queue on this server. For details on this table, see [Reports: Mailings: Mailings in Queue Statistics Table](#).

#### Charts

See the various charts on server sending speed, send success and failures, simultaneous sends, and kilobytes sent.

The "Server sending speed" charts report instantaneous rates of successful, failed, and total mail sending, extrapolated to per hour rates. If ListManager is being run as a [cluster](#), you will be prompted to select whether you'd like to view the results for the node, cluster, node versus cluster or all nodes.

#### Incoming

View various charts about the status of mail being received by ListManager. These charts show the results of [SPF](#) authentication, if enabled.

#### Blacklists

Server admins have the option to check whether the ListManager IP addresses are blacklisted. For more information on these reports, see [Reports: Blacklists](#).

### Reports: Blacklists

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The Blacklist option is only visible for server administrators. The purpose of this feature is to make sure that your TCP/IP address or hosting name has not been blacklisted by any blacklisting or banning services before you send out your mailings. These services are trying to reduce "spam" email, and will not allow any mail to be delivered from TCP/IP addresses that have been blacklisted in the past. This feature takes you directly to their Web sites, where you can verify that your TCP/IP address or hosting name has not been blacklisted.

You can see which TCP/IP address you are currently sending mail from by looking in Server Settings. For more information on this, see [Utilities: Administration: Server: Server Settings: Network Settings: Deliver Email](#).

The blacklists you may check here are:

- 'DNS Stuff' 150+ TCP/IP Blacklists
- OpenRBL Universal TCP/IP Blacklist
- Sam Spade
- SpamCop
- Usenet Groups TCP/IP Check (for newsgroups)
- Usenet Groups Hostname Check (for newsgroups)

This menu is dynamic, so if additional blacklisting or banning services become available, these will be added to ListManager as necessary. Once you are on the banning service's Web site, your TCP/IP address will automatically be entered for you, and you check to see if it has been banned by anyone.

If you need further assistance or information regarding Blacklists, please click on the "Lyris offers a consulting service" link on the Blacklist menu page, where you can contact Lyris Technologies directly for further information about our services.

## Web Site

### Reports: Purchases

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These charts display information about mailing recipients who purchase . If you want to track visits, you'll need to [create a Purchase Tag](#), and put it on every page you'd like to track on your Web site.

Purchase Tracking is a feature of ListManager Enterprise, and is unavailable for standard or Pro ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Enterprise.

The following types of purchase reports are available:

#### **Number of purchases**

The number of purchases made by your subscribers. These statistics may be viewed per mailing, over time, cumulatively, by join date and by demographic field.

#### **Purchase percentage rate**

The percentage of purchases made by your subscribers. You may view buyers as a percentage of your total membership, those who open, click a link in a mailing and visit your Web site.

#### **Units sold at each purchase price**

Charts analyzing at what purchase price you've made the most sales. These statistics may be viewed per mailing, per list, per demographic, and in a particular price range.

### **Total revenue for each purchase price**

Charts displaying the amount of revenue gained at each purchase price. These statistics are displayed per mailing, per list, over time and by members' join dates.

### **Total revenue**

Charts displaying the total amount of revenue gained by mailing, over time and by demographic.

### **Total revenue by product/SKU**

Charts displaying total revenue or units sold by product or SKU.

## **Interest**

### **Reports: Interest**

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These charts display information about mailing recipients who show interest in your Web site by visiting particular pages. If you want to track interest, you'll need to [create an Interest Tag](#), and put it on every page you'd like to track on your Web site.

Interest Tracking is a feature of ListManager Pro and Enterprise, and is unavailable for standard ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Enterprise.

Interest reports are grouped as follows:

#### **Number of members at Each Interest Stage**

The number of members at each interest stage. Displays statistics about how members are converted into warm or hot leads, and the number of members at each interest stage based on mailing or by list.

#### **Total Interest Points**

Total interest points generated per mailing, list, or over time.

#### **Total interest events**

The number of interest events triggered, by mailing, per list and over time.

#### **Shopping cart abandonment rate**

The number and percentage of members who used shopping cart, but never purchased.

#### **Hot leads**

Members who have shown a particularly high amount of interest, but who have not yet purchased. Hot leads are divided by those who have high interest points, those who have achieved a high interest stage, or who have gone through a number of purchase events without actually purchasing.

### **Time to sale**

The average length of time a particular list or mailing takes to get members to purchase. Also, statistics about how membership duration, or how long a member has been on your list, affects sales.

### **Time to interest**

The average length of time a member is on your list before showing interest by visiting your Web site.

### **Length of sales cycle**

The average length of time a member is on your list, opens a mailing, clicks on a link, or shows interest before purchasing.

## **Surveys**

### **Reports: Surveys**

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Survey results can be viewed and analyzed here. In order for survey results to appear here, the survey form itself must be created, and then be taken by at least one member. To learn how to create survey forms, see [Utilities: Web Forms: Surveys](#).

#### **Finding Survey Results**

Twenty surveys for the list are displayed. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of surveys at a time. Click **Next** to see the next twenty, **Previous** to see the last twenty.

You may change the sorting order of the surveys by clicking the up or down triangles next to Title, Description, Date Updated, and Responses. By clicking the top arrow, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). The sort categories are:

#### **Survey Title**

Displays the survey title, which is the "Internal survey name" entered when creating the survey form. Clicking the survey title takes you to the [Reports: Surveys: Results](#) page.

#### **Survey Description**

Displays the survey description, which is the "Survey name to display" entered when creating the survey form.

#### **Date Updated**

Displays the last date and time when a response was submitted for the survey.

#### **Responses**

Displays the current number of responses to the survey. Clicking on the number of responses takes you to the [Reports: Surveys: Responses Table](#), displaying the

individual responses to the survey. From here, the [Reports: Surveys: Response](#) page can be accessed by clicking the date or the view link for each response.

### **Viewing or Editing Existing Surveys**

To view survey results, click on the survey title or click "view" next to the desired survey title. You will be taken to the [Reports: Surveys: Results](#) page, where survey results can be seen and analyzed.

### **Deleting Survey Responses**

Click **Delete** next to the survey responses you'd like to remove. ListManager will ask you if you're sure before deleting the survey.

### **Download as a File**

Click on the disk icon to download your survey responses in CSV format, which can be read by a program such as Excel.

## **Reports: Surveys: Survey Results**

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View results for each individual survey, including the responses.

### **Survey Name**

Displays the "internal survey name", which is entered when the survey form itself is created. Clicking the name itself takes you to the [Utilities: Web Forms: Surveys: Edit Survey](#) page, where the survey form can be edited.

### **Description**

Displays the "survey name to display", which is entered when the survey form itself is created.

### **Responses**

Displays the number of responses to the survey. Click the number of responses to see [Reports: Surveys: Responses Table](#) page, and "Show Details" to view the [All Answers in Survey](#) page, including the date the responses were submitted, and the IP address they were submitted from.

### **Dates**

Displays the dates and times during which survey responses were received. Clicking the dates will take you to the "Number of survey answers over time" chart, where the total number of survey answers for one survey, over time, are displayed.

### **Used in mailings**

Displays the name of the mailing(s) in which this survey was used. Clicking on the mailing name takes you to the [Reports: Mailings: Mailing Statistics](#) page, where details about the mailing can be viewed, and various mailing charts easily accessed.



## Filter Responses

Determine which responses will be displayed below. If you select an option from the drop-down menu, click the *refresh* button to view the new filtered responses. The filter response options are "Show All", to view all responses; per mailing, to view responses for a particular mailing; for list members; and for non-members who may have taken the survey.

The list member options will depend on your access level. Server administrators will be able to filter responses for all lists, site administrators for the site list(s) that they administer, and list administrators only for the individual list(s) administered by them.

## Survey Questions and Answers

Displays the survey questions and response totals. This will display the number of responses to the survey (not the number of questions answered). For example, if there were 4 users who took the survey, and out of these 4, only 3 answered this particular question, it will display:

```
3 responses, 1 skipped, 75% responding.
```

Click the "Answer detail" link to go to the [Reports: Surveys: Answers to a Single Question](#) page, to see answer details for each question, including the date the answer was submitted, the answer itself, and the TCP/IP number from where it was submitted.

Click "Chart" to see the "Survey answers to a question" chart, which displays the total number of survey responses for each possible answer to this survey question.

# Reports: Surveys: All Answers in Survey

---

All the answers to one particular survey can be seen and analyzed here. This will include all answers submitted by all respondents, for all questions, for the selected survey.

## Finding Survey Answers

Twenty answers to the survey are displayed. To view more than, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of answers at a time. Click **Next** to see the next twenty, **Previous** to see the last twenty.

You may change the sorting order of the answers by clicking the up or down triangles next to Date, ID, Question, Answer, and Responding IP. By clicking the top arrow, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). The sort categories are:

### Date

Displays the date on which the answer was submitted. Clicking on the date takes you to the [Reports: Surveys: Response](#) page, for more details about this particular answer.

### Question

Displays the question which was asked on the survey.

**Answer**

Displays the respondents answer choice for the question. If more than one answer to a question was submitted for questions allowing more than one response, all answers will be displayed, each as a separate entry.

**Responding IP**

Displays the TCP/IP address of the respondent who answered the question.

**Download as a File**

Click on the disk icon to download your survey responses in CSV format, which can be read by a program such as Excel.

## Reports: Surveys: Answers to a Single Question

Displays all the answers to one particular survey question. This is helpful to analyze trends for each question. This page is displayed by clicking "Answer detail" on the [Reports: Surveys: Survey Results](#) page.

**Finding Answers**

Twenty answers to the question are displayed. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of answers at a time. Click **Next** to see the next twenty, **Previous** to see the last twenty.

You may change the sorting order of the surveys by clicking the up or down triangles next to Date, Answer, and TCP/IP. By clicking the top arrow, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). The sort categories are:

**Date**

Displays the date on which the answer was submitted. Clicking on the date link or "view" takes you to the [Reports: Surveys: Response](#) page, where further detail about the response and the member can be accessed.

**Answer**

Displays the response to the question, submitted on that date.

**TCP/IP**

Displays the TCP/IP number of the respondent who answered this question.

**Download as a File**

Click on the disk icon to download the answers in CSV format, which can be read by a program such as Excel.

## Reports: Surveys: Response

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Displays all the individual survey responses for each survey.

### **Survey Name**

Displays the "internal survey name", which is entered when the survey form itself is created. Clicking the name itself takes you to the [Utilities: Web Forms: Surveys: Edit Survey](#) page, where the survey form can be edited.

### **Description**

Displays the "survey name to display", which is entered when the survey form itself is created.

### **Date**

Displays the date and time of the response.

### **TCP/IP Address**

Displays the TCP/IP address from which the response was generated.

### **Member**

Displays the email address of the member who provided this survey response. Clicking the member name takes you to the [Members: History](#) page, where the member's current information and history can be accessed.

### **Mailing**

Displays the name of the mailing(s) in which this survey was used. Clicking on the mailing name takes you to the [Reports: Mailings: Mailing Statistics](#) page, where details about the mailing can be viewed, and various mailing charts easily accessed.

### **Survey Answers**

Displays the survey questions and this member's individual response to these questions. Also displayed is the question orientation, vertical, horizontal, or menu. This is determined when the survey form is created. For more information on this, see [Utilities: Web Forms: Surveys](#).

## Reports: Surveys: Responses Matrix

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This page displays survey questions and the answers provided by respondents.

### **To view fewer or more respondents**

Click **Show fewer** or **Show more**.

### **To go to the next screen or a previous screen**

Click **Previous** or **Next**.

**To search for an email address**

1. In the upper right corner, click the Search icon.



2. In the window that appears, type some or all of the text to search for. When you are finished, click **Search**.

**To download the list in CSV format**

1. Click the disk icon in the upper right corner of the screen.



2. Click **Save**.

Depending on browser settings, you may be prompted to save, or the list might open up in a browser and you can save from there.

## Sales Cycle Map

### Reports: Sales Cycle Map

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The Sales Cycle Map displays an arrangement of key charts and reports based on the normal flow of the sales cycle. These are arranged into **Awareness Reports**, **Interest Reports**, and **Action Reports**:

**To view the Sales Cycle Map**

In the left Navigation bar, go to **Reports : All Reports : Sales Cycle Map**.

**Awareness Reports**

Easy access to Delivery and Member reports.

**Interest Reports**

Easy access to Tracking, Interest analysis, and Time-to-interest reports.

**Action Reports**

Easy access to Purchase analysis reports, Shopping cart analysis reports, Time-to-Sale reports, and Web site analysis reports.

## Maps

### Reports: Maps

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Clicking on [map](#) displays a complete index of all the available charts and reports in an outline form.

## Custom Charts

### Reports: Custom Charts

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ListManager includes a wide variety of charts. If there is a particular chart that you'd like to see that is not included as a default, you may create it in Reports: Custom Charts.

Customer Charts allow you to:

- Select the type of chart you want - pie chart, bar chart, line chart, high/low, etc.
- Select the metrics you'd like to combine - opens as compared to purchases over time, for example.
- Specify the start and stop date for each metric and for the chart as a whole.
- Specify how you'd like to group data—by time interval or by percentage of the data.
- Determine chart labels and background color.

All of your custom charts are displayed in the Reports: Charts page. Click *create new chart* to create a new custom chart.

### Reports: Charts: Essentials

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#### Your Description

Your description of this chart.

#### Displayed Title

The title displayed on your chart.

#### Chart Type

The type of chart you'd like to create. Note that not all chart types make sense for all kinds of data. For example, transient or permanent failure data over time would not display properly for a pie chart. The options are:

- 3D Pie Chart**
- 3D Bar Chart**
- 3D Line Chart**
- 3D High/Low/Close**
- 3D Area Chart**
- Plain Line Chart**
- Plain Area Chart**
- Plain Bar Chart**
- Plain High/Low/Close**

### Metrics to Chart

What statistics should be included in this chart. Click on Add to add metrics to this chart.

## Reports: Charts: Advanced

---

### Y Axis Label

The label for the Y axis.

### Background Color

The chart's background color. By default, the color will be white. Enter the HTML code (e.g., FFFFFFFF) to change the background color.

### Associated With

What list or site this chart is associated with, or whether this chart should be available to all on the server. By default, the chart is associated with the list in which it has been created. You may opt to have the chart associated with a different list, an entire site or an entire server.

### Date Created

The date the chart was created.

### Date Last Modified

The date the chart was last modified.

## Reports: Charts: Add Metric

---

The Add Metric page allows you to select what metric you would like to include in your chart. You must first select the metric group in the drop-down box before selecting a particular metric.

The metric groups are:

**Clickstream** - Recipients who visited particular pages on your Web site.

**Clickthrough** - Mailing recipients who clicked on links in your mailings.

**Forwards** - Mailing recipients who forwarded your mailings.

**Interest** - Interest levels of recipients who visited particular pages on your Web site.

**Mailings** - Delivery success, failure and related statistics.

**Members** - Membership data; what kinds of members are on your list(s).

**Misc** - SQL query charts; only server admins can add metric here, anyone can run it.

**Opens** - Recipients who opened a particular mailing.

**Purchases** - Recipients who purchased after receiving a mailing.

**Server Performance** - Information about how ListManager is running.

Once you have selected a metric, you will be taken to a second page which will ask additional information about charting the particular kind of metric you have selected.

### **Draw**

Select whether to show the Data line, or the Trend line for this metric.

### **End Date**

The ending date for this chart, in YYYY/MM/DD format. Leave blank for today's date.

### **List**

The list to track this metric for.

### **Number of Days**

The number of days to chart. The default is Forever, or all the data available.

### **Mailing**

The events that resulted from the mailing selected here. If you would like to compare events from multiple mailings, you must add each as an additional metric to your chart.

### **Maximum Interest Stage**

The maximum Interest Stage to display. For example, you may want to only display results with an Interest Stage under 90.

### **Maximum Value for Demographic Field**

(Purchases metric only) Display members with this maximum value for the demographic field you select. For example, you may want to only display results for those whose "Children" field is less than 5.

### **Member Demographic**

(Member metric only) Chart members with information for the demographic field you select here. Only demographic fields in the ListManager members\_ table will be available for charting.

### **Minimum Count**

The minimum amount of data to be displayed in your chart. For example, you may want to only display clickthroughs if they are over a certain number.

### **Minimum Interest Stage**

The minimum Interest Stage to display. For example, you may want to only display results with an Interest Stage over 50.

### **Minimum Value for Demographic Field**

(Purchases metric only) Chart members with the minimum value for the demographic field you select. For example, you may want to only display results for those whose "Children" field is greater than 1.

### **Minimum # of Bounces**

(Member metric only) The minimum number of permanent failures to display for this chart.

### **Performance Metric Type**

(Server Performance metric only) The type of server performance data to display for this chart.

### **SQL Query**

(Misc metric only), and only available to server admins. Enter a valid SQL query; an example for the LABEL/COUNT metric would be:

```
SELECT Domain , count(*) as Count FROM members WHERE  
List ='listmanager-discuss' GROUP BY Domain ORDER BY Count  
DESC
```

which displays the number of members per domain.

Note: It is recommended that before you paste your SQL statement into this box, that the statement be tested in the [Run your own SQL Query](#) page, to see if there is an error in the statement. If a faulty statement was entered, this will show you the error, which may be helpful in revising the statement. If a faulty statement is entered in the chart SQL query, you will see the chart displayed as "Sorry, there is no data to chart".

### **Web Page Name**

The name of the web page for this Action Tag.

## **Reports: Charts: Chart**

---

The Chart tab shows you what your chart looks like with the parameters you have established for the chart. Editing the parameters on the other tabs can change the chart.

## **Reports: Charts: Table**

---

This tab displays your results in tabular format based on the parameters you have established for the chart. Editing the parameters on the other tabs can change this table.



# Utilities

## Utilities

---

Utilities allow you to configure and manage your list, site or server, depending on your permissions. You may also create members, automated messages, web forms, and more.

### List Settings

Your lists are created with appropriate settings for the kind of list you selected. If you'd like to fine tune your list, adjust the settings in [Utilities: List Settings](#).

### Web Forms

Web Forms is where [subscribe forms](#), [unsubscribe forms](#), [member profile forms](#), and [referral forms](#) are created and edited. These allow users to join lists, update their profiles, and refer their friends.

### Automated Messages

Automated messages include document content and document associations, which are email messages which are sent out in response to subscriber actions, such as joining a list, confirming their membership, writing to an autoresponder address. These documents typically have information about your list, your organization, etc. In order to have these documents sent out automatically, you must create them first in [Utilities: Automated Messages: Document Associations](#). Automated messages also includes autoresponders, which are email addresses which reply with a specified document. If you are sending announcements or one-way mailings, It's useful to put an autoresponder in the From: field of your message with instructions on how to unsubscribe. Match phrases allow you to automate actions when a specific text string is seen in an incoming email. They edit or reject messages with certain text in them according to your rules.

### Administration

Manage your server, site, lists, or topics from [Utilities: Administration](#). You may also create other administrators here, and manage your database. In addition, [permission groups](#) can be created from here.

### Login Status

Log out of ListManager or login as a different user, switch to a different list, and edit your server administrator account (must have server administrator access).

### Other

[Utilities: Other](#) allows you to create Action Tags, including clickstream, interest or Purchase Tags, and insert them in the HTML of your Web site so you can track visitors. Create a signup page for your list using the Signup Form, and edit clickthrough URL descriptions. Learn more about ListManager and Lyris Technologies by clicking [Utilities: Other: About](#).

# Web Forms

## Utilities: Web Forms

---

Web forms include a variety of forms commonly used in ListManager.

Various types of forms can be created, including [Subscribe Forms](#), [Unsubscribe Forms](#), [Member Profile Forms](#), [Survey Forms](#), and [Referral Forms](#). In addition, [templates](#) for these forms can be created and saved for later use.

For Subscribe and Unsubscribe forms, only the HTML required for the form is created here. This is then inserted (copy-pasted) into your desired web page. The HTML is dynamically created here, but cannot be saved or edited.

Member Profile, Survey, and Referral Forms can be edited, copied, deleted, and reused. They can be inserted into your mailing content with the [Content: Insert URL](#) function.

## New Subscribe Form

### Utilities: Web Forms: New Subscribe Form Overview

---

ListManager makes it easy for you to sign up new members. First, use the New Subscribe Form pages to create subscribe and unsubscribe forms. Edit the HTML generated if you wish. Then, copy the HTML into a page on your Web site, and visitors will be able to sign up for your lists.

[Learn more](#)

### Utilities: Web Forms: New Subscribe Form

---

This page helps you to create a subscription form. Once you are done creating your form, view the HTML and copy it into the web page you'd like to have a subscribe form. For a step-by-step guide to making your subscription form, see [Utilities: Web Forms: New Subscribe Form](#).

**NOTE** If you have changed the name of the server admin to be something other than Admin, this form will not work properly.

Subscribe forms only show the lists that a specific list administrator has rights to.

**NOTE** Your web forms won't work if the host name assigned to ListManager is incorrect. If your form isn't working properly, check the URL to Web Interface in [Utilities: Administration: Sites](#).

**If you are not already on the New Subscribe Form page:** In the left Navigation bar, select [Utilities: Web Forms: New Subscribe Form](#).

### **Ask subscribers for name/Require password**

Select whether you'd like your form to ask for the subscriber's name and a password, and whether these will be required or optional. The defaults you see for the subscribe form are set in [Utilities: List Settings: Discussion Forum Interface: New Subscriber Requirements](#).

**IMPORTANT** As of version 9.2, ListManager started inserting code for password validation into your subscribe form. Any subscribe forms created with ListManager 9.1 or earlier will no longer function. You must update your subscribe form(s) using ListManager 9.2 or later.

### **Confirmation**

Select whether or not you'd like your subscribers to confirm their membership, or what kind of welcome message they should receive. The options are:

#### **Send One Confirmation Message**

One confirmation message will be sent, even if the subscriber subscribes to many lists. The confirmation sent will be from the first list the member subscribed to. By replying to the confirmation message, subscribers will become normal members of all lists to which they have subscribed, and receive a hello message from each. It is strongly recommended you confirm all new memberships to prevent malicious people from signing up others to your lists.

#### **Do Not Confirm and Send Only One Hello**

The subscriber will not be confirmed. A single hello message welcoming subscribers will be sent from the first list subscribed to.

#### **Do Not Confirm and Send a Hello Message for Each List**

The subscriber will not be confirmed. A hello message welcoming subscribers will be sent from every list subscribed to.

#### **Do Not Confirm and Do Not Send a Hello Message**

The subscriber will not be confirmed, and no hello message welcoming the subscriber will be sent.

### **Destination URL (optional)**

The URL subscribers will be taken to after filling out your form. If no URL is specified, they will be taken to a generic page thanking them for subscribing.

**NOTE** Be sure to type the full path. For example, if you want to direct members to the Lyris web site, type:

**<http://www.lyris.com>**

If you leave out the **http://** and only type **www.lyris.com**, ListManager inserts a path to a subscribe subfolder, so the full URL ends up being this:

**http://<servername>/subscribe/www.lyris.com**

### **Append subscribe information to destination URL**

Set if you'd like to append subscribe information along with the URL when the form is passed along. This information includes the name and email address of the subscriber as well as the list name(s) and any demographic data that may be captured.

### **Show Confirming Web Page**

If set to "yes", users will see a ListManager confirmation page after subscribing, informing them that they have successfully subscribed, or if they need to confirm their membership. They will then be taken immediately to the destination URL page if one is set above, otherwise they are taken to a generic "thank you for subscribing" page.

If set to "no", the confirmation page will *not* appear, and the user will be taken directly to the destination URL page (or generic page).

The default for this is set to "yes", and it is recommended that this confirming page be visible (leave set to "yes").

Note that if no **Destination URL** is defined, and **Show confirming web page** is set to "no", then when the subscriber submits the form, it will not redirect anywhere; the subscribe form page will just be refreshed. It is advisable to either set the confirmation page to "yes", enter a destination URL, or both.

### **Lists**

Select the **Lists** that subscribers can join. By default, only the list you are logged into will be displayed. To select more lists, click choose lists. You will be taken to [Utilities: Web Forms: New Subscribe Form: Choose Lists](#). You will only be able to see lists that you are able to access with your administrative rights.

### **Demographics**

By default, no demographic data will be added. To add fields for users to fill in with demographic information, click choose demographics. You will be taken to [Utilities: Web Forms: New Subscribe Form: Choose Demographic Fields](#).

Note that if you request a date field, the user must enter it in one of the following formats:

yyyymmdd  
yyyymmddhhmm  
yyyymmdd hh:mm  
yyyy/mm/dd hh:mm:ss

### **Preview of your form**

The subscribe form you've created will be displayed here. When it looks right, click get HTML. You will be taken to a page which displays the HTML for your form. Copy it and paste it into the HTML for the page you'd like to have your subscription form.

## Utilities: Web Forms: New Subscribe Form: Choose Lists

---

This page displays the lists that are available to you. The list you are logged into is displayed as the chosen list. To select other lists, click on them under Available Lists and click the > button to move them to the Chosen Lists. Only the lists that the specific list administrator has rights to will be shown here. To deselect a list, click on the list name and click the < button to move them to Available Lists. You may use the Ctrl key to select multiple lists at a time.

## Utilities: Web Forms: New Subscribe Form: Choose Demographic Fields

---

This page displays the demographic fields that are available to you in your Members table. To select demographic fields to include in your form, click on them under Available Demographics, and click the > button to move them to the Chosen Demographics. To deselect a demographic field, click on the list name and click the < button to move them to Available Lists. You may use the Ctrl key to select multiple fields at a time.

## New Unsubscribe Form

### Utilities: Web Forms: New Unsubscribe Form

---

This page helps you to create an unsubscribe form. Once you are done creating your form, view the HTML and copy it into the web page you'd like to have a subscribe form. For an overview of unsubscribe forms, see [Utilities: Web Forms: New Subscribe Form Overview](#).

Unsubscribe forms only show the lists that a specific list administrator has rights to.

#### NOTES

- If you have changed the name of the server admin to be something other than Admin, this form will not work properly.
- Your web forms won't work if the host name assigned to ListManager is incorrect. If your form isn't working properly, check the URL to Web Interface in [Utilities: Administration: Sites](#).

#### Email Notification

If set to **yes**, those who unsubscribe will receive an email notifying them whether or not they have unsubscribed successfully. If set to "no", they will not receive this notification.

You may customize the goodbye message by creating a goodbye document in [Content](#) and then selecting it in [Utilities: Automated Messages: Document Associations](#).

### **Confirm**

If set to "yes", those who unsubscribe will be taken to a web page which will ask them if they are sure that they want to unsubscribe. Otherwise, they will be unsubscribed immediately without confirmation.

### **Lists**

Select the **Lists** that subscribers can leave. By default, a member will be unsubscribed from the current list. To select another or multiple lists, click choose lists. You will be taken to [Utilities: Web Forms: New Unsubscribe Form: Choose Specific Lists to Unsubscribe](#). You will only be able to see lists that you are able to access with your administrative rights.

### **(Optional) Destination URL**

The URL members will be taken to after filling out your unsubscribe form or clicking on the unsubscribe URL. If no URL is specified, they will be taken to a generic page telling them they have unsubscribed.

**NOTE** Be sure to type the full path. For example, if you want to direct members to the Lyris web site, type:

**`http://www.lyris.com`**

If you leave out the **`http://`** and only type **`www.lyris.com`**, ListManager inserts a path to a subscribe subfolder, so the full URL ends up being this:

**`http://<servername>/subscribe/www.lyris.com`**

### **Append unsubscribe information to the destination URL**

This option will pass information about the unsubscribing member into the destination URL, potentially to be used by a script. The options are:

- e = Email address.
- id = Member id and character uniquely identifying this member.
- l = Lists, separated by spaces.
- c = Confirm unsubscribe via email. Options are (T)rue or (F)alse.
- n = Send email notification of the unsubscribe. Options are (T)rue or (F)alse.
- u = Destination URL after unsubscribing.
- w = Show page asking unsubscribers to confirm before completing unsubscribe
- a = Append unsubscribe information to destination URL. Options are (T)rue or (F)alse.

### **Show confirming web page**

If set to "yes", users will see a quick confirmation page after unsubscribing, informing them that they have successfully unsubscribed. They will then be taken immediately to the destination URL page if one is set above, otherwise they are taken to a generic "thank you for unsubscribing" page.

If set to "no", the confirmation page will *not* appear, and the user will be taken directly to the destination URL page (or generic page).

The default for this is set to "yes", and it is recommended that this confirming page be visible (leave set to "yes").

Note that if no **Destination URL** is defined, and **Show confirming web page** is set to "no", then when the user saves the unsubscribe form, it will not redirect anywhere; the unsubscribe form page will just be refreshed. It is advisable to either set the confirmation page to "yes", enter a destination URL, or both.

### **Your Unsubscribe URL**

This page can also generate an unsubscribe URL that you can put in your ListManager mailings. Each member receives a unique unsubscribe URL (using their member ID and a checksum character), so members can unsubscribe successfully even if they forward their email to a different account. The checksum character is a security precaution that prevents others from inadvertently or maliciously unsubscribing others by changing the member ID.

Based on the other settings you've selected on this page, you can opt to have members taken to a confirm dialog that will ask them if they are sure they want to unsubscribe, and/or have them sent an email notification that they have been unsubscribed.

### **Preview of your Form**

The unsubscribe form you've created will be displayed here. When it looks right, click *get HTML*. You will be taken to a page which displays the HTML for your form. Copy it and paste it into the HTML for the web page you'd like to have your unsubscribe form.

## **Utilities: Web Forms: New Unsubscribe Form: Choose Specific Lists to Unsubscribe**

---

This page displays the lists that are available to you. Only the lists which are available to the specific list administrator will be displayed here. To select specific lists, click on them under Available Lists and click the > button to move them to the Chosen Lists. To deselect a list, click on the list and click the < button to move them to Available Lists. You may use the Ctrl key to select multiple lists at a time.

## **Member Profile Forms**

### **Utilities: Web Forms: Member Profile Forms**

---

Member profile forms allow list members to see and edit what information ListManager is using for them: the email address, lists subscribed to, and any additional demographic information.

They may be used instead of an unsubscribe form or unsubscribe link to allow members to opt out of lists selectively. They are also useful as a way for members to change their email address or other demographic information stored in ListManager.

Note: the HTML for the form may *not* be embedded in your website; it must be served from the ListManager web server. However, you may edit the HTML of the form to match the look and feel of your website.

Once you have created a member profile form in ListManager, you may link to it, either in your mailings or using a link on your website.

### To create a link to your member profile form

1. In the left Navigation bar, click **Content**, and then click **New Content**.
2. Select either the **Text** or **HTML** tabs.
3. Click **Insert URL**.
4. Select the **Profile** tab.
5. Select the **HTML Profile Form** you'd like to use.
6. Click insert.

The URL that is generated may also be inserted into a form on your website. Here is a sample of the code. Note that the values to pass below are from the URL generated. For example, if the URL generated from the wizard is `http://yourserver.example.com/subscribe/profile?f=4257&id=%%memberidchar%%`, enter the number "4257" for `name="f"`. Example:

```
<form method="post"
action="http://yourserver.example.com/subscribe/profile">
  <b>Edit your member profile</b><p>
  Email Address: <input class="forminput" value="" type="text"
size="20" name="email"><P>
  <!-- UNCOMMENT TO ALWAYS ASK FOR A PASSWORD -- Password: <input
class="forminput" value="" type="password" size="20"
name="pw"><P> -->
  <input type="hidden" name="f" value="4257"><input type="hidden"
name="sublists" value="listname"><input type="submit">
</form>
```

Note: Your web forms won't work if the host name assigned to ListManager is incorrect. If your form isn't working properly, check the URL to Web Interface in [Utilities: Administration: Sites](#).

### Finding Member Profile Forms

From the drop-down menu, select **List**, **Site**, or **Server** member profile forms. Note that the options available here will depend on the access level of the logged in user. Server administrators can see server, site, and list member profile forms. Site administrators can see site and list member profile forms. List administrators can see member profile forms for the lists administered by them.

Twenty member profiles for the list are displayed. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of profile forms at a time. Click **Next** to see the twenty ten profiles, **Previous** to see the last twenty.



You may change the sorting order of the profile forms by clicking the up or down triangles next to Name and Description. By clicking the top arrow, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a).

### Viewing or Editing Existing Member Profile Forms

To view a member profile, click on the profile form title. You will be taken to the [Edit Member Profile Form](#) screen, where you can preview, edit, and save the member profile.

### Copying Member Profile Forms

Click **Copy** next to the profile form you'd like to copy. ListManager will show you the old title and description, and will ask for the new title and description. To copy this member profile form to another list, select another list from the "New list" drop-down menu. In this way, the profile form can be copied and applied to multiple lists. Note that this option is not available for site or server level forms, only list level forms.

Click copy to save the copied profile form. It will then appear on the main member profile list.

### Deleting Member Profile Forms

Click **Delete** next to the profile form you'd like to remove. ListManager will ask you if you're sure before deleting the form.

### Download as a File

Click the disk icon to download the list of forms in CSV format.

## Utilities: Web Forms: Member Profile Forms: New Member Profile Form: Profile

---

### Title

Enter a descriptive **Title** for your member profile. This will not be seen on the Web site when the form is inserted. A title is required in order to save the member profile form.

### Description

Enter a relevant **Description** for your member profile. The description in this field will not be seen on the Web site when the form is inserted. A description is required in order to save the member profile form.

To create a title other than "Your subscription profile" for the form, you will need to edit the HTML directly.

### Form Fields

---

#### Name

Select the **Name** option for the member profile form. A name can either not be asked for at all, or optionally asked for. There is no option to force a user to enter a name.

### Password

Select if you would like to ask for or not ask for a **Password** to access the member profile form. The password will not be displayed when you enter it. If a user is a member of one or more lists requiring a password, the system will not allow this user to access the member profile form unless a valid password is entered. Note that once the member profile form is accessed (using the correct password, if any), then the user is allowed to change the password. In this case, ALL the passwords on the lists that are checked on the profile will be updated to the new password, thus making all checked lists have a consistent password. If the current setting requires a password, it cannot be set to a blank (nonexistent) password. The default option here is **Do not ask for a password**.

### Display list description

If set to "yes", the list description as well as the list name will be displayed on the profile form. If set to "no", only the list name will be displayed. To view and edit list descriptions, see [Utilities: List Settings: Basic Information](#). The default for this is set to "no".

For example, if the list name is "Example List", and the description is "Example Customers Only":

"no" (do not display list description), will display:

```
Example List
```

on the member profile form.

"yes" (display list description) will display:

```
Example List : Example Customers Only
```

### Lists

Select the **Lists** that subscribers can update a member profile for. By default, only the list you are logged into will be displayed. To select more lists, click choose lists. You will be taken to [Utilities: Web Forms: Member Profile Forms: Choose Lists](#). You will only be able to see lists that you are able to access with your administrative rights.

### Demographics

By default, no demographic data will be added. To add fields for users to fill in with demographic information, click choose demographics. You will be taken to [Utilities: Web Forms: Member Profile Forms: Choose Demographic Fields](#).

## Utilities: Web Forms: Member Profile Forms: New Member Profile Form: Advanced

---

Applies To

Select the list, site, or server setting that this member profile form **Applies to**; the level set here determines the access level required to edit the member profile. Because server administrators can set who has the ability to change these forms, the options available here depend on your access level. Server administrators can edit the server, sites, and lists. Site administrators can edit sites and lists, and list administrators only edit the lists accessible to them.

### **Destination URL (Optional)**

After clicking **Save Changes** on the profile form, the user will be taken to the URL specified here. If no URL is specified, they will be taken to a generic page thanking them for entering a member profile.

**NOTE** Be sure to type the full path. For example, if you want to direct members to the Lyris web site, type:

**http://www.lyris.com**

If you leave out the **http://** and only type **www.lyris.com**, ListManager inserts a path to a subscribe subfolder, so the full URL ends up being this:

**http://<servername>/subscribe/www.lyris.com**

### **Show confirming web page**

If set to "yes," users will see a quick confirmation page after creating or editing the member profile, informing them that they were successful. They will then be taken immediately to the destination URL page if one is set above, otherwise they are taken to a generic "thank you" page.

If set to "no," the confirmation page will *not* appear, and the user will be taken directly to the destination URL page (or generic page).

The default for this is set to "yes," and it is recommended that this confirming page be visible (leave set to "yes").

Note that if no destination URL is defined, and **Show confirming web page** is set to "no", then when the user saves the member profile, it will not redirect anywhere; the member profile page will just be refreshed. It is advisable to either set the confirmation page to "yes", enter a destination URL, or both.

## **Utilities: Web Forms: Member Profile Forms: New Member Profile Form: Preview**

---

### **Preview of your form**

The member profile form you've created will be displayed here. When it looks right, click **Save**. Note that the title displayed here will be "Your subscription profile", and not the actual title of the survey, which needs to be edited in the HTML itself.

Once the member profile is saved, you will be taken to a page which displays the HTML for your form. Make any necessary changes to the HTML, and then copy and paste this HTML onto the web page where you would like to have your member profile form.

## Utilities: Web Forms: Member Profile Forms: Choose Lists

---

This page displays the lists that are available to you. The list you are logged into is displayed as the chosen list. To select other lists, click on them under Available Lists and click on the > button to move them to the Chosen Lists. Only the lists that the specific list administrator has rights to will be shown here. To deselect a list, click on it and click on the < button to move them to Available Lists. You may use the Ctrl key to select multiple lists at a time.

## Utilities: Web Forms: Member Profile Forms: Choose Demographic Fields

---

This page displays the demographic fields that are available to you in your Members table. To select demographic fields to include in your form, click on them under Available Demographics, and click on the > button to move them to the Chosen Demographics. To deselect a demographic field, click on it and click on the < button to move them to Available Lists. You may use the Ctrl key to select multiple fields at a time.

## Utilities: Web Forms: Member Profile Forms: Edit Member Profile Form

---

### Title

Edit the profile form **Title**. The title entered here will not be displayed on the Web site containing the profile form.

### Description

Edit the profile form **Description**. The description entered here will not be displayed on the Web site containing the profile form.

### Applies To

Select the list, site, or server that this member profile form **Applies to**. Because server administrators can set who has the ability to change these forms, the options available here depend on your access level. Server administrators can edit member profile forms for the server, sites, and lists. Site administrators can edit member profile forms for sites and lists, and list administrators can only edit the member profile forms for lists accessible to them.

### HTML

Displays the **HTML** originally created for the member profile form. Any changes to the HTML can be made here directly, and once the form is saved, it can then be repasted into your Web site.

#### **Preview button**

Displays what the Member Profile form will look like on your Web site.

## **Survey Forms**

### **Utilities: Web Forms: Surveys**

---

ListManager's surveys are a great way to engage and interact with your readers. ListManager includes an easy survey form builder to create a questionnaire that asks for single, multiple or open-ended responses. A [link to the survey](#) can be included in your mailing to track list members' responses, or you may post the form on your website.

After conducting the survey, view and analyze the results in Reports: Surveys. These results may be published on your website if desired, or shown to survey takers after completing the questionnaire. You may see the overall results for the survey, or [view responses](#) for individual members.

After using a survey, you can [segment](#) on the response. ListManager's dynamic segment clause wizard allows you to target those who respond to a particular question in a specified way, or those who don't respond at all.

The first step in creating and using surveys in ListManager is to create a survey form in Utilities: Web Forms: Surveys. Then, link to this form when building content by clicking *insert url* and selecting the Survey tab.

To track the responses of list members, you must link to ListManager's survey form in your mailing. You may also insert the HTML of the form generated here in your web site to track responses from web site visitors.

The survey form ListManager generates may be edited to match the look and feel of your email publication or website.

You may edit the HTML header and footer (the HTML before and after the actual questions) on the [Utilities: Web Forms: Surveys: New/Edit Survey: Advanced](#) tab. You may also edit the actual survey questions in Utilities: Web Forms: Surveys: New/Edit Survey: Basics.

You may edit the HTML source directly by clicking *Edit Sourc*, but once you edit the source directly, you may not use ListManager's survey form builder to edit the questions further.

**NOTE** Your web forms won't work if the host name assigned to ListManager is incorrect. If your form isn't working properly, check the URL to Web Interface in [Utilities: Administration: Sites](#).

## Creating and Using Surveys

To include a link to a survey in your mailing, you'll first need to make a *survey form*:

1. In the left Navigation bar, click **Utilities**, point to **Web Forms**, and then click **Surveys**.
2. Click create new.
3. Give your survey an Internal survey name and Survey name to display.
4. Click add+next to Questions to ask to add a multiple choice or text entry question.
5. Click preview to see what your form will look like.
6. Save your survey form. You may edit the HTML of your form once it's been created by navigating to Utilities: Web Forms: Surveys, and selecting the form.

Once you've created a survey, insert a *link* to it in your Content:

1. In the left Navigation bar, click **Content**, and then click **New Content**.
2. Select the HTML tab.
3. Click insert url.
4. Select the Survey tab.
5. Select the survey you'd like recipients to answer in the drop down box.
6. Enter the text you'd like recipients to click on to take the survey.
7. Click insert.
8. Continue to create your Content as usual.

A link to your survey will be inserted into your Content. After you've mailed your content, and at least one recipient has taken the survey, you can see the results in Reports: Surveys.

## Finding Survey Forms

From the drop-down menu, select List, Site, or Server survey forms. Note that the options available here will depend on the access level of the logged in user. Server administrators can see server, site, and list survey forms. Site administrators can see site and list survey forms. List administrators can see survey forms for the lists administered by them. The list or site to which the survey applies is displayed next to the survey form description.

Twenty survey forms for the list are displayed. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of survey forms at a time. Click **Next** to see the next twenty, **Previous** to see the last twenty.

You may change the sorting order of the survey forms by clicking the up or down triangles next to Title and Description. By clicking the top arrow, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a).

## Viewing or Editing Existing Survey Forms

To view a survey form, click on the survey form title. You will be taken to the [Utilities: Web Forms: Surveys: Edit Survey](#) page, where you can preview or edit the survey form.

## Copying Survey Forms

Click **Copy** next to the survey form you'd like to copy. ListManager will show you the old title and description, and will ask for the new title and description. To copy this survey form to another list, select another list from the "New list" drop-down menu. In this way, the survey form can be copied and applied to multiple lists. Note that this option is not available for site or server level forms, only list level forms.

Click **Copy** to save the copied survey form. It will then appear on the main survey list.

### **Deleting Survey Forms**

Click **Delete** next to the survey form you'd like to remove. ListManager will ask you if you're sure before deleting the form.

### **Creating New Surveys**

To create a new survey, click the create new button. This will take you to the [Utilities: Web Forms: Surveys: New Survey: Basics](#) page.

### **Download as a File**

Click on the disk icon to download your list of survey forms in CSV format.

## **Utilities: Web Forms: Surveys: New Survey: Basics**

---

### **Internal survey name**

Enter the internal survey name of the survey form, for reference or descriptive purposes only. This name will not be seen on the Web site when the form is inserted. An internal survey name is required in order to save the survey form.

### **Survey name to display**

Enter the display name for the survey, which will be seen on the web form by survey takers. A survey name to display is required to save the survey form.

## **Survey Questions**

---

### **Questions to ask**

Displays the number of questions in the survey, and description of each, including the responses and the question orientation. Click add to be taken to the [Utilities: Web Forms: Surveys: New Survey: Add Survey Question](#) page, where you may create a new question to be added to the survey.

The buttons next to the questions perform the following functions:

**up** - moves the question one position up in the order that it will appear on the survey form. For example, clicking "up" next to question #2 will move that question up one position to become question #1.

**down** - moves the question one position down in the order that it will appear on the survey form. For example, clicking "down" next to question #1 will move that question down one position to become question #2.

**Remove** - deletes the question from the survey.

**Edit** - takes you to the [Edit Survey Question Parameters](#) page, where you can make changes to the question itself.

### Preview

See what the survey looks like. If you'd like to change the questions, create or edit them from the Basics page. If you'd like to change the HTML header and footer, edit them on the Advanced tab. If you'd like to change the HTML source, click *edit source*. Note that once you edit the source, you may not edit the questions using ListManager's survey form wizard.

### edit source

Edit the [source HTML](#) of the survey directly. Note that once you edit the source, you may not edit the questions using ListManager's survey form builder.

### Save

Save the survey, and return to the main Utilities: Surveys menu.

### Cancel

Cancel any changes made, and return to the main Utilities: Surveys menu.

## Utilities: Web Forms: Surveys: New Survey: Advanced

---

### Applies to

Select the list, site, or server setting that this survey form applies to; the level set here determines the access level required to edit the survey form. Server administrators can edit server, sites, and list surveys. Site administrators can edit sites and lists, and list administrators only edit the lists accessible to them.

### Destination URL (optional)

After clicking **Save** on the survey form, the respondent will be taken to the URL specified here. If no URL is specified, respondents will be taken to a generic ListManager page thanking them for taking the survey.

**NOTE** Be sure to type the full path. For example, if you want to direct members to the Lyris web site, type:

**<http://www.lyris.com>**

If you leave out the **http://** and only type **www.lyris.com**, ListManager inserts a path to a subscribe subfolder, so the full URL ends up being this:



<http://<servername>/subscribe/www.lyris.com>

### **Show confirming web page**

If set to *yes* (the default), respondents will see a quick ListManager confirmation page after taking the survey, informing them that they successfully completed the survey. They will then be taken immediately to the destination URL page if one is set; otherwise they are taken to a generic ListManager "thank you" page.

If set to *no*, the confirmation page will *not* appear, and the user will be taken directly to the destination URL page (or generic page).

Note that if no destination URL is defined, and Show confirming web page is set to *no*, then when the user saves the survey, it will not redirect anywhere; the member profile page will just be refreshed. It is advisable to either set the confirmation page to *yes*, enter a destination URL, or both.

### **Show chart of results**

Specifies whether users should see the current results of the survey after successfully completing it. If a destination URL is specified, survey takers will be taken to that page after clicking *ok* on the results page.

The default for this setting is "no", meaning survey takers will not be shown a chart of the survey's results before being taken to a confirming web page or destination URL.

### **Prevent duplicate survey fillout by TCP/IP**

Determines whether duplicate responses will be allowed for the survey coming from the same IP address. This may be important in order to not have survey results skewed due to multiple responses from one IP address, which may throw off the statistical outcome of the survey. To allow duplicate responses, set to "yes". To disallow them, set to "no".

The default for this setting is "no".

### **Prevent duplicate survey fillout by member ID**

Determines whether duplicate responses will be allowed for the survey coming from the same member ID. This may be important in order to not have survey results skewed due to multiple responses from one member, which may throw off the statistical outcome of the survey. To allow duplicate responses, set to "yes". To disallow them, set to "no".

The default for this setting is "yes".

### **Number Questions**

Select "yes" if you would like the questions in your survey to be answered, and "no" if they are to be listed without numbers. The default setting for this is "no".

The default for this setting is "no".

### **Header**

Displays the HTML that is displayed before the survey questions. You may edit the HTML here and still be able to edit the survey questions. If you edit the source directly,

you will no longer be able to edit the survey questions using ListManager's Add/Edit Survey Question wizard.

### **Footer**

Displays the HTML that is displayed after the survey questions. You may edit the HTML here and still be able to edit the survey questions. If you edit the source directly, you will no longer be able to edit the survey questions using ListManager's Add/Edit Survey Question wizard.

### **Preview**

See what the survey looks like. If you'd like to change the questions, create or edit them from the Basics page. If you'd like to change the HTML header and footer, edit them on the Advanced tab. If you'd like to change the HTML source, click edit source. Note that once you edit the source, you may not edit the questions using ListManager's survey form wizard.

### **Edit source**

Edit the [source HTML](#) of the survey directly. Note that once you edit the source, you may not edit the questions using ListManager's survey form builder.

### **Save**

Save the survey, and return to the main Utilities: Surveys menu.

### **Cancel**

Cancel any changes made, and return to the main Utilities: Surveys menu.

## **Utilities: Web Forms: Surveys: New Survey: Preview**

---

### **Preview of Your Form**

The survey form you've created will be displayed here. When it looks right, click **Save**.

Once the survey form is saved, you will be taken to a page which displays the HTML for your survey. Make any necessary changes, and then copy and paste this HTML onto the web page where you would like to have your survey form.

## **Utilities: Web Forms: Surveys: New Survey: Add Survey Question**

---

There are two types of survey questions which can be added to your survey form; multiple-choice and text entry. Click Select next to the desired question type. This takes

you to the [Utilities: Web Forms: Surveys: New Survey: Survey Question Parameters](#) page, where the questions themselves are entered.

Multiple choice questions can have as many choices as necessary, and can be arranged vertically or horizontally. Answers can be required or not required, and can be set to allow multiple answers. In addition, an "other" field can be created for survey takers to enter an option that may not be available in the multiple choice options.

Text entry questions allow a survey taker to fill in a text response to a question. The answer can be required or not required.

## Utilities: Web Forms: Surveys: New Survey: Survey Question Parameters

---

The descriptions here are both for creating new survey questions and for editing existing survey questions.

### Multiple Choice Questions

---

#### One-line Description

Enter the description for the question itself. For example:

```
What is your favorite color?
```

#### Multiple choices, one on each line

Enter the possible choices for the survey question entered above, one on each line. They will automatically be separated as individual responses. For example:

```
red  
blue  
green  
yellow  
orange  
purple  
other
```

#### Optional Help Text

This is optional, and is intended to help the survey taker understand the question or add more detail to the question itself. This will appear immediately below the question on the survey form. For example:

```
If your favorite color does not appear here, please select  
"other" and enter below.
```

#### Answer Required?

Determines whether or not this answer will be **required** or **not required** in order to submit the survey. Requiring it will force the survey taker to respond.

### How many answers?

Determines if the question should be answered by one answer only or if multiple answers will be allowed. This will depend on the nature of the question. In the above example, if it is assumed that an individual can have only one favorite color, then it should be set to **one answer only**. In other cases, multiple answers may be appropriate; for instance, in a question type where the survey taker selects the countries they have travelled to.

### Question orientation

Select the orientation of the physical appearance of the multiple choice answers. If **vertical**, the answers will be bulleted, one on top of the other:

- red
- blue
- green
- yellow
- orange
- purple
- other

If **horizontal**, they will appear next to each other:

red blue green yellow orange purple other

If the **menu** option is selected, potential answers will appear in a drop-down menu, where the survey taker can scroll up and down to select the correct answer.

### Optional fill-in "other" label

This text will appear before the blank field allowed to describe the "other" option. If this is left blank, there will be no "other" field associated with this question. If only one answer is acceptable for the question, then one of the answers must be selected, or the "other" radio button must be selected and the text entered. If more than one answer is allowed, the "other" answer can be one of the answers. In this example, an appropriate title might be:

Other favorite color

## Text Entry Questions

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### One-line description

Enter the description for the question itself. For example:

Describe your position at your company.

### Optional Help Text

This is optional, and is intended to help the survey taker understand the question or add more detail to the question itself. This will appear immediately below the question on the survey form. For example:

```
Please include your job title, how long you have held this position, and a brief description of your duties and responsibilities, as well as any other relevant information.
```

### **Answer required?**

Determines whether or not this answer will be **required** or **not required** in order to submit the survey. Requiring it will force the survey taker to respond.

## **Utilities: Web Forms: Surveys: Edit Source**

---

Important note: Once you have made changes to the survey's source directly, you may no longer use the survey form builder to edit your survey; all future changes must be made by editing the source directly.

### **Internal survey name**

Displays the Internal survey name of the survey, for reference or descriptive purposes only.

### **Survey name to display**

Displays the display name for the survey, which will be seen by survey takers.

### **Applies to**

Select the list, site, or server that this survey form applies to. Because server administrators can set who has the ability to change these forms, the options available here depend on your access level. Server administrators can edit survey forms for the server, sites, and lists. Site administrators can edit survey forms for sites and lists, and list administrators can only edit the survey forms for lists accessible to them.

### **HTML**

Displays the HTML originally created for the survey form. Any changes to the HTML can be made here directly, and once the form is saved, it can then be repasted into your Web site.

You should make sure that your questions are exactly as they want them to be before editing the HTML. If you change the HTML directly, you will no longer be able to edit the survey's questions through ListManager's survey form builder.

You may edit the HTML header and footer (the page content that is displayed before and after the actual survey questions) on the [New/Edit Survey: Advanced](#) tab.

### **Preview button**

Displays what the survey form will look like when email recipients click through to it or if you insert it into your Web site.

# Referral Forms

## Utilities: Web Forms: Referral Forms

---

Referrals allow your list members to invite their friends to join your list. You may track how many friends were referred by list members, how many opened or clicked on a tracking link in the invitation, and how many ultimately joined the list. For details on how the referral feature works, see [Referral Tracking](#).

### How Do Referral Forms Work?

Referral forms are part of a three-step process, which works as follows:

1. You send out a mailing to your list with a referral link asking members to invite their friends to join the list.
2. List members click on the link, and enter the email addresses of those they'd like to invite, and an optional message for them.
3. The invited members receive an email message telling them how to join the list. If they follow the instructions in the invitation, they become a list member.

To use the referral feature, you must first create an invitation—a message that will be sent to those referred telling them how to join the list. This can be accomplished easily using the Invitation Template in [Content](#), which can be customized to fit your needs. Next, you must [create a referral form](#), the web page members are taken to when they want to invite a friend to join the list. Finally, you must insert a referral link into your [mailing](#) (or into the mailing content).

Note: Your web forms won't work if the host name assigned to ListManager is incorrect. If your form isn't working properly, check the URL to Web Interface in [Utilities: Administration: Sites](#).

## Referral Form Main Page

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### Finding Referral Forms

From the drop-down menu, select **List**, **Site**, or **Server** referral forms. Note that the options available here will depend on the access level of the logged in user. Server administrators can see server, site, and list referral forms. Site administrators can see site and list referral forms. List administrators can see referral forms for the lists administered by them.

Twenty referral forms for the list are displayed. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of referral forms at a time. Click **Next** to see the next twenty, **Previous** to see the last twenty.

You may change the sorting order of the referral forms by clicking the up or down triangles next to Name and Description. By clicking the top arrow, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a).

### **Viewing or Editing Existing Referral Forms**

To view a referral form, click on the title. You will be taken to the [Edit Referral Form](#) screen, where you can preview, edit, and save the form.

### **Copying Referral Forms**

Click **Copy** next to the referral form you'd like to copy. ListManager will show you the old title and description, and will ask for the new title and description. To copy this referral form to another list, select another list from the **New list** drop-down menu. In this way, the referral form can be copied and applied to multiple lists. Note that this option is not available for site or server level forms, only list level forms.

Click copy to save the copied profile form. It will then appear on the main member profile list.

### **Deleting Referral Forms**

Click **Delete** next to the referral form you'd like to remove. ListManager will ask you if you're sure before deleting the form.

## **Using Referral Forms**

---

There is a three-step process to do this:

### **1. Create an Invitation**

The invitation is sent to those who are invited to join your list by your members. Referrers can optionally add their own message (if your referral form allows it). Note that you can include clickthrough links in the invitation message. For details on how to create the invitation, see [Content: New Content from Template](#).

### **2. Create a Referral Form**

The referral form is a web page where your list members will enter in the email addresses of people they would like to invite to join your list. Only members can refer others to join a list. To learn how to create a referral form, see [Utilities: Web Forms: Referral Forms: New Referral Form](#) and to learn how to create one from a template, see [Utilities: Web Forms: Referral Forms: Referral Form From Template](#).

### **3. Create a Referral Link**

In order for your members to be able to invite friends to join your list, you must insert a referral link into your mailing. This is done in Content, by clicking the insert fieldbutton on either the Text Message or HTML Message tabs. To learn how to do this, see [Content: Insert URL: Referrals](#).

# Utilities: Web Forms: Referral Forms: New Referral Form

---

## Title

Enter a descriptive **Title** for your referral form. A title is required in order to save the referral form.

## Description

Enter a relevant **Description** for your referral form. A description is required in order to save the referral form.

## Applies To

Select the list, site, or server setting that this referral form **Applies to**; the level set here determines the access level required to edit the referral form. Server administrators can edit the server, site, and list referral forms. Site administrators can edit sites and lists, and list administrators only edit the lists accessible to them.

## HTML

Enter the **HTML** for the referral form. If you are using a template to create the referral form, the HTML will automatically be inserted here when the template is selected. For more information on creating referral form templates, see [Utilities: Web Forms: Web Form Templates: New Referral Form Template](#).

A standard example of HTML for a referral form is:

```
<html>
<head>
<title>Refer a Friend</title>
</head>

<body bgcolor="#FFFFFF" link="#0066FF" vlink="#0066FF"
alink="#0066FF">

<center>

<FORM ACTION="/doinvite" METHOD="post">

<!-- leave the following hidden fields as-is -->
<INPUT TYPE="hidden" NAME="DetectCode" VALUE="$DetectCode">
<INPUT TYPE="hidden" NAME="DestUrlId" VALUE="$DestUrlId">
<INPUT TYPE="hidden" NAME="MemberID" VALUE="$MemberID">
<INPUT TYPE="hidden" NAME="DocID" VALUE="$DocID">
<INPUT TYPE="hidden" NAME="ReferralFormID"
VALUE="$ReferralFormID">
<INPUT TYPE="hidden" NAME="MessageID" VALUE="$MessageID">
<INPUT TYPE="hidden" NAME="HashCode" VALUE="$HashCode">
<INPUT TYPE="hidden" NAME="ListName" VALUE="$ListName">
<!-- ----- -->

<table border="0" bgcolor="#003366" cellpadding="5"
cellspacing="5" width="550">
```



```

<tr>
<td>

<a target="home_page"
href="http://www.lyris.com/products/listmanager/" title="Go to
the Lyris ListManager home page"></a>

</td>
</tr><tr>
<td bgcolor="#FFFFFF" align="center">

<table>
<tr>
<td></td>
<td colspan="2">
&nbsp;<br>

<font face="verdana, arial" size="-2">
<b>You can invite your friends to join this list by filling out
the form below.<br>
We'll send them some information about the list and a sample
issue!</b>
</font>

<br>&nbsp;<br>
</td>
<tr>
<td></td>
<td>
<font face="verdana, arial" size="-2">Your email:</font><br>
<input type="text" name="SenderEmailAddr" size="30"
MAXLENGTH="100" VALUE="[mf_html::quoteFormValue
$SenderEmailAddr]">
</td><td>
<font face="verdana, arial" size="-2">Your name:</font><br>
<input type="text" name="SenderFullName" size="30"
MAXLENGTH="100" VALUE="[mf_html::quoteFormValue
$SenderFullName]">
</td>
</tr><tr>
<td>&nbsp;</td>
</tr><tr>
<td></td>
<td><font face="verdana, arial" size="-2">Email:</font></td>
<td><font face="verdana, arial" size="-2">Name:</font></td>
</tr><tr>
<td align="right">
<font face="verdana, arial" size="-2">Friend #1</font>
</td>

<!-- You can add additional friends' address entries. All
entries use the same name in the input tag. -->

<td><input type="text" name="FriendsEmailAddr" size="30"
MAXLENGTH="100"></td>
<td><input type="text" name="FriendsFullName" size="30"
MAXLENGTH="100"></td>
</tr><tr>

```

```

<td align="right">
<font face="verdana, arial" size="-2">Friend #2</font>
</td>
<td><input type="text" name="FriendsEmailAddr" size="30"
MAXLENGTH="100"></td>
<td><input type="text" name="FriendsFullName" size="30"
MAXLENGTH="100"></td>
</tr><tr>
<td align="right">
<font face="verdana, arial" size="-2">Friend #3</font>
</td>
<td><input type="text" name="FriendsEmailAddr" size="30"
MAXLENGTH="100"></td>
<td><input type="text" name="FriendsFullName" size="30"
MAXLENGTH="100"></td>
</tr><tr>
<td>&nbsp;</td>
</tr><tr>
<td></td>
<td colspan="2">
<font face="verdana, arial" size="-2">Message
subject:</font><br>
<input type="text" name="SenderSubject" size="66"
MAXLENGTH="200" VALUE="[mf_html::quoteFormValue
$SenderSubject]">
</td>
</tr><tr>
<td>&nbsp;</td>
</tr><tr>
<td></td>
<td colspan="2">
<font face="verdana, arial" size="-2">Your message:</font><br>
<textarea name="SenderMessage" cols="50"
rows="4">[mf_html::quoteFormValue $SenderMessage]</textarea>
</tr><tr>
<td></td>
<td colspan="2">
<font face="verdana, arial" size="-2">
<input type="checkbox" name="SendCopyToReferrer" VALUE="T"[if {
$SendCopyToReferrer=="T"} { return " CHECKED" } else { return "
}]>Send me a copy of this message
</font>
</td>
</tr><tr>
<td>&nbsp;</td>
</tr><tr>
<td colspan="4" align="right">
<input type="image" border="0" name="Invite my friends"
src="/img/english/button_invite_my_friends.gif"></td>
</tr>
</table>

</td>
</tr>
</table>

</form>

</center>

```

```
</body>
</html>
```

## Utilities: Web Forms: Referral Forms: Referral Form From Template

---

Referral form templates can be created and saved, and then used to create a referral form. To see how to create referral form templates, see [Utilities: Web Forms: Web Form Templates: New Referral Form Template](#).

Once the template is created, it will appear on the **Choose a Template** drop-down menu. ListManager includes a default referral form template, which can be edited or used as is. Select the template from the drop-down menu and click OK. This inserts the HTML from the template into the referral form you are creating.

## Utilities: Web Forms: Referral Forms: Edit Referral Form

---

### Title

Edit the referral form **Title**. The title entered here will not be displayed on the Web site containing the profile form.

### Description

Edit the profile form **Description**. The description entered here will not be displayed on the Web site containing the profile form.

### Applies To

Select the list, site, or server that this member profile form **Applies to**. Because server administrators can set who has the ability to change these forms, the options available here depend on your access level. Server administrators can edit the referral forms for server, sites, and lists. Site administrators can edit referral forms for sites and lists, and list administrators only edit referral forms for the lists accessible to them.

### HTML

Displays the **HTML** originally created for the referral form. Any changes to the HTML can be made here directly, and once the form is saved, it can then be repasted into your Web site.

### Preview

Displays what the Referral form will look like on your Web site.

## Web Form Templates

# Utilities: Web Forms: Templates: Referral Form Templates

---

Referral form templates allow you to create and save templates for a referral form, which you may want to use repeatedly. Once these are created here, they appear as options in the drop-down menu when [creating a referral form from a template](#).

Note that referral form templates, which are web forms, should not be confused with content templates.

## Referral Form Template Main Page

---

### Finding Referral Form Templates

From the drop-down menu, select **List**, **Site**, or **Server** referral form templates. Note that the options available here will depend on the access level of the logged in user. Server administrators can see server, site, and list referral form templates. Site administrators can see site and list referral form templates. List administrators can see referral form templates for the lists administered by them.

Twenty referral form templates for the list are displayed. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of referral form templates at a time. Click **Next** to see the next twenty, **Previous** to see the last twenty.

You may change the sorting order of the referral form templates by clicking the up or down triangles next to Name and Description. By clicking the top arrow, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a).

### Viewing or Editing Referral Form Templates

To view a referral form template, click on the title. You will be taken to the [Edit Referral Form Template](#) screen, where you can preview, edit, and save the template.

### Copying Referral Form Templates

Click **Copy** next to the referral form template you'd like to copy. ListManager will show you the old title and description, and will ask for the new title and description. To copy this referral form template to another list, select another list from the "New list" drop-down menu. In this way, the referral form template can be copied and applied to multiple lists. Note that this option is not available for site or server level forms, only list level forms.

Click copy to save the copied template. It will then appear on the main referral form template list.

## Deleting Referral Form Templates

Click **Delete** next to the template you'd like to remove. ListManager will ask you if you're sure before deleting the form.

# Utilities: Web Forms: Templates: Edit Referral Form Template

---

Referral form templates allow you to create and save templates for a referral form, which you may want to use repeatedly. Once these are created here, they appear as options in the drop-down menu when [creating a referral form from a template](#).

Note that referral form templates, which are web forms, should not be confused with content templates.

### Title

Edit the referral form template **Title**.

### Description

Edit the referral form template **Description**.

### Applies To

Select the list, site, or server that this template **Applies to**. Because server administrators can set who has the ability to change these templates, the options available here depend on your access level. Server administrators can edit the templates for server, sites, and lists. Site administrators can edit the templates for sites and lists, and list administrators only edit templates for the lists accessible to them.

### HTML

Displays the **HTML** originally created for the referral form. Any changes to the HTML can be made here directly.

### Preview

Displays what the Referral form will look like on your Web site.

## Automated Messages

### Utilities: Automated Messages

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ListManager sends automated messages in response to email messages it receives or in response to user actions, such as joining or leaving a list. It may also send automated messages when someone writes to an autoresponder email address, or when a word or phrase in a message is a match phrase.

You may create and assign custom content for the following types of automated messages:

**Confirm**

Notification that a prospective member must confirm a request to join the list.

**Delivery report**

Delivery status notification optionally sent to administrators.

**Held**

Notification that a member's email address is held due to too many successive undeliverable messages.

**Hello**

Notification that a member has successfully joined a list.

**Goodbye**

Notification that a member has been unsubscribed from a list.

**Private-notification**

Notification that a request to join a list is pending approval by an administrator.

**Unsubscribe Confirmation**

Notification that an unsubscribing member must confirm that request to be removed from a list.

**Reset Password**

Message with instructions on how to reset a lost password.

**Private-approved**

Message letting subscriber to a private list know the membership has been approved.

**Duplicate Post**

Informs poster the message has been rejected as it is a duplicate.

To customize an automated message, first create [document content](#). Document content is exactly like mailing content, but is available to be assigned for automated messages. We recommend you create your document content from a template, and then edit it.

Once you have created document content, you may [associate the document](#) with one of the above types of automated messages. ListManager will use its own default document for these messages if none is specified.

**Autoresponders**

An [autoresponder](#) can reply with the document content of your choice when someone sends a message to the ListManager email address you designate. ListManager can also notify specified email addresses when the autoresponder has been triggered. Autoresponders may be used for automated replies, price sheets, white papers, etc.

**Match Phrases (formally Action Phrases)**

[Match phrases](#) trigger various actions based on some text appearing in a message. If the specified "match" is made, the offending text may be changed or deleted, or the

entire message may be blocked, and the sender be notified. Or, an administrator may be notified that the match phrase has been triggered. Match phrases may be used to look for offensive language in messages, among other uses.

## Document Content

### Utilities: Automated Messages: Document Content

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Document Content is a specialized type of content that can be sent when users perform certain actions. Once you have created document content, you must [associate](#) that content with a user action (such as joining or leaving a list) in order to have the content sent out automatically.

Document content, like regular content, may be HTML, text, both HTML and text, and include attachments.

By specifying whether a document is a List, Site, or Server document, you control the administrative level that is able to edit the content.

Creating document content is very similar to creating mailing content, with templates available to assist with the proper mail merge codes and standard phrasing. The templates available are:

**confirm**

Notification that a prospective member must confirm a request to join the list. Note that a confirm-type document should have %%url.confirm%% or %%email.confirm%% so users may confirm their memberships.

**held**

Notification that a member is on hold due to successive undeliverable messages.

**hello**

Notification that a member has successfully joined a list.

**goodbye**

Notification that a member has been unsubscribed from a list.

**private-notification**

Notification that a request to join a list is pending approval by an administrator.

**unsub-confirm**

Notification that an unsubscribing member must confirm that request to be removed from a list.

**reset-password**

Message with instructions on how to reset a lost password.

**unsub-confirm**

Message asking the recipient to confirm unsubscribing.

**reset-password-mri**

Message with instructions on how to reset a lost password for list members using the discussion forum interface.

**join-private-approved-response**

Notification that a request to join a private list has been approved.

**post-failed-duplicate**

Notification that an attempt to post a message has failed because it was detected to be a duplicate.

These templates are the same as the default messages ListManager sends if no document associations are made.

Documents are also used for [list informational](#) purposes, and for making [autoresponders](#) and [match phrases](#).

## Finding Documents

Twenty documents for the list you are currently logged into are displayed at one time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of documents at a time.

You may change the sorting order of the content by clicking the up or down triangles next to Message Type, Document Title, and Default. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty content units, **Previous** to see the last twenty. Click on the drop-down box to see the documents for other lists, and the site or server if you have administration privileges to do so.

### Content Name

The name of document this is (confirm, goodbye, held, hello, private; see below for details on these). To edit a document content, click on the message type link.

### Description

The description of the document content. What you see here is what is entered in the Description field when creating a new content.

## Viewing or Editing Existing Document Content

Click on the content name to see a detailed description. The document content can be edited from here as well. See [Content: All Content: Edit Content](#) for more information.

## Deleting Document Content

Click **Delete** next to the document you'd like to delete. ListManager will ask you if you're sure before deleting the document content.

## Creating New Document Content

Creating a new document content is the same as creating any other type of content for a mailing. Click create new to be taken to [Content: New Content](#).



## Document Associations

### Utilities: Automated Messages: Document Associations

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Document Associations are used to associate a document created in [Document Content](#) with a message type, language, and list. These are messages sent to users in response to certain actions, such as joining a list which results in a "hello" message, or leaving a list which results in a "goodbye" message.

To create a new document association, see [Utilities: Document Associations: New Document Association](#).

In addition to associating a document with a particular message type for a list, the same association can be made for the current site or the entire server, depending on your admin privileges. Associations made at site and server levels are inherited by the lists and sites under them unless overridden by an association at a lower level. For example, a site administrator can associate a hello document for all lists under that site, but a list administrator can override that association at the list level.

#### Document Association Types

##### Duplicate List Posting Rejection Document

###### Confirm

Notification that a prospective member must confirm a request to join the list.

###### Delivery report

Delivery status notification optionally sent to administrators.

###### Goodbye

Notification that a member has been unsubscribed from a list.

###### Held

Notification that a member's email address is held due to too many successive undeliverable messages.

###### Hello

Notification that a member has successfully joined a list.

###### Private-notification

Notification that a request to join a list is pending approval by an administrator.

###### Reset Password

Message with instructions on how to reset a lost password.

###### Reset Password from Discussion Forum Interface

### **Unsubscribe Confirmation**

Notification that an unsubscribing member must confirm that request to be removed from a list.

### **Message sent when a private list subscription is approved by an admin**

## **Finding Document Associations**

Twenty message types for the list you are currently logged into are displayed at one time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of message types at a time.

You may change the sorting order of the associations by clicking the up or down triangles next to Message Type, Document Title, and Default. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty content units, **Previous** to see the last twenty. Click on the drop-down box to see the documents for other lists, and the site or server if you have administration privileges to do so.

### **Message Type**

The type of document association this is (confirm, goodbye, held, hello, private; see below for details on these). To edit a document association, click on the message type link.

### **Document Title**

The actual name of the document, as set in the [Contents](#) "Content Name" field.

### **Is Default?**

Displays whether or not this is the default document association for each type. The yes/no default setting is on the Edit Document Associations page. Note that you can have multiple document associations set up for different languages, but if it is set as default = Yes, then this will be the default for all languages.

## **Viewing or Editing An Existing Document Association**

To view a message, click on the message type link. Here you can:

- Change the message type (i.e. list goodbye document or list confirm document)
- Find the actual document in the Document drop-down menu. The documents you see here must be created in [Document Contents](#).
- Set the document association as a default. If set to "yes", this document association will apply to all languages at the specified list, site, or server level. So for instance, if the server has documents defined for English, French, or Spanish, but the site has a default document specified, all lists under that site will use the default document regardless of their language setting.

## **Deleting a Document Association**

Click **Delete** next to the document you'd like to delete. ListManager will ask you if you're sure before deleting the document.

## Creating a New Document Association

Click create new to be taken to [Utilities: Document Associations: New Document Association](#).

# Utilities: Automated Messages: Document Associations: New Document Association

---

### Applies To

The list, site or server this document can be used for. The document can apply to a single list, all lists on the site, or all lists on the server.

### Language

Set the language in which the content will be associated with the message.

### Message Type

Select the type of message from the drop-down menu. The following options are available:

#### **Duplicate List Posting Rejection Document**

#### **Confirm**

Notification that a prospective member must confirm a request to join the list.

#### **Delivery report**

Delivery status notification optionally sent to administrators.

#### **Goodbye**

Notification that a member has been unsubscribed from a list.

#### **Held**

Notification that a member's email address is held due to too many successive undeliverable messages.

#### **Hello**

Notification that a member has successfully joined a list.

#### **Private-notification**

Notification that a request to join a list is pending approval by an administrator.

#### **Reset Password**

Message with instructions on how to reset a lost password.

#### **Reset Password from MRI**

### Unsubscribe Confirmation

Notification that an unsubscribing member must confirm that request to be removed from a list.

### Message sent when a private list subscription is approved by an admin

### Document

Select the actual document to include in the message. The documents you see here *must* be created first in [Document Content](#), by selecting List, Site, or Server documents. Note that when creating a server document association, list and site level documents will not be available. If you'd like to use a list level document as the server default, copy the desired content and specify it as a server-level document.

### Is Default?

Set whether or not this document association is going to be a default for that type.

## Utilities: Document Association: Sample Documents

### Sample "Hello" Document

---

The following document is an example of an extensive "hello" document that you might want mailed to new members of your discussion mailing list. The document for an announcement or email marketing list would be much shorter. ListManager provides a "hello" template that you may use when creating your own welcome message.

Note: Please note that all list document messages will appear as coming "FROM: Lyris ListManager". To override this and change this to another FROM: designation, you can change the headers in the Content [Advanced](#)tab.

This is a real document, used by the "Rhapsody" mailing list. It is reprinted here by permission of the author, Vince Sabio.

```
*****
****
* PLEASE SAVE THIS WELCOME MESSAGE! *
*****
****

Welcome to the Rhapsody Discussion List ...

The purpose of this list is to provide an open forum for the
posting and discussion of news and information relating to the
Rhapsody operating system. That means that ANYTHING Rhapsody
related is fair game. However,
if you have something that is not somehow related to Rhapsody --
for example, Apple's stock increased by two points -- it would
be better to post it to one of the more general Macintosh-
```

related forums; subscription information for two of them is provided below.

Commercial announcements are allowed and encouraged, but please follow the guidelines listed in the Posting section of the Rhapsody Discussion List FAQ (see item 6 below), or on the web at <http://user.icx.net/~bgiles/rhapsody/posting.html>.

This list is hosted on a Lyris ListManager mailing ListManager, provided to us by ListManager Corp. As such, we are guests on this server, and a level of decorum commensurate with our status as guests will be enforced on this list. Please keep discussion civil and constructive, and take heated discussions and non-constructive comments off the list. Failure to do so will result in the subscribers' posting privileges being revoked by the listmoms for a "cooling off period."

The listmoms for the Rhapsody Discussion List are:

Bruce Giles <bgiles@icx.net>  
Randy Meadows <rmeadows@fgm.com>  
Vince Sabio <listmom@telephonet.com> (list owner)

To send a message to all three listmoms at once, use the address <rhapsody-owner@clio.lyris.net>.

Please feel free to contact any of us with questions regarding the Rhapsody Discussion List or if you experience any problems with the server.

Just so that you have all the commands neatly contained in one place, here is just about everything you will need to know. Note that the list is running on a Lyris ListManager; this is a very new (and VERY NICE!) server, so be aware that the commands might be different from those that you are used to using on other list managers. (For more information on Lyris ListManager, see <http://www.lyris.com/>.)

1. First of all, almost everything that you might need to do on the server is most easily and effectively performed via its web interface at <http://clio.lyris.net/rhapsody/>.

2. In case you do not have Web access, here are some key commands; in all cases, the default server address is <listmanager@clio.lyris.net>. Other addresses are shown where appropriate. Note: Commands may be placed in either the subject line or in the body of the message:

SUBSCRIBING:  
subscribe rhapsody your name  
join rhapsody your name  
alternate address: join-rhapsody@clio.lyris.net

UNSUBSCRIBING:  
unsubscribe rhapsody  
leave rhapsody  
alternate address: leave-rhapsody@clio.lyris.net

SETTING MEMBERSHIP TO DIGEST MODE:  
set rhapsody digest

SETTING MEMBERSHIP TO INDEX MODE:  
set rhapsody index

SETTING MEMBERSHIP TO DISCUSSION MODE:  
set rhapsody mail

TEMPORARILY SUSPENDING MAIL FROM THE LIST:  
set rhapsody nomail

RESUMING MAIL FROM THE LIST: (command depends on your preferred mode)  
set rhapsody mail  
set rhapsody digest  
set rhapsody index

ACKNOWLEDGMENT:  
set rhapsody ack  
(sends you a confirmation message when your posts are distributed)  
set rhapsody noack  
(no confirmation message when posts are distributed)

RECEIVING COPIES OF YOUR OWN POSTS:  
set rhapsody repro  
(receive copies of your own posts)  
set rhapsody norepro  
(do not receive copies of your own posts)

SETTING YOUR PASSWORD:  
set rhapsody pw=myspassword  
(where "myspassword" is the password you wish to set)

DETERMINING YOUR MEMBERSHIP SETTINGS:  
query rhapsody

RETRIEVING THE CURRENT VERSION OF THIS DOCUMENT:  
get rhapsody hello

MORE INFORMATION ON LYRIS LISTMANAGER'S COMMANDS:  
help

RETRIEVING THE CURRENT LIST FAQ:  
Send a blank email message to:  
rdl-faq@clio.lyris.net

RETRIEVING THE CURRENT LIST OF RHAPSODY RESOURCES:  
Send a blank email message to:  
rhapsody-resources@clio.lyris.net

RETRIEVING THE CURRENT LIST OF RHAPSODY QUESTIONS AND ANSWERS:  
Send a blank email message to:  
rhapsody-faq@clio.lyris.net

POSTING TO THE LIST: You must be a subscriber to post messages. Sending mail to this address will distribute it to all the members of the mailing list:  
rhapsody@clio.lyris.net

3. CHANGING YOUR SETTINGS/ADDRESS VIA THE WEB INTERFACE: To do this, go to <<http://clio.lyris.net/rhapsody/>> and click the link in the "Change Your Settings" section. You'll need to enter your email address and

password (if you chose one) to continue.

(If you've forgotten your password, you can type in your email address in the field at the bottom of the page and click "Get password" to request Lyris ListManager to email your password to you.)

At the following page, you can read messages, post a message, adjust your settings, or unsubscribe. From the settings page you can change your status (MAIL, DIGEST, INDEX, or NOMAIL), choose whether or not to see your own messages, or choose whether or not you want to receive a separate acknowledgement via email when one of your messages is posted to the list. You can also change your email address if you need to. When you change your settings, make sure you click the **Save** button at the bottom of the page.

4. RDL Web site: The Rhapsody Discussion List has a Web site at <<http://user.icx.net/~bgiles/rhapsody/>>. The Web site includes all the information in this document, PLUS a list of common questions and answers, and a list of Rhapsody resources, both on and off the Internet.

Please visit the site and let us know what you want to see there.

5. OBTAINING THE FAQ AND OTHER DOCUMENTS: You can receive the current version of the Rhapsody Discussion List FAQ by email at any time by sending an email message to <[rdl-faq@clio.lyris.net](mailto:rdl-faq@clio.lyris.net)>. The subject line and body text of your message are ignored. Simply sending a blank message to this address is sufficient.

You can receive a current list of Rhapsody resources by sending a blank email message to <[rhapsody-resources@clio.lyris.net](mailto:rhapsody-resources@clio.lyris.net)>.

You can receive a current list of Rhapsody questions and answers by sending a blank email message to <[rhapsody-faq@clio.lyris.net](mailto:rhapsody-faq@clio.lyris.net)>.

6. BOUNCED MAIL: One of the key features of Lyris ListManager is its ability to handle mail bounces transparently to the list owner; as such, bounced mail will be handled primarily by the Lyris ListManager.

7. POSTS/REPLIES FROM DIGEST USERS: You *must* change the Subject: line when replying to a digest; all posts with "RHAPSODY DIGEST" in the Subject: line will be rejected by the server (you will receive a "rejection letter" when this happens).

PROBLEMS: If you have ANY problems related to the Rhapsody Discussion List, *please* do not post them to the list. Listmoms (list managers) are at your disposal for this very purpose; please avail yourself of the resource:

Bruce Giles <[bgiles@icx.net](mailto:bgiles@icx.net)>  
Randy Meadows <[rmeadows@fgm.com](mailto:rmeadows@fgm.com)>  
Vince Sabio <[listmom@telephonet.com](mailto:listmom@telephonet.com)> (list owner)

To send a message to all three listmoms at once, use the address <[rhapsody-owner@clio.lyris.net](mailto:rhapsody-owner@clio.lyris.net)>.

If you have any questions about the list or the Lyris

ListManager, feel free to contact any or all of us. (NOTE: I currently manage five mailing lists; please be sure to state in your message which list you are referring/subscribed to. Thanks!)

Once again, welcome to the Rhapsody Discussion List.

- Vince Sabio  
Rhapsody List Owner  
listmom@telephonet.com

OTHER LISTS:

As I mentioned earlier, here are two very good Macintosh-related mailing lists:

Mac-L: Macintosh News and Information  
Format: Open subscription/open discussion  
Server: listserv@list.nih.gov  
In body: subscribe Mac-L your name

MacMarines: A Macintosh advocacy/activist group  
Format: Open subscription/moderated/very little discussion  
Server: listmaster@marlowe.net  
In body: join macmarines your email address

DISCLAIMER:

The Rhapsody Discussion List is not associated with Apple Computer Corporation or its affiliates. The list is an independent open forum for news, information, and discussion relating to the Rhapsody operating system. The server and resources for the Rhapsody Discussion List are provided by Acme Corp, Ltd., which also has no association with Apple Computer Corp.

## Sample "Confirm" Document

---

Here is a sample "confirm" document that uses mail merge codes to put the correct information in. You might want to create a server-level confirm document with this text in it, so that all lists can use this same confirm document and ListManager will automatically substitute the correct information in.

Note: Please note that all list document messages will appear as coming "FROM: Lyris ListManager". To override this and change this to another FROM: designation, you can change the headers in the Content [Advanced](#) tab.

ListManager provides a "confirm" template that you may use when creating your own confirmation message. Note that a confirm-type document should have %%url.confirm%% or %%email.confirm%% so users may confirm their memberships.

Subject: Your confirmation is needed

Welcome! Your confirmation is needed for the following lists:



```
%%whatlistsunconfirmed%%
```

By clicking on this link, you will confirm yourself for all of these lists at once!

```
%%url.confirm%%
```

Or, send a message to

```
%%email.confirm%%
```

Or, unsubscribe immediately by sending an email message to

```
%%email.unsub%%
```

## Autoresponders

### Utilities: Automated Messages: Autoresponders

An autoresponder is a ListManager email address that always responds by sending a [document](#) to whomever sends an email to it.

For instance, set up a "prices@lists.yourcompany.com" autoresponder that sends out a price list to anyone who emails to that email address.

An autoresponder with information on how to unsubscribe or get in touch with someone at your organization is useful to have in the From: field of your content.

An autoresponder may also be used to [automatically process complaints](#) sent to you by an email provider.

#### Finding an Autoresponder

Twenty autoresponders are shown at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of autoresponders at a time.

You may change the sorting order of the autoresponders by clicking the up or down triangles next to Email or Title. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty autoresponders, **Previous** to see the last twenty.

#### Email

The email address prefix for this autoresponder.

#### Title

The title of this autoresponder.

Click on the drop-down box to select a different list's autoresponders, or to view all autoresponders for the server.

#### Viewing or Editing an Autoresponder

To view an autoresponder, click on the autoresponder's email prefix. You will be taken to the [Utilities: Autoresponders: Edit Autoresponder](#) page, where you can view or edit the autoresponder.

### Copying an Autoresponder

Click **Copy** next to the autoresponder you'd like to copy.

### Deleting an Autoresponder

Click **Delete** next to the autoresponder you'd like to delete. ListManager will ask you if you're sure before deleting the autoresponder.

### Creating An Autoresponder

Click create new autoresponder to be taken to the [Utilities: Autoresponders: New Autoresponder](#) page.

### Download as a File

Click on the disk icon to download your list of autoresponders in CSV format.

## Custom Handling of Complaint Mails

---

Users can override the default behavior of the complaint handlers. If the appropriate entry is added to the [tclCustom.tcl](#) file (which is sourced by ListManager on startup if the file exists) file in Tcl library directory (tclweb\lib\lm on Windows, tclweb/lib/lm under Linux), a new process for handling complaint mails can be created. You may wish to create a replacement or additional process for complaint handling, to take care of tasks like unsubscribing the complainer on all lists on the server (or site), writing complainers to an external table, etc.

To make sure that the custom handler is used, here is how to set up the autoresponder:

- 1) Go to Utilities : Automated Messages : Autoresponders
- 2) Click **Create New Autoresponder**.
- 3) On the Essentials Tab, create an Email address prefix for your complaint handler (e.g., abuse).
- 4) On the Advanced Tab, select **Complaints** for the "Special Mail Handling" dropdown, and your complaint handler (e.g., NewComplaintHandler using the example below) for the "Run Tcl Extension" dropdown.
- 5) Click the Save **button** to put the new handler into production.

Here's an example of what the tclCustom.tcl file should look like:

```
#####  
#  
# file tclCustom.tcl  
#  
# establish the special handler Tcl namespaces  
  
namespace eval ::tclextensions:: {}
```

```

namespace eval ::tclextensions::autoresponder:: {}

# Any procedure that starts with ::tclextensions::autoresponder:: will show up in the "Run Tcl
Extension" dropdown
# but the name must NOT start with _extract

# Arguments
#
# MemberID - the MemberID_ value of the user from the members_ table
# MailingID - the MessageID_ value of the incoming message in the inmail_ table
# ListID - the ListID_ value from the lists_ table that the complaining member is on
# ComplaintMessageID - the MessageID_ value from the outmail_ table for the posting that the
user is complaining about
# UserNameLC - the local name (part to the left of the @ in the email address) for the
complaining user
# Domain - the ISP/domain name part of the email address of the complaining user
# RcptTo - the destination address that the complaint was sent to (which is the auto-responder's
email address)
#
# Return value
# 0 - This extension replaces the default complaint processing
# 1 - This extension is used in conjunction with the default complaint process (but precedes it)
#
proc ::tclextensions::autoresponder::NewComplaintHandler {MemberID MailingID ListID
ComplaintMessageID UserNameLC Domain RcptTo} {

# Write the complaining user out to a file

set fd [open "C:\complaints.txt" a]
if {$fd == ""} {
# can't open file, just continue processing
return 1
}

set callinfo "MemberID - $MemberID\nMailingID - $MailingID\nListID -
>ListID\nComplaintMessageID - $ComplaintMessageID
UserNameLC - $UserNameLC\nDomain - $Domain\nRcptTo - $RcptTo\n"

# write parameters out to the file, catch and ignore errors
catch {puts $fd $callinfo}
catch {close $fd}

# allow default processing to occur
return 1

}

```

## New/Edit Autoresponder

# Utilities: Automated Messages: Autoresponders: New/Edit Autoresponder: Essentials

---

The Edit Autoresponder pages are identical to the New Autoresponder pages.

### Email Address Prefix

The email address that the autoresponder will respond to. If you enter "sales," any mail sent to "sales@..." on this ListManager server will trigger the autoresponder. You cannot have duplicate autoresponder email addresses on the ListManager server, nor can you have an autoresponder address which is the same as a list address.

Do not enter an @ sign or a hostname; that will be filled in automatically by ListManager.

When ListManager replies to an auto-responder request, the From: and Reply-To: of the document sent back is the address of the auto-responder itself.

### Document Title

The name of the document you'd like to have sent automatically when someone writes to the autoresponder address. If you don't see the name of the document you want, or if you'd like to create a new one, click on Create Document to be taken to [Utilities: List Document: New List Document](#).

# Utilities: Automated Messages: Autoresponders: New/Edit Autoresponder: Advanced

---

### Notify Email Address

If filled in, this email address will receive a notification when this match phrase is triggered. The notification will include the full document text of the email message sent to trigger the autoresponder.

You may have multiple addresses notified by separating them with commas. Example:

```
joe@example.com, jane@example.com
```

### Applies To

Select the desired list, site, or server from the drop-down menu. Server-wide autoresponders can only be created or edited by server administrators. Autoresponders for sites can only be created or edited by site administrators, and list administrators can create and edit autoresponders for only the lists accessible to them.

### Special Mail Handling

To make this a Complaint autoresponder, select **Complaints**.

[Learn more about complaint autoresponders.](#)

### **Run Tcl extension**

Runs the specified Tcl extension on the message. This option is only available to server administrators. By selecting "whitelist-complaint-handler", messages sent to this autoresponder address will:

- Automatically delete any active mailings for the member
- Unsubscribe the member
- Ban that member from the list, so the member may not be readded
- Log the complaint, viewable in Reports: Members: Member Complaints and recorded in the lyrMemberComplaintLog table.

To use this feature, you must have an agreement with an ISP to send complaints to the email address you specify for this autoresponder. See [Whitelist Complaint Handling](#) for more information.

## **Utilities: Automated Messages: Autoresponders: New/Edit Autoresponder: For Programmers**

---

### **Run a Program Before**

This setting allows you extend the auto-responder command processing with your own program. When the auto-responder is triggered, your program will first be run and then your program can do any processing it wishes on the message. If your program wants to stop processing of the message, it can delete it.

### **Run a Program After**

This setting allows you extend the auto-responder command processing with your own program. When the auto-responder is triggered, your program will first be run and then your program can do any processing it wishes on the message.

## **Match Phrases**

### **Utilities: Automated Messages: Match Phrases**

---

Match phrases are a feature in ListManager that allow you to trigger various actions based on some text appearing in a message. You can look for a trigger phrase in the body of a message, in the headers, in the Subject:, the From:, etc.

Match phrases permit several kinds of security restrictions to be placed on postings. For example, you can use a match phrase to refuse if a message if particular text either does or does not appear in a specific place in the message.

A few examples will help to clarify this:

Suppose that everyone in your company uses the Eudora Email program, which, incidentally inserts a "X-Mailer: Eudora" header in every message it sends. You can put a match phrase that automatically rejects any message not created with Eudora. Then, to hide the fact that "X-Mailer: Eudora" might be the trigger phrase, have the ListManager match phrase change the message to say "X-Mailer: Windows Eudora," so that it no longer matches.

This use of the match phrase feature allows you to reject all messages that do not have some secret phrase in them. If you want, you can create multiple match phrases to add several layers of checks. This sort of checking is very useful with announcement lists.

Match phrases also have the capability of sending a document back, so you can inform the attempted sender that their message was refused. You also have the option being notified when a match phrase is triggered. This lets you monitor attempts to "hack" your system.

Another example: Suppose that you maintain a mailing list to discuss Apple computers and you are not interested in discussing Unix. You can set a match phrase to refuse any message that mentions "Unix". People often use this feature to bar inappropriate language on their discussion lists.

Match phrases are not restricted to postings. For example, they can also be put on an auto-responder. You could put your price list on an auto-responder, but require a password to get it. If the password is not in the email message, the match phrase triggers and sends a refusal message. If the password is present, the match phrase does not trigger and the price list is sent.

Some people use match phrases to disable ListManager server commands or to be notified of things that are suspicious. For example, some mailing list owners have had their lists "hacked" when they were using other list managers and like to be told if someone is trying to snoop through their list. Thus, they disallow the "review" command (which already does not provide the member list) and set themselves to be notified of any attempts to use this command.

Yet another use of match phrases is to only allow postings from certain domains -- for example, only people whose email addresses have the text "@yourcompany.com" in their From: address are allowed through.

Note that ListManager's header rewrites are performed before messages are processed by match phrases.

Match phrase checking is not performed on some addresses, such as listname-owner addresses.

### **Finding a Match Phrase**

Twenty match phrases are shown at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of match phrases at a time.

You may change the sorting order of the match phrases by clicking the up or down triangles next to Phrase, Title, or Reject. By clicking the top triangle, the sort order will

be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty autoresponders, **Previous** to see the last twenty.

**Phrase**

The phrase name that triggers this match phrase to respond (either accept or reject the message).

**Title**

The title of the response document (if any) associated with the match phrase.

**Reject**

Displays whether or not ListManager is to reject (yes) or accept (no) a message containing the match phrase.

Click on the drop-down box to select a different list's match phrases, or to view all match phrases for the server.

**Viewing or Editing a Match Phrase**

To view a match phrase, click on the match phrase name. You will be taken to the [Utilities: Automated Messages: Match Phrases: New Match Phrase: Essentials](#) page, where you can view or edit the match phrase.

**Title**

Displays the name of the response document associated with the match phrase. When creating match phrases, you can set if a response document is sent to the sender, whether the message is accepted or rejected. If no document is associated with the match phrase, it will say "(none)". To associate a particular document from Document Content with a match phrase(s), see [Utilities: Automated Messages: New Match Phrase: Essentials](#).

**Reject**

Displays whether or not ListManager will reject (yes) or accept (no) messages containing this match phrase.

**Copying a Match Phrase**

Click **Copy** next to the match phrase you'd like to copy.

**Deleting a Match Phrase**

Click **Delete** next to the match phrase you'd like to delete. ListManager will ask you if you're sure before deleting the match phrase.

**Creating a Match Phrase**

Click create new match phrase to be taken to the [Utilities: Automated Messages: Match Phrases: New Match Phrase: Essentials](#) page.

**Download as a File**

Click on the disk icon to download your list of match phrases in CSV format.

# Utilities: Automated Messages: Match Phrases: New/Edit Match Phrase: Essentials

---

## Search Phrases

Determines the word or phrase that will trigger the action set below. For example, if the phrase were "make money fast," a message which used this phrase would trigger this action. Instead of their message going to the mailing list, the sender would receive a document via email. This is an effective way to block unwanted topics on your mailing list.

You can have several phrases, any of which will cause this action, by entering several phrases in the field. The phrases must be entered one on each line, for example:

```
viagra  
make money fast
```

For power users, match phrases support regular expression for matching text. To specify that a given match phrase text is a regular expression you surround the text with / characters, as in: /regexp/ (Note: Regular expressions are a sophisticated mathematical description for text matching patterns).

## Reject this Message

Set whether or not the message will be rejected based on the inclusion of a match phrase entered above. If set to "Yes," the message will be rejected, and can be done with or without a response document; if set to "No," the message will be accepted, with or without a response document. The default is set to "Yes".

## Response Documents

Determines what response, if any, when this match phrase is triggered. The default is set to "(none)".

If you select a document from the drop-down menu, this document will be sent to the person who sent the message. Note that for documents to appear in this drop-down menu, they must first be created in [Utilities: Automated Messages: Document Content](#).

If you choose "(none)" then no document will be mailed back and the email message that caused the "match phrase hit" will be accepted or rejected based on the above setting (without sending a document back to the sender). You can use this "(none)" match phrase response to stop mail loops or to blacklist people that you don't want accessing your server.

**To summarize, when a match phrase is found, there are four options, based on the above settings:**

1. Reject the message with *no* response document (reject = yes, response document = none )
2. Reject the message *with* a response document (reject = yes, response document = any from the list)
3. Accept the message with *no* response document (reject = no, response document = none)



4. Accept the message *with* a response document (reject = no, response document = any from the list)

## Utilities: Automated Messages: Match Phrases: New/Edit Match Phrase: Advanced

---

### Rule

Determines the portion of the incoming email message that will be checked for the match phrase. The entire message, or some subset of it (the first line, the From: line, etc.).

### Notify Email Addresses

If filled in, these email addresses will receive a notification when this match phrase is triggered.

The notification will include the full document text that caused the match phrase to trigger. If you want to specify several email addresses to be notified, put each address on a separate line:

```
jane@yourcompany.com  
joe@yourcompany.com
```

### Replace With

Replace any matched text with this text.

(Note: This feature does not work with regular expressions as match phrases.)

This option is extremely useful for announcement lists, as it can be used to provide transparent posting security, so that only you are allowed to send to your mailing list, with 100% security. No one else is able to and you do not have to do anything special once it is set up.

For example, you can create a match phrase which refuses any postings that do not have your signature line in them and changes your signature in a subtle way, perhaps changing a comma to a semicolon, so that the match phrase which allows posts is no longer present.

Or, if you are using a particular version of a mail program, which adds its own header to every message (example: "X-Mailer: MS Mail 3.412") you can set your list up to refuse any message that doesn't have a particular characteristic.

Another use is to require a certain password to be included in every posting, and all postings without that password are rejected.

If you do not use the "Replace With" feature, then the key phrase, which allowed the message to go through, is visible in your postings. Thus, it is possible that someone would take your example message, change a few things, and attempt to forge the message as if it came from you. Because the key phrase is visible in the posted message, someone can exploit this. This is unlikely, but it is possible.

There are some malfunctioning mail server programs which take locally undeliverable mail and return it in such a way that it looks exactly like the original post. ListManager almost always catches this problem (because they have headers in them that ListManager added to catch this) but, the same technique is possible by someone who is dishonest.

The "Replace With" feature allows you to change (or erase) the key phrase which allowed your message to be posted. Say, for example, that you set your match phrase to refuse all postings that do not contain "X-Mailer: MS Mail 3.412" in their header. Messages that are accepted should change this key phrase to have a slight difference, say: "X-Mailer: MS Mail 3.413". There is no way for others to know that the "2" changed to a "3," and hence no way for them to bypass your security.

Other headers can be used as well. For example, have the match phrase be a particular "Received" header, which indicates from where the message came from. Set your match phrase to look for a Received: header that only your internal network would generate. Set your match phrase to refuse messages, which do not have this, Received: line, and then slightly alter the Received: line so that others do not know what the key is to get in.

This feature can also be used to implement password based posting, which means any contribution that does not have the posting password is refused. For example, set your match phrase to refuse any posting which does not contain the word "open sesame," then set the match phrase to Replace With a space (" ") thus, erasing the password.

### **Applies To**

Determines in which cases ListManager will check for this Match Phrase. The choices are:

#### **Mailing List**

Applies to the mailing list that is selected.

#### **All Mailing Lists on This Site**

Applies to all lists on the site. Available only if you are creating a match phrase as a site admin.

#### **All Mailing Lists on This Server**

Applies to all lists on this server. Available only if you are creating a match phrase as a server admin.

#### **Mail Sent to the Listmanager@ Command Address**

Applies only to mail sent to the listmanager@ address for this server. Normally, Match Phrases are applied to the mail sent to a mailing list. With the "listmanager@" setting, mail sent to the ListManager Address is checked for match phrases. This lets you add additional commands to the ones that ListManager normally understands. For instance, if you want to offer an application form for joining a mailing list, you could create a match phrase for "get application" which responds by sending back the application form.

### **Admin Access Level**

Select the desired list, site, or server from the drop-down menu. Server-wide match phrases can only be created or edited by server administrators. Match phrases for sites

can only be created or edited by site administrators, and list administrators can only create and edit match phrases for the lists accessible to them.

## Utilities: Automated Messages: Match Phrases: New/Edit Match Phrase: For Programmers

---

### Run Program Before

This setting allows you to extend the match phrase command processing with your own program. When the match phrase is triggered, your program will first be run and then your program can do any processing it wishes on the message. If your program wants to stop processing of the message, it can delete it.

### Run Program After

This setting allows you to extend the match phrase command processing with your own program. When the match phrase is triggered, your program will first be run and then your program can do any processing it wishes on the message.

## List Settings

### Utilities: List Settings

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Mailing lists are a set of email addresses who receive electronic mail as a group. Depending on what the goal of the group is, the features needed for the mailing list to work effectively will differ. For instance, a different set of features is needed if the group wishes to discuss an issue to come to a consensus, as opposed to a group who all receive announcements of new classical music recordings.

List settings govern how your list works. When you create your list, the type of list you selected determined the settings for your list. These settings are appropriate for most lists like yours, but you may want to fine-tune these settings.

#### Basic Information

The basics for your list:

- Specify the [topic and description](#) for your list.
- Specify what kinds of email delivery and subscription [reports](#) you'd like to have emailed to you.
- Specify whether or not you'd like to save [archives and recipient information](#), or whether the list should allow postings through other ListManager lists.
- Set whether or not you'd like set open tracking and HTML detection as [defaults](#).
- [Disable the list](#), or set a maximum number of members.

## **New Subscriber Policy**

Control how people join your list:

- Specify whether new subscribers must [confirm their memberships](#) by responding to a confirmation message, or confirm when they unsubscribe.
- Determine how [secure](#) your list is—can anyone join? Do they require a password, or is it private? Or can members only be added by an administrator? Can people subscribe by email, or only through the ListManager web interface?
- Specify who [can or cannot join](#) your list.

## **Email Submitted Content**

Control what mailings look like when sent via email to the list. These settings are not in effect when sending through the ListManager administration web interface in most cases.

- Specify what [text wrapping](#) should come at the beginning and end of every message sent via email to the list.
- Determine what [security](#) should be in place for email posting. Specify whether messages can be sent via email, and who can send to the list.
- Specify whether [approval](#) is required for email submitted messages.
- Specify what [additions](#) and [revisions](#) to the header should be made, such as the default From:, To: and Reply To: headers.

## **Web Created Content**

Control the default settings for content and mailings created through the ListManager administrator's web interface.

## **Automatic Maintenance**

Keeps your server running smoothly by removing bad email addresses:

- Specify when [members should be held](#) (no longer delivered to) due to delivery problems.
- Specify how frequently to [purge inactive members](#) from the database.
- Specify [how long to keep message archives](#).

## **Users' Web Interface**

Determine how you'd like your list to work if list members access it through the ListManager web interface:

- Specify [message reading](#) settings: who can see the list's messages, and what methods they may use.

- Specify [new membership requirements](#) if subscribing through the ListManager web interface.
- Provide [information about your list](#) in the ListManager web interface.
- Limit access to ListManager's [conferencing](#) feature.

### Discussion Group Features

Determine settings primarily used in discussion groups (those where recipients can also send messages to the list):

- Specify how the [message looks](#): whether or not to prepend the list's name to the Subject: line, or whether postings can be anonymous
- Specify [message wrapping for digests](#).
- Specify posting [security](#): who can write to the list, and who can see the list of members.
- Specify automatic reasons to [reject messages](#).

### For Programmers

Allows programmers additional control over what messages should look like.

- Specify who is allowed to include [scripting](#) in messages, including mail merge and conditional text.
- Specify programming [extensions](#) to be run before and after messages.

### Map of All Settings

A site index of all the list settings.

## Basic Information

# Utilities: List Settings: Basic Information

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Utilities: List Settings: Basic Information contains the most fundamental settings for your list. In this section, you may:

- Specify the [topic and description](#) for your list.
- Specify what kinds of email delivery and subscription [reports](#) you'd like to have emailed to you.
- Specify whether or not you'd like to save [archives and recipient information](#), or whether the list should allow postings through other ListManager lists.

-Set whether or not you'd like set open tracking and HTML detection as [defaults](#).

-[Disable the list](#), or set a maximum number of members.

## Utilities: List Settings: Basic Information: Basics

---

### List Name

The name of the mailing list. This name is the official Mailing List Name - it is what both administrators and users will see in correspondence to the list. It also defines the email address for list mail. For example, if the name is *jazz-discuss* and the Site's host name is *minerva.example.com*, the mailing list's email address will be

```
jazz-discuss@minerva.example.com
```

### Rename List

Clicking this button makes the list name editable. Enter the new list name and description, and click **Save**. Available for site and server administrators only.

**NOTE** Renaming a list may take a long time, depending on the number of members, documents, segments, archives etc. that need to be renamed in order to remain associated with this list. Renaming a list may slow mailings currently being processed.

### List Description

(required) A very short description of the mailing list, which may be visible to users. Do not use any commas or "<" or ">" characters in your description.

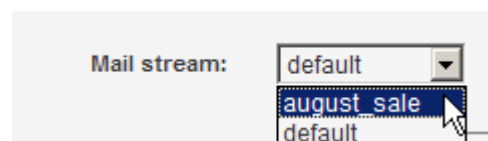
When email goes out from the list, this description can be in the email message. For example, if the Description is *Jazz Discussion*, the Reply-To: field for the mailing list email address will be:

```
Reply-To: Jazz Discussion <jazz-discuss@minerva.example.com>
```

### Mail stream

#### To select a mail stream

Click the **Mail stream** drop-down list, and then choose the mail stream you want.



[Mail streams overview](#)

[Create a new mail stream](#)

## Utilities: List Settings: Basic Information: Reports

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### Subscription Reports

You may have ListManager send list administrators a regular email report on how your list membership has changed. These reports include the following information for the period specified: confirmed and unconfirmed new members, unsubscribed members, and held members.

By default, no subscription reports are emailed to you. You may have a report sent daily, weekly or monthly. You may choose more than one report if you like, which allows you to receive reports at any interval you wish.

You also have the option of receiving short, normal or detailed reports. The short report does not list a day if there is no pertinent information for that day. The detailed report includes members' email addresses.

For example, here is a sample "normal" report:

```
Grand total members by type for 'list2'
- Normal members: 3
- Unsubscribed members: 2
For dates from 1999.08.13 to 1999.08.19 members by type for
'list2'
- New normal members: 1
- New unsubscribed members: 1
-----
Members by type for list2 for dates from 1999.08.13 to
1999.08.19
---
1 members who subscribed:
1999.08.13
1999.08.14
1999.08.15
1999.08.16
1999.08.17
1999.08.18 * 1
1999.08.19
---
1 members who unsubscribed:
1999.08.13
1999.08.14
1999.08.15
1999.08.16
1999.08.17
1999.08.18
1999.08.19 * 1
```

Notice that there are several dates that do not have any data. When you opt for the "short" report, this section looks more like:

```
Grand total members by type for 'list2'
- Normal members: 3
- Unsubscribed members: 2
For dates from 1999.08.13 to 1999.08.19 members by type for
'list2'
- New normal members: 1
- New unsubscribed members: 1
-----
Members by type for list2 for dates from 1999.08.13 to
1999.08.19
---
1 members who subscribed:
1999.08.18: 1
---
1 members who unsubscribed:
1999.08.19: 1
```

When you opt for the "detail" report, the report has an additional section at the end of the general data section. This additional section includes the email addresses associated with the data points present in the general data section. An example of the detail report:

```
Grand total members by type for 'list2'
- Normal members: 3
- Unsubscribed members: 2
For dates from 1999.08.13 to 1999.08.19 members by type for
'list2'
- New normal members: 1
- New unsubscribed members: 1
-----
Members by type for list2 for dates from 1999.08.13 to
1999.08.19
---
1 members who subscribed:
1999.08.13
1999.08.14
1999.08.15
1999.08.16
1999.08.17
1999.08.18 * 1
1999.08.19
Email address detail:
1999.08.18 1
vince@tile.net (Tile Vince)
---
1 members who unsubscribed:
1999.08.13
1999.08.14
1999.08.15
1999.08.16
1999.08.17
1999.08.18
1999.08.19 * 1
Email address detail:
1999.08.19 1
vince@redmood.com (Vince Redmood) [joined 1999.08.19, member for
0 days]
```

Subscription reports are an easy way to keep track of those who have subscribed and unsubscribed recently. These are very useful in maintaining external databases or tracking the growth of your list.

## Delivery Reports

ListManager can send the list administrators of a mailing list regular progress reports on how each mailing is progressing. The Delivery Report indicates when the message was attempted, how many members received it and when the next retry is scheduled for the remaining members. It is a snapshot of the progress of the mailing.

You may also opt to receive a detailed SMTP report addendum to the delivery report, which includes the reason ListManager couldn't send mail to each undeliverable member. This SMTP report is an HTML report.

You have the option of setting Delivery Reports to go out at these intervals:

- Do not email delivery reports to list admins (default)
- Report after one (1) hour



- Report after four (4) hours
- Report after twelve (12) hours
- Report after twenty-four (24) hours
- Report after forty-eight (48) hours
- Report after thirty days.

Note that multiple delivery report times can be selected by holding the Ctrl key.

The delivery reports go to all the members of a list who are set to "receive admin mail".

Here is an example of a delivery report:

## Delivery report

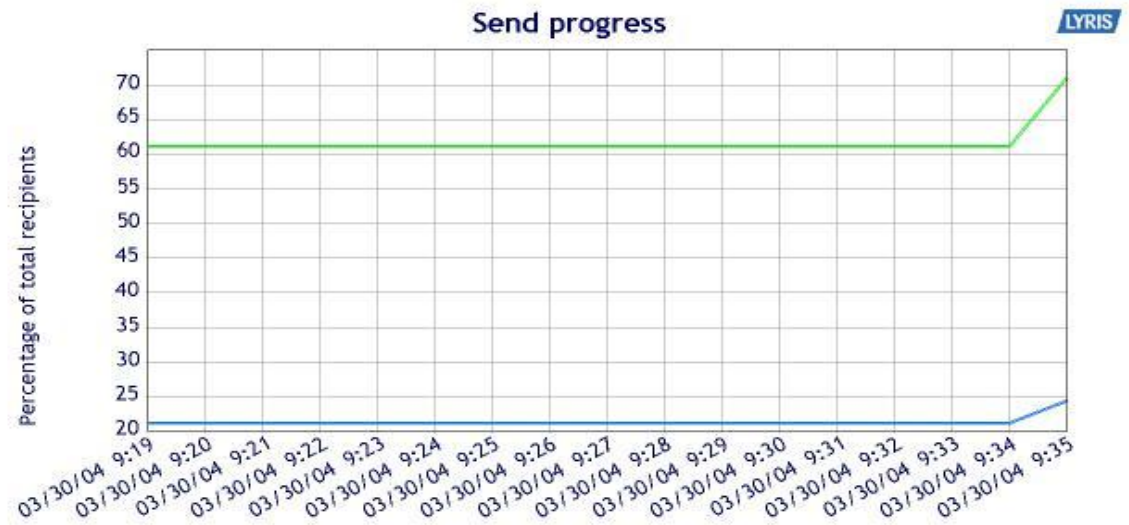


List: 'newsletter' Mailing: '8/26/2003 2:17:58 PM'

**Summary:** It has been 1 hour since delivery started for this posting. In this time 100% of the recipients have been attempted, with an overall success rate of 24%.

### Delivery success percentages over time for this mailing:

 = Success  
 = Failure



Domain	Recipients (% of total)	Attempted (% of domain)	Success %
hotmail.com	500 (95%)	500 (100%)	21%
yahoo.com	7 (1%)	7 (100%)	85%
aol.com	3 (0%)	3 (100%)	100%
juno.com	2 (0%)	2 (100%)	0%
attbi.com	2 (0%)	2 (100%)	100%
All other domains (10)	11 (2%)	11 (100%)	81%
TOTAL	525 (100%)	525 (100%)	24%

### Useful links:

- View [all recipient details](#)
- View [all delivery problems](#)
- View [all message details](#)
- Chart of [attempted and completed counts](#)
- View the selection of [all ListManager delivery reports](#)

Recipients with "transient" problems may yet be delivered to in a retry unless all delivery attempts have been completed. If a recipient's mailserver replies with a 500 or higher response, it is considered currently unreachable and will not be retried in this send.

## Utilities: List Settings: Basic Information: Enable Features

---

### Archive Messages

Determines whether messages sent through this list will be available in the list's message archives. Archiving is necessary to read and search messages posted through ListManager through the [Discussion Forum Interface](#), [RSS](#) or [NNTP](#). Digest and index editions of the list's postings also depend on there being archives for at least one day.

Not saving archives conserves disk space.

If you want your users to be able to receive digest or index editions, but do not want to keep archives, set the Save Archives setting to "Yes..." and set the Archive Days setting to "1" in [Utilities: List Settings: Automatic Maintenance: Purging Archives](#).

### Recipient Logging Level

Transaction logs are created at the individual recipient level. Set the desired level of detail for the transaction logs from the drop-down menu. The choices are:

- **No logs** - creates no transaction log for recipient information. This is the default setting.
- **Non SMTP errors** - Shows error information, but does not include SMTP information.
- **All errors** - displays detailed information about all errors, including the errors which may have occurred when communicating with the mail server (SMTP errors). Given sufficient server resources, this setting is recommended.
- **Errors and Successes** - Displays detailed information about every transaction, creating a full log for both errors and non-errors. This option may consume significant server space, since it will log information for each recipient.

The default setting is "All errors." Creating a full log can hinder performance, as these logs can become large files, particularly for large lists with many members.

If the Bounce handling setting in [Utilities: Administration: Server: Server Settings: Automatic Maintenance: Error Mail](#) is set to "Yes, process all bounce reports in memory (faster)", then the following message will be visible below the recipient logging level:

Note: the server setting for Bounce Handling is set to process bounces in memory. Therefore, bounce information will not be available in the recipient logs.

The bounce handling link will take you to the [Utilities: Administration: Server: Server Settings: Automatic Maintenance: Error Mail](#) page, where the setting can be adjusted if necessary.

### **Enable This List as a Child List**

This setting determines if this mailing list will accept messages submitted directly from another mailing list.

This option is used to create parent/child mailing lists, where sending mail to a parent list automatically sends to a child mailing list.

A typical scenario for setting up parent/child list is if you have multiple announcement lists and they are related in this way. For example, these lists could be in a parent/child relationship:

sports-announcements  
soccer-announcements  
tennis-announcements

If lists are set up in a parent-child relationship, messages you send to "sports-announcements" can be sent to members of "soccer-announcements" and "tennis-announcements" automatically. Or, you may just want to send to "tennis-announcements" and not to any other list.

Here are the instructions for setting up a parent/child list. Please follow these directions carefully, as the relationship is a little difficult to grasp:

1. First, create your parent and child lists as you would create any ordinary lists (you will later establish the parent-child relation between them). You should not use [message wrapping](#) in any list that will act as a parent, as these header/footers will be reproduced when the messages are posted to the children.
2. For each child list, go to Utilities: List Settings: Basic Information: Enable Features, and set Enable This List as a Child List to **Yes**.
3. For each child list, go to [Utilities: List Settings: Discussion Group Features: Message Rejection Rules: Same Message Rules](#) and set Allow Duplicate Posting to **No, Duplicate Postings Should Be Rejected**.
4. For each child list, go to [Utilities: List Settings: Discussion Group Features: Message Rejection Rules: Same Message Rules](#) and set Allow Cross-Posting to **No, Cross-Posted Messages Should Be Rejected**.
5. For each child list, go to [Utilities: List Settings: Discussion Group Features: Message Rejection Rules: Same Message Rules](#) and set Cross-Posting and Duplicates to **Make Sure that Multiple Copies of Cross-Postings are Removed**.

6. For each child list, go to [Utilities: List Settings: Basic Information: Enable Features](#) and set Archive Messages to **Yes, save and archive messages sent on this mailing list**.
7. Decide who should be able to post to your mailing lists and make them a member of all the lists (parents and children) that their message should be distributable to. A person has to be a member of the parent and all its children in order for the message to be distributed. You should also set the security permissions for this person so that their post goes through the security tests you decide. For instance, you may want to allow any post from the person to automatically be approved, in which case making this member a list admin on the lists is best.
8. In each list that is to serve as a parent list, subscribe the child list's posting address as a member of the parent list. For example, you would create two members in "sports-announcements", with the email addresses "soccer-announcements@yourserver.com" and "tennis-announcements@yourserver.com". Child lists can also act as parents to other lists, so you can nest the parent/child relationship as deeply as you like.

If you have configured the lists to reject cross-posted duplicates, you will prevent members of multiple child lists from getting many copies when a message is sent via the parent list.

### **Default Segment**

Select the default segment mailings should go to when administrators create new mailings through the administrative interface. By default, mailings will go to the entire list.

Some administrators may wish to specify a segment with administrators only as a safety measure so that if the sender neglects to specify the correct segment the mailing does not go to the entire list.

Sending to segments is a pro level feature. If you would like to send to segments, please contact your account representative at [sales@lyris.com](mailto:sales@lyris.com).

### **Enable DomainKey Signatures**

You can enable DomainKeys at the list level, and specify whether this setting acts in conjunction with the site level setting or independent of it.

[Domainkeys FAQ](#)  
[Setting up and using Domainkeys](#)

#### **Use the site setting for this list:**

Uses DomainKeys, or not, depending on the "yes" or "no" setting you chose in the Utilities > Administration > Sites > New/Edit Site > DomainKeys tab (i.e., the site level setting).

**Use the site setting for this list, but do not add Sender Header if signing** : Uses the settings you chose in the DomainKeys tab, but does not include a Sender heading regardless of site/domain matching (see the note below).

**Yes, enable for this list:** Uses DomainKeys regardless of the the "yes" or "no" setting you chose in the Utilities > Administration > Sites > New/Edit Site > DomainKeys tab (i.e., the site level setting).

**Yes, enable for this list, but do not add Sender Header if signing:** Uses DomainKeys regardless of the the "yes" or "no" setting you chose in the Utilities > Administration > Sites > New/Edit Site > DomainKeys tab. Does not include a Sender heading regardless of site/domain matching (see the note below).

**No, disable for this list :** Does not use DomainKeys regardless of the "yes" or "no" setting you chose in the Utilities > Administration > Sites > New/Edit Site > DomainKeys tab.

### **Default Recency Limit**

ListManager allows you to exclude those who have received a certain amount of mail recently from receiving more mailings. By default, ListManager will send to everyone regardless of how much mail they have received recently.

Setting a recency limit for the list allows you to prevent recipients from mailings if they have received the amount of mail you specify here from any list on the server. In other words, mailings from any list "count" towards the tally of mailings to a particular address.

For example, if joe@example.com received four messages in the past week from list\_a, and there is a recency limit on list\_b to purge recipients who have received more than three mailings in the past seven days, joe@example.com will not receive the mailing to list\_b, even though the messages joe@example.com received were from a different list.

By default, no recency limit is set. To set or edit your recency limit, click edit recency. You will be taken to [Utilities: List Settings: Basic Information: Choose Recency](#). To remove a previously set recency setting, click clear recency.

This limit may be overridden on the [recipients](#) tab when creating mailings.

### **Default with Open Tracking**

This option determines whether the list will provide open tracking by default or not. This is enabled by default for marketing list types, for other list types it can be set here to "yes" or "no".

Note that this feature is for reporting of email opens; if this is set to "no", it will appear as though there were no opens, which is most likely not a realistic number.

Opens cannot be tracked for recipients who cannot see HTML; however, if a clickthrough is registered for a recipient for whom there has been no opens, an open is registered for that recipient.

### **Default with HTML Detection**

This option determines whether the list will detect HTML by default or not, that is, whether or not recipients can read and/or send HTML. This is enabled by default for marketing list types, for other list types it can be set here to "yes" or "no".

This is a reporting feature, and if set to "no", it will appear as though no recipients can detect HTML, which may not be a realistic number.

## Warn Sender if No Recipients Found

ListManager can inform the administrator sending a mailing that no recipients were found, and thus no mailing sent. It is possible that no mailing may be sent if it is queued for a segment without recipients, or to a segment or list that has already received an identical message and thus duplicate messages for these recipients have been automatically purged.

When set to "yes", this option informs the sender via email if a mailing was not sent because no recipients were found to receive the message. Set to "no" if you do not want senders to be informed.

## Choose Recency to Purge By

---

ListManager allows you to exclude those who have received a certain amount of mail recently from receiving more mail. By default, ListManager will send to everyone regardless of how much mail they have received recently. Setting a recency limit for the list allows you to prevent members from receiving email if they have received the amount of mail from any list on the server in the number of preceding days that you specify here.

You may override these settings on a per-mailing basis on the [Mailings: New Mailings: Recipients](#) tab.

Note that by default recency is disabled for all mailings by default. You must set "Enable recency" for one of the types of mailings in order to limit receipt of mail.

### Purge email addresses who have received

Specify whether to exclude those who have received *more than*, *fewer than* or *exactly* the number of email messages specified in *this number of mailings*.

### this number of mailings

Specify the number of mailings that will limit who will receive this mailing. Only mailings will be considered (email messages sent to the list or to subsets), not automated messages (e.g., welcome messages). Mailings from any list on the server will count towards this number.

### in this past number of days

Specify the number of days to check for the number of mailings specified.

When a recency limit is specified, ListManager will add an *X-LYRIS-Recency* header to the mailing that will limit who receives the mailing when actually sent. Example:

```
X-LYRIS-Recency: match=m,msgs=3,days=7
```

This sample header limits those who receive more (m) than 3 mailings in the past 7 days. Match options in the header are (f)ewer, (e)qual, or (m)ore than the number of mailings specified.

### Enable for email-submitted content?

Specifies whether recency rules should be automatically applied to mailings received via email or submitted through the discussion forum interface, versus mailings created through the admin interface. Set to "no" by default.

#### **Enable for web-submitted content?**

Specifies whether recency rules should be automatically applied to mailings created through the admin web interface. Set to "no" by default.

#### **Enable for triggered mailings?**

Specifies whether recency rules should be automatically applied to triggered mailings, versus mailings created through the admin interface. Set to "no" by default.

#### **Enable for sequential mailings?**

Specifies whether recency rules should be automatically applied to sequential mailings, versus mailings created through the admin interface. Set to "no" by default.

## **Utilities: List Settings: Basic Information: Limits**

---

### **Disable This List**

This option allows a site or server administrator to prevent mailings from a list. By default, it is set to No, meaning the list functions normally.

The disabled list will accept subscribe and unsubscribe requests, but no new mailings will be distributed to the mailing list. The ability to disable a list is only available and visible to site or server administrators.

### **Max # of Members**

This option allows a site or server administrator to set an absolute limit on the number of members who can subscribe to a mailing list. When the maximum number is reached, the list itself will still allow mailings to be sent, but no new members will be allowed to join via subscription through email or a web form.

This feature is only available and visible to site and server admins.

If you have limited the membership size of a list, ListManager will send you a message if you are approaching the member limit. While ListManager is processing your add request, it also checks to see how close you are to your member limit. If your add request brings your list to within 5% of the limit, ListManager will inform you in the email notification you receive.

Below is an example of what ListManager sends you when your member list is approaching its limit:

```
Note: This list is close to its maximum subscriber limit, with only 5 new subscriber positions available.
```

Please note that this limit only applies for subscriptions received through ListManager. If members are directly added to the SQL Server database, this member limit logic is ignored.



## Max Referrals Per Day

The maximum number of referrals a member can make per day. Some members may abuse the referral feature by inviting people in order to harass them. Specifying a maximum number of referrals a member can make per day limits the damage from such people.

## New Subscriber Policy

# Utilities: List Settings: New Subscriber Policy

---

Utilities: List Settings: New Subscriber Policy settings control how people join your list. You may:

- Specify whether new subscribers must [confirm their memberships](#) by responding to a confirmation message, or confirm when they unsubscribe.
- Determine how [secure](#) your list is--can anyone join? Do they require a password, or is it private? Or can members only be added by an administrator? Can people subscribe by email, or only through the ListManager web interface?
- Specify who [can or cannot join](#) your list.

# Utilities: List Settings: New Subscriber Policy: Confirmation

---

## Confirm Subscribes

Defines whether new members receive a confirmation request when joining the mailing list. The confirmation request will be an email message telling the person that they have requested to join this mailing list, and that the person will have to respond to the confirmation message in order to become a full member. The new member's status will be set to *confirm* until the confirmation response is received, and the person will not receive mail from the mailing list until the confirmation is received.

The reply-to email address given in the subscription confirmation request message will be a unique address for that member. You may want to include this address in the body of a customized confirm document you send out. Thus, the reply-to address is constructed by using the following text:

```
lyris-confirm-%%memberidchar%%@yourdomain.com
```

This failsafe confirm address allows a member to reply to a single confirmation request and confirm their membership for all their lists. The contents of the reply is irrelevant, so long as it is addressed to the confirm address.

If a member visits your Web site and signs up for four of your lists, you can have ListManager send the new member a single confirmation message for all four lists by

using the "oneconfirm" option of the "add" command. When the member replies to this one confirmation request message, the reply will go to the failsafe confirmation address. When ListManager receives mail at this address, ListManager will confirm all outstanding confirmation requests for that member. Prospective members cannot confirm to some lists but not others.

Confirmation serves several purposes. It is quite common for people to mistype their email address when subscribing to a mailing list using the web interface. Without confirmation, ListManager would waste effort trying to send mail to this incorrect address.

Another need for confirmation is to counter a common form of electronic harassment. The harasser will sign someone they wish to harm to many mailing lists (perhaps several hundred), and that person will then be flooded with unwanted electronic mail. If that person's email server is not perfectly configured, the email server may crash, or prohibit other people sharing the email server from receiving their email. At the very least, it will use bandwidth and other resources.

The Confirmation feature blocks this form of electronic harassment. If the harasser subscribes someone to 100 ListManager mailing lists (all with *Confirm* set to *Yes*), the person will receive 100 confirmation messages but no further messages. If the person does not respond to the subscription confirmation messages (as they should not), the memberships will not be activated.

We highly recommend that all [Open mailing lists](#) use the Confirm feature as this form of electronic harassment is quite common and is very bothersome to the victim.

### **Confirm Unsubscribes**

This setting determines whether email requests to unsubscribe are immediately acted upon by ListManager, or whether it will send a request to the member asking them to confirm that they want to unsubscribe from the list.

The three options for Confirming Unsubscribes are to confirm only questionable unsubscribes, to confirm all unsubscribes, and to never confirm unsubscribes (the default setting).

For announcement lists we *strongly recommend* that you use the default setting, and that you do not use the setting that requires confirmation of all unsubscribes. Announcement list members will tend to find this extra step frustrating, and may accuse you of being a spammer.

If an unsubscribe confirmation email message is sent, the message will tell the person to reply to the given message, if they want to be unsubscribed, or to ignore the message if they do not want to unsubscribe. Once a person responds to the confirming email to confirm leaving the list, they will receive the ListManager default goodbye message. Members who confirm their unsubscribes will not receive any Goodbye document you specify for the list.

One reason to confirm unsubscribes is that people are sometimes nasty and will try to unsubscribe people that they do not like. They can do this by forging an unsubscribe request and sending it on behalf of that person.

Another reason to confirm unsubscribes is when you are using the "failsafe unsubscribe" %%email.unsub%% address in your message. This mechanism places

the recipient's email address and unsubscribe email address at the bottom of their message. If someone forwards this message to another, that person could unsubscribe the subscriber by following the unsubscribe instructions in the message.

Because most lists are not subject to this problem, the default is to never confirm unsubscribes. If you are concerned about people unsubscribing others, use the setting that confirms only questionable unsubscribes. With this setting, only when a unsubscribe request comes from an address different from that subscribed to the list will the member receive a confirmation request.

## Utilities: List Settings: New Subscriber Policy: Security

---

### Security

Defines how secure the list is to new subscriptions. The possible choices are:

#### **Open**

Anyone can join (no approval needed).

#### **Private**

The administrator must approve new members.

#### **Password**

New members need to know the password to join.

#### **Closed**

Only an administrator can add new members.

An **Open** mailing list allows anyone who finds this mailing list can join, either by email or by using the web interface. After joining (and possibly confirming the membership), this person will have full member status.

A **Private** mailing list prevents anyone from finding the mailing list from joining immediately. When they attempt to join, (either by email or using the web interface) a List Administrator will have to approve their request to join before the person becomes a member. List Administrators who have their settings defined to receive [Admin Mail](#) will receive an email notice when a person requests to join a Private mailing list. When the list admin receives a request to join a private list and the request was done by email, the notification email message that ListManager sends out also includes the original requestor's email message, which can be helpful determining if the person should be allowed onto the list.

If the admin changes the potential member's status from Needs Approval to Normal through the web interface (not via email), the new member will not receive a Hello message unless the status is changed to Needs Hello.

A **Password** protected mailing list allows anyone who finds this mailing list can join (either by email or using the ListManager web interface) and will be automatically approved only if they know the password. If they do not know the password, they will be

automatically rejected. The password is defined in a field further down this page. For subscription requests that arrive via email, the password is entered at the end of the subscription request, as in:

*subscribe jazz-discuss open-sesame*

A **Closed** mailing list is one in which non-members are not able to apply for membership. If a request for membership arrives by email, it will be automatically denied. On the ListManager web interface, the *Subscribe* button will not be a choice. New members to a Closed mailing list must be added by the List Administrator.

You can change the Security status of a mailing list at any time. For instance, you can start out as an Open mailing list (so that anyone can join) and then become a Private mailing list (so that new members must be approved by a List Administrator).

### **Password**

If the list Security (above) is set to Password, this field defines the password required for new members to join the mailing list.

### **Allow Joining by Email**

This setting determines whether subscription requests by email will be accepted. By default, members can join a mailing list using the ListManager web interface or by sending a "subscribe" email command to ListManager.

If you want to require people to join using the ListManager web interface, you can change this setting so those requests to join by email are rejected. Note that disallowing joining by email may disable some web based subscription methods that depend on email to submit a request to join.

## **Email Submitted Content**

### **Utilities: List Settings: Email Submitted Content**

Utilities: List Settings: Email Submitted Content controls what messages look like when sent via email to the list. These settings are not in effect when sending through the ListManager administrator's web interface in most cases. To configure the defaults for mailings created through the administrator's web interface, see [Utilities: List Settings: Web Created Content](#).

-Specify what [text wrapping](#) should come at the beginning and end of every message sent via email to the list, and optionally through the web interface..

-Determine what [security](#) should be in place for email posting. Specify whether messages can be sent via email, and who can send to the list.

-Specify whether [approval](#) is required for email submitted messages.

-Specify what [additions](#) and [revisions](#) to the header should be made, such as the default From:, To: and Reply To: headers.

# Utilities: List Settings: Email Submitted Content: Message Wrapping

---

This text will be prepended or appended to the email message body when the message is sent to the list via email only. These settings are not in effect when sending through the ListManager administration web interface unless they have been enabled in [Utilities: List Settings: Web Created Content](#).

Different headers and footers may be added to digests in [Utilities: List Settings: Discussion Group Features: Message Look](#).

In addition, site or server admins may add message wrapping to messages in [Utilities: Administration: Sites: Edit Site: Message Wrapping](#) and [Utilities: Administration: Server: Server Settings: Advanced: Message Wrapping](#).

## Text Header

If specified, adds this text to the top of every text message body received via email and optionally through the web interface.

## Text Footer

If specified, appends this text to the bottom of every text message body received via email and optionally through the web interface. When you create a mailing list, ListManager defaults to putting a footer at the bottom of every message which tells the recipient what email address they are subscribed with, and how to unsubscribe.

The text of the default text footer is:

---

You are currently subscribed to %%list.name%% as: %%emailaddr%%.  
To unsubscribe click here: %%url.unsub%%  
or send a blank email to %%email.unsub%%

This footer uses the mail merge fields to allow failsafe unsubscribing.

You can change this footer to be anything you like, or remove it completely.

## HTML Header

If specified, adds this text to the top of every HTML message body received via email and optionally through the web interface. It should be formatted in HTML to display properly.

## HTML Footer

If specified, appends this HTML to the bottom of every text message body received via email and optionally through the web interface. When you create a mailing list, ListManager defaults to putting a footer at the bottom of every message which tells the recipient what email address they are subscribed with, and how to unsubscribe.

The text of the default HTML footer is:

```
<html><p>---<p>You are currently subscribed to %%list.name%% as:
<a href="mailto:%%emailaddr%%">%%emailaddr%%</a>.<p>To unsubscribe click
here:
<a href="%%url.unsub%%">%%url.unsub%%</a><p>
(It may be necessary to cut and paste the above URL if the line is broken)
<p>or send a blank email to <a
href="mailto:%%email.unsub%%">%%email.unsub%%</a></html>
```

You can change this footer to be anything you like, or remove it completely.

## Utilities: List Settings: Email Submitted Content: Security

---

### Reject Email Submissions

This setting determines whether all submissions sent via email should be automatically rejected. By default, your list is set to allow submissions by email. If you change Reject Email Submissions to "Yes", then any email that is sent to the list will automatically be rejected. Only postings made through the ListManager web interface or via a script will be allowed.

Email can fairly easily be "spoofed"; that is, someone can make the email appear to be from someone it isn't from. Thus, email is not a very secure mechanism for authenticating users. Someone malicious can configure their email program to be someone else and send messages as if they were that person.

In most mailing list situations, users behave ethically, and do not impersonate others, so the risk of abuse is minimal.

However, you may have a need to have as much security as possible so that there is very little risk of improper email getting posted to your list. In such a case, you might want to disallow all postings over email. Only postings through the web interface or postings made with a script will be allowed. Note: These postings will be subject to normal security settings, such as moderation, match phrases, etc.

### Only Admins Can Send

When set to Yes, only List Administrators are allowed to contribute messages to the mailing list. Any member who attempts to contribute a message will have their contribution automatically rejected. The Admin Send feature is useful for announcement or email marketing type mailing lists, where a select group is allowed to post to the list, but where all other members should not be allowed to post to the list.

By default, this setting is set to Yes (only admins can send) for Email Marketing and Announcement lists created through [Utilities: Administration: Lists: New List](#).

### Require Password in Body

This option determines whether lists postings contributed by email require senders to include their personal passwords in the following format:

PASSWORD:your\_password

"PASSWORD" must be capitalized, and there may be no spaces.

For example, if you are posting to a list that requires the password in the body, and your password is "sw33t", you would include the following in your messages:

```
PASSWORD:sw33t
```

Your password will be automatically removed before your message is distributed so others won't see it.

Passwords will only be required for members who have passwords. If certain members do not have passwords, this option will not have any affect on their ability to post messages to the list.

If you want all members to have passwords, and for their passwords to be required in all list postings, you should also set "Require Password" to be true. "Require Password in Body" (as distinct from "Password Required") requires that all members have passwords. See [Utilities: List Settings: Users' Web Interface: New Subscriber Requirements](#) for more information.

Including a password in an email message is inherently insecure. If you are concerned about password security, do not require a password in the body of the message.

## Utilities: List Settings: Email Submitted Content: Approval

---

### Is List Moderated

Defines whether message contributions sent via email will be automatically approved, or if they need to be approved by a list administrator. All messages sent through the ListManager administrator web interface require approval. Messages sent by those who are not allowed to post to the list will be automatically rejected.

The options are:

#### **Not Moderated**

Messages never need approval.

#### **Moderated**

Messages always need approval.

#### **Number Moderated**

New members need to have a number of messages approved before they may post without approval.

A **Not Moderated** list allows all message contributions from those allowed to post to be automatically approved and be automatically distributed to the mailing list. This setting provides little security unless you use require a password in the body; see [Utilities: List Settings: Email Submitted Content: Security](#) for more information about this setting.

A **Moderated** list will hold all message contributions until they are approved or rejected by a List Administrator, or until the time set by Release Moderated Messages elapses. We recommend all messages be moderated if List or [Server Scripting/Merge](#) is set to Full Scripting/Merge in [Utilities: List Settings: For Programmers](#).

A **Number Moderated** list holds the first few message contributions of members for approval, like a Moderated list. Thereafter, they will be able to contribute messages without needing approval. The number of approvals new members need is set by the next field, Approve # for Number Moderated.

If the Moderated setting is changed to Number Moderated after the list is created and people have joined, only the members who join after the change will be Number Moderated. The pre-existing members will be considered as having passed their initial approval requirements. If the Moderated setting is changed from Number Moderated to another setting, the new setting will apply and members who still had a number of messages to be approved will instead be held to the new Moderated setting.

List Administrators who have their settings defined to receive Admin Mail will receive an email notice when a message has been contributed and needs approval. The List Administrator will then use either [Mailings: Need Approval](#) or email commands to approve or reject the message contributions. Or, if the mailing list is set to automatically Release Moderated Messages, the List Administrator does not need to do anything for moderated messages to be approved: the messages will be automatically approved after the release period has passed.

By default, this setting is set to Moderated for all lists except for unmoderated discussion lists.

### **Approve # for Number Moderated**

If Is List Moderated is Number Moderated, this setting defines the number of message contributions that new members need to have approved before they can contribute without being held for approval. If the Moderated setting is not set for Number Moderated, this field has no effect.

### **Automatically Release Unmoderated Messages**

Defines the amount of time that should elapse before messages held for approval are automatically approved if the list's Is List Moderated setting is set to Moderated or Number Moderated.

For example, if the release period is set to "The Same Day", messages held and waiting for approval will be automatically approved at midnight, the day of their contribution. The release feature allows list administrators to do nothing in the normal course of running their mailing lists. The list administrator will receive a copy of the message to be approved via email and if the message is acceptable, the List Administrator does nothing and the message is approved that night. On the other hand, if the message is not acceptable, the list administrator has until midnight to reject the message.

If the list administrator does not wish to use a release period, they can set it to Approval is Always Needed, which is the default for all lists.



Note: Messages pending approval or automatic approval will be viewable in Mailings: Approval, not Mailings: Scheduled.

### **Automatically Release Messages At**

If a moderated message is set to automatically release after a certain number of days, this setting determines the default time at which it will be released.

For example, if you set the time to 10 a.m., and Release Moderated Messages to "the same day", then ListManager will set all moderated messages submitted to this list to automatically approve at the next time Pam occurs. If you submit a message at 11 a.m. it will be set to automatically approve the next day at 10 a.m. If you submit the message at 9 a.m. it will automatically approve an hour later, at 10 a.m.

## **Utilities: List Settings: Email Submitted Content: Email Header**

---

### **Change Date to Send Date**

When a message is sent to a moderated mailing list, the Date: header of that message is set by the email program of the person sending the message.

However, if the message is approved at a later date, it is often best to have the Date: header of the message reflect the date when the message was sent by ListManager, rather than the authored date.

This setting sets the default for moderated messages to automatically rewrite moderated date headers. You can still choose to rewrite (or not) the date headers of individual moderated messages by using [Mailings: Need Approval: Edit Mailing: Schedule](#).

### **Add List Help Headers**

This option determines whether helpful information is inserted into the headers of the messages ListManager sends.

These header lines tell people how to subscribe, unsubscribe, get help and contact the owner of the mailing list.

These header lines are now an official Internet standard. ListManager complies with the standard document, titled The Use of URLs as Meta-Syntax for Core Mail List Commands and their Transport through Message Header Fields and available at

<http://www.isi.edu/in-notes/rfc2369.txt>

A number of email programs recognize the headers and assist users in subscribing, unsubscribing, or obtaining help. As of November 1, 1997, Claris EMailer, Qualcomm Eudora and Pegasus Mail directly support or plan to directly support these headers. Even when a mail program does not directly support the headers, they are still useful. Most email programs allow the user to optionally view all headers, and thus they can see this additional, helpful information.

If you decide to include the List-Help headers, these three header will be added to your outgoing mail:

```
List-Subscribe: <mailto:subscribe-list1@yourcompany.com>  
List-Owner: <mailto:owner-list1@yourcompany.com>  
X-List-Host: kuno.yourcompany.com
```

Note: Most email programs do not show the mail headers, so for most lists, it makes sense to include the headers, as they do no harm.

If you choose to not include the List-Help headers, only the List-Unsubscribe header will be included. This header is included by default, because it is the most useful header. If you want to remove the List-Unsubscribe header, specify it as a header to be removed. See [Utilities: List Settings: Sending to Your List: Header Rewrites](#).

Unlike other settings in Email Submitted Content, any changes you make to Add List Help Headers will also appear in mailings created through the ListManager web interface.

Note: If headers or footers are defined at multiple levels, i.e. server, site, or list, *each* header/footer will be added; one will not overwrite the other.

### **Rewrite Message ID Header**

This option informs ListManager to leave the Message-ID header alone and instead use X-Lyris-Message-Id for that purpose.

The Message-ID syntax is rewritten by ListManager to put the recipient email address in it, for easier human reading of permanent failures.

Some users object to ListManager rewriting the Message-ID to be unique for each member, so this option allows you to disable this feature.

Unlike other settings in Email Submitted Content, any changes you make to Rewrite Message ID Header will also appear in mailings created through the ListManager web interface.

### **Append to SMTP Header**

The message header is the part of the message that describes who the message is from, who it is addressed to, how the message should be displayed, and so forth. ListManager creates the correct header for your message automatically.

The optional text you specify will be appended to the end of the message header. A message header text has the form of Key: Value.

If you would like ListManager to include a Precedence: Bulk header, you must include it here.

If you want to add text to the header that is not a standard email header, you should prefix your key name with X- so that it does not interfere with normal operation of electronic mail. For example:

```
X-Legal: Contents Copyright 1997 Example Corp Ltd.
```

Unlike other settings in Email Submitted Content, any changes you make to Append to SMTP Header will also appear in mailings created through the ListManager web interface.

**NOTE** If headers or footers are defined at multiple levels, i.e. server, site, or list, *each* header/footer will be added; one will not overwrite the other.

## Utilities: List Settings: Email Submitted Content: Header Rewrites

---

### From:

If defined, replaces the From: in mailings distributed to the list when the mailing has been submitted via email. If blank, the From: is the email address and name of the author of the message. In some cases, you may want to obscure the email address of the author of the message and replace it with something else.

In some cases, you may want to obscure the email address of the administrator who created the mailing and replace that address with another. For instance, if several people in the sales department of your organization can contribute announcements, you may want the From: to say sales@your-company... rather than the email address of the actual author. Doing so protects the original author's identity and prevents list members from contacting the author directly.

You may also use the email address of the list, if you like.

Note: This field *must* be a valid email address. If you do not specify a valid email address for this field, you will likely have problems when you try to mail. Some sites will refuse your mail, while others will show strange information in the From: field on the messages they receive.

Examples of valid values for this field include:

```
bob@example.com
Bob Smith <bob@example.com>
bob@example.com (Bob Smith)
"Bob Smith" <bob@example.com>
"listname" <listname@yourlistmanagerserver.com>
```

The default when creating content or mailings is the email address of the administrator currently logged in. To change this default, modify Default To in [Utilities: List Settings: Web Created Content](#).

### Reply To:

If defined, replaces the Reply To: which the ListManager normally places in outgoing mailing list mail and replaces it with the contents of this field. If blank, the email address of the list is used. Enter "author" to use the email address of the message's author, or "nochange" to use the value of the header as received.

The default setting depends on the type of list you created when using [Utilities: Administration: Lists: New List](#) to create a new list. For discussion lists, Reply To: is blank. The email address of the list is used, so that recipients of mail from a mailing list can reply back to the mailing list.

For Email Marketing and Announcement lists, the Reply To: is set to "nochange" which uses the value as received. When using the administrator web interface to create a

message, there will be no Reply To: with this setting. If you would like to have a different Reply To: than the From:, specify it here.

If you are using email to send messages to an Email Marketing or Announcement list, it may be useful to change this address to an in-house email address, an [autoresponder](#), or to the unsubscribe mail merge tag %%email.unsub%% so recipients can unsubscribe easily if they try to respond to the message.

Examples of valid values for this field include:

```
bob@example.com
Bob Smith <bob@example.com>
bob@example.com (Bob Smith)
"Bob Smith" <bob@example.com>
author
nochange
```

If you enter an invalid email address in the Reply-To: field, some mail systems may either refuse your email address or rewrite the header in unexpected ways.

### To:

If specified, this address will be the To: message header on mail that is distributed to the mailing list. If blank, the email address of the list will be entered. Enter "nochange" to use the value of the To: header as received.

The default setting depends on the type of list you created when using [Utilities: Administration: Lists: New List](#) to create a new list.

For Email Marketing and Announcement lists, the To: is a mail merge tag which merges in the name and email address of the recipient.

For discussion lists, To: is blank, and ListManager sets the To: header to be: "List Description <list-email-address>" as in "Jazz Discussion List <jazz@clio.lyris.net>".

If you enter a value for this field which is not an email address, the mail received from ListManager may be rejected or the To: may be rewritten to something odd, depending on what the receiving email system is programmed to do with invalid email addresses.

Examples of valid values for this field include:

```
jazz@clio.lyris.net
Jazz Discussion List <jazz@clio.lyris.net>
jazz@clio.lyris.net (Jazz Discussion List)
"Jazz Discussion List" <jazz@clio.lyris.net>
%%nameemail%%
%%emailaddr%%
```

If you want to have the To: header be the email address of each recipient, you can use the mail merge feature to accomplish this. In the To: field, enter %%emailaddr%% for the email address only, or %%nameemail%% for both name and email address.

If you wanted to have a combination description/email address, you could make the **To:** field be: "Jazz Discussion List <%%emailaddr%%>"

### Remove Headers

This option allows you to explicitly remove any mail headers from mail being distributed to the mailing list. You can also remove headers that are inserted by ListManager.

If headers or footers are defined at multiple levels, i.e. server, site, or list, *each* header/footer will be added; one will not overwrite the other. Therefore, to remove headers or footers, you must remove them at each level in order to remove them completely.

If you want to remove multiple headers, you can as many as you like, by separating each header to remove with a carriage return. For example:

```
Precedence
Organization
Comments
X-Lyris-MessageID
```

It will search in a case-insensitive manner for the headers you specify. If any of the headers you specify to remove are found, they are automatically removed.

## Web Created Content

# Utilities: List Settings: Web Created Content

---

Utilities: List Settings: Web Created Content specifies default headers for content and mailings created through the ListManager administrator's web interface. These settings do not affect mailings sent to the list via email; see [Utilities: List Settings: Email Submitted Content](#) to configure these defaults.

You can also choose a default setting for the Track All URLs feature on this page.

### Default From

By default, the Default From: email address for web created content and mailings is set to "login", which uses the name and email address of the current administrator logged into the list, formatted as follows:

```
"Admin Name" <adminemail@example.com>
```

If blank, the From: address is left blank, and must be filled in every time content or a new mailing is created.

In some cases, you may want to obscure the email address of the administrator who created the mailing and replace that address with another. For instance, if several people in the sales department of your organization can contribute announcements, you may want the From: to say sales@your-company... rather than the email address of the actual author. Doing so protects the original author's identity and prevents list members from contacting the author directly.

You may also use the email address of the list in this field, if you like.

Note: This field *must* be a valid email address. If you do not specify a valid email address for this field, you will likely have problems when you try to mail. Some sites will

refuse your mail, while others will show strange information in the From: field on the messages they receive.

Examples of valid values for this field include:

```
bob@example.com
Bob Smith <bob@example.com>
bob@example.com (Bob Smith)
"Bob Smith" <bob@example.com>
"listname" <listname@yourlistmanagerserver.com
```

Note that by default there is no Reply To: header for web created content. If you would like to have a Reply To: header, specify it in [Utilities: List Settings: Email Submitted Content: Header Rewrites](#).

### Default To

If specified, this address will be the default To: message header for web created content or mailings. If blank, an email address or appropriate mail merge tag must be entered each time when creating content or a mailing.

Examples of valid values for this field include:

```
jazz@clio.lyris.net
Jazz Discussion List <jazz@clio.lyris.net>
jazz@clio.lyris.net (Jazz Discussion List)
"Jazz Discussion List" <jazz@clio.lyris.net>
%%nameemail%%
%%emailaddr%%
```

### Default Subject

If specified, this text will be the default Subject: message header for web created content or mailings. If blank, a subject must be entered each time when creating content or a mailing.

### Insert Headers and Footers

Specifies if [headers and footers](#) and other message wrapping should be added to web created content automatically. By default, ListManager does not add the email headers and footers to your content. However, you may specify that the headers and footers normally applied to email-submitted content also be automatically included as part of web created content.

The list level headers and footers are in [Utilities: List Settings: Email Submitted Content: Message Wrapping](#); the site level headers and footers are in [Utilities: Administration: Sites: New/Edit Site: Message Wrapping](#); and the server level headers and footers are in [Utilities: Administration: Server: Server Settings: Advanced: Message Wrapping](#).

The options are:

#### Never Insert Headers and Footers for Web Created Content

Headers and footers will not be added to web created content automatically; all unsubscribe and other information must be added manually to mailings.

#### Automatically Insert Headers and Footers

Headers and footers will be added automatically to every mailing sent. The headers and footers will not be visible or editable, but will be included when the message is sent.

#### **Insert Headers and Footers Into New Content and Mailings**

Headers and footers will be included in new content and mailings, but may be edited. The mailing content should be inserted between the preexisting headers and footers.

Note: If a content type will not be used (e.g., a plain-text message, without an HTML message body), the headers and footers should be deleted from the unused message body.

#### **Default with automatically tracking all URLs**

This is the default setting for the **Track All URLs** feature available for mailings. When set to **Yes**, URLs in the mailing are automatically made clickthrough tracking URLs. You can override this setting on a per-mailing basis.

## **Automatic Maintenance**

### **Utilities: List Settings: Automatic Maintenance**

---

These settings keep your server running smoothly by automatically removing bad email addresses. They also determine how long to keep inactive members and archives.

- Specify when [members should be held](#) (no longer delivered to) due to delivery problems.
- Specify how frequently to [purge inactive members](#) from the database.
- Specify [how long to keep message archives](#).

### **Utilities: List Settings: Automatic Maintenance: Error Mail**

---

ListManager by default handles all error mail, including bounces (transient and permanent failures). However, the error mail settings must be correct for your list in order for it to function properly.

By default, ListManager will try to send a message three times—one initial send, and two retries. If a mail server reports that an address is permanently non-deliverable, ListManager will only attempt to deliver to it once for that mailing. This kind of bounce is a permanent failure. A message that is undeliverable for other reasons (e.g., mailbox is full or mail server does not respond) is a transient failure. If an address is undeliverable for the initial send and all the retries, it is considered to have bounced once.

Even if a mail server initially accepts the message and later determines that the user does not exist, ListManager will be able to record that address as having bounced. In this situation, the receiving mail server will reply to ListManager with error mail. This error mail will go to the bounce email address and will contain the user's unique member ID number, so ListManager will be able to track it back to the particular address unable to accept mail. This kind of bounce will not appear in delivery reports, as the mailserver initially reported that it accepted the message. Many large ISPs (e.g., AOL) accept all mail and bounce back undeliverables later.

## **Hold Users**

This option determines whether members who bounce a great deal of mail have their membership automatically "held" by ListManager so it does not continue to send mail to them.

By default, this setting is set to Yes. It is recommended that you retain this setting so ListManager holds users who bounce email.

When people's email addresses go bad (for instance, they change to another Internet Service Provider), each email message sent to their old address bounces back to ListManager. By default, ListManager will analyze the failures and determine who is causing them. If a member's email address appears to be invalid for several days in a row (based on your Bounce limit setting, see below), ListManager automatically disables their membership so that ListManager no longer sends them mail.

In most situations, automatic holding of users is a desired feature. In some situations, such as with internal mailing lists, where email address problems can be temporary (or must be repaired by a email system administrator) you can disable this feature. ListManager will then never put a membership on "hold".

When a user is placed on hold, ListManager can send the user an email message indicating that this has occurred as well as a copy of the most recent error message ListManager received from this user. This notification message, if the user receives it, can be very helpful to the user in determining why their email was being rejected by their mail system, and allows them to "unhold" their membership.

## **Bounce Limit**

Determines the number of consecutive failed deliveries an address may have before being set to "held" status. Note that these failed deliveries may be days, weeks, or months apart, so long as they are consecutive (i.e., no successful deliveries between them). A successful delivery "resets" the count for an address, so addresses with intermittent delivery problems are not removed.

The default setting is two (2) bounces for announcement and email marketing lists, and five (5) bounces for discussion lists. If set to one (1), addresses that bounce will be put on hold after only one permanent delivery failure.

When analyzing the failed deliveries, ListManager counts only one bounce per day, per member, so an email address does not typically go on hold due to delivery problems on a single day.

The lower the number, the more quickly bad email addresses will be set to held—and the greater chance that someone with transient server problems will be inadvertently



held. If you want your members to be placed on hold if they bounce any messages at all, you can set this number to 1. Setting Bounce Limit to 1 is strongly recommended if you are using old data with many bad email addresses.

We recommend the following settings:

<b>Frequency</b>	<b>Bounce Limit</b>
Daily	5
Biweekly	3
Weekly	3
Bimonthly	2
Monthly	2

Note that failed send attempts are recorded in the `lyrCompletedRecips` table: a total of the number of bounces for an address is no longer contained in the `members_` table.

### **Redirect All Bounces to Email Address**

If blank, ListManager handles all bounced mail for you. If you don't want ListManager to handle your bounce mail, specify an email address to where all error mail should go.

This option is provided for advanced users, and it should be left blank unless you are prepared to handle the bounce mail at another address.

Any email address you specify here will replace the Mail From: header in your outgoing mail message. Normally, the mail transaction Mail From: address is the error handler of the server, and error mail is defined by Internet standards as going to this address.

If you change this setting ListManager will no longer receive error mail and will no longer be able to automatically process bounces, error messages, bad deliveries, etc.

It is **STRONGLY** recommended that you do not modify this setting.

### **Notifying Users of Their Held Status**

When a member bounces too much email, their status can be changed to "held". That means their email address has been declared as "invalid" or "inoperational" and they no longer receive list postings.

ListManager has the capability to send a notification message to people on hold, to tell them about their status and give them the option of un-holding themselves. A member can unhold themselves by sending email to "unhold@..." at your ListManager hostname (e.g., unhold@lists.example.com).

If you choose to "never notify" the member will receive no notification, ever. Thus, they will not have a real opportunity to "unhold" their membership.

Although it is possible to inform users that their membership is on hold because of bounces, it is not recommended; since the address is bouncing mail, a hold notification would likely bounce as well. Notifying users of their held status can greatly slow down the performance of your ListManager server.

### **Notify How Often**

This setting determines the frequency at which ListManager notifies held members. You can choose to never notify held members, notify them every night, every few days or whatever interval you choose. This setting should be a number lower than that used for Notify for How Many Days, or members will never receive a held notification.

By default, your list is set to not notify held members.

### **Notify for How Many Days**

This setting determines for how many days a member who has been placed on hold should receive a notification message. This setting does not directly correlate with how many notifications the member will get; it only means that the member will receive notifications for a specific duration.

By default, your list is set to never notify held members.

Thus, you can determine how many notifications someone will get if you divide the Notify for How Many Days value by the Notify How Often value, and drop the remainder. For example, if your "Held Notify Days" is set to 11 and your "Held Notify Interval" is set to two, you would divide 11 by two, and drop the remainder. These settings result in five notifications.

## **Utilities: List Settings: Automatic Maintenance: Purging Inactive Members**

---

These settings determine how frequently inactive members are purged from your database. By default, they are never purged. If you would like to conserve space in your database, you may change these settings.

### **Purge Held**

This setting determines how long someone who has had their membership placed on "hold" should remain until they are permanently erased from the system.

### **Purge Unconfirmed**

This setting determines how long someone who has asked to subscribe to the mailing list, but never "confirmed" their membership should remain in the system until they are permanently erased from the system.

This setting only applies if the mailing list is set to require confirmation from new members. See [Utilities: List Settings: New Subscriber Policy: Confirmation](#).

**NOTE** If ListManager is unable to deliver a confirmation email message due to a permanent delivery problem (receiving mail server gives a 500 error), the member will be immediately deleted.

### **Purge Unapproved**

This setting determines how long someone who has applied for membership but not been approved by an administrator should remain until they are permanently erased from the system.

This setting only applies if the mailing list has its security set to "private", so that new memberships require administrator approval. See [Utilities: List Settings: New Subscriber Policy: Security](#).

### **Purge Expired**

This setting determines how long someone who has had their membership expire should remain until they are permanently erased from the system.

This setting only applies if an expiration date is set on memberships, so that memberships expire after a certain number of days. Otherwise, memberships never expire.

### **Purge Unsubscribed**

This setting determines how long an unsubscribed member should remain in the database before they are permanently deleted. Keeping unsubscribed members allows you to get accurate reports of your membership.

### **Remove Old Referred Members**

This setting determines how long referred members are saved before being purged. Referred members are those that have been invited to join your list using the referral tracking feature, but who have not joined the list. Removing referred members does not prevent them from joining the list later; however, it is likely that referred members will be less likely to act on an invitation days or weeks after receiving it. This information should be kept as long as necessary for reporting purposes.

## **Utilities: List Settings: Automatic Maintenance: Purging Archives**

---

### **Keep Archived Messages for How Many Days**

This setting determines how long archived messages will be saved. Saving a message in the archives allows it to be read at a later date.

By default, your list is set to 0 (zero), or to keep archives indefinitely. If you set the list to not keep archives, no archives will ever be saved. This is the opposite of setting the list to 0 (zero).

Not saving archives conserves disk space.

Note: If you disable archive saving completely, users will no longer be able to receive digest versions of the mailing list, and duplicate messages will not be removed.

If you want your users to be able to receive digests, but do not want to keep archives, set the Archive Messages to Enable Merge Mailings setting to "Yes," and set Keep Archived Messages for How Many Days to "1". See [Utilities: List Settings: Basic Information: Enable Features](#) to save archives.

### **Keep How Many Messages Archived**

This setting determines how many messages from the list will be saved in the archives. For example, a setting of 10 means that the previous 10 messages will be saved in the archives. Any old messages beyond the most recent 10 messages would be automatically removed.

By default, your list is set to 0 (zero), or to keep archives indefinitely. If you set the list to not keep archives, no archives will ever be saved. This is the opposite of setting the list to 0 (zero).

### **Keep Mailing and Clickthrough Data for How Many Days**

This setting determines how long outgoing mail to your list is saved. Delivery and clickthrough data is only available for saved mailings. Increase this setting if you will need to refer to this data in the future.

Note that performance may decline if you keep mailing and clickthrough data for a very long time for many of your lists.

## **Discussion Forum Interface**

# **Utilities: List Settings: Discussion Forum Interface**

---

These settings determine how members interact with the ListManager discussion forum interface, and what kind of information they can get about your list.

- Specify [message reading](#) settings: who can see the list's messages, and what methods they may use.
- Specify [new subscriber requirements](#) if subscribing through the ListManager discussion forum interface.
- Provide [information about your list](#) in the ListManager discussion forum interface.
- Specify who may participate in [conferences](#).

# **Utilities: List Settings: Discussion Forum Interface: Message Reading**

---

## **List Visibility**

Defines whether or not this list is accessible in the ListManager discussion forum interface. The options are:

### **List is Visible (default)**

The list is visible in the discussion forum interface if a user clicks "All Forums".

### **List is Hidden but Accessible if the List Name is Known**

The list is invisible in the discussion forum interface if a user clicks "All Forums", but may be accessed directly via URL. Example:

```
http://lists.example.com/read/?forum=hidden
```

### **List is Inaccessible**

The list is not accessible in the discussion forum interface by users.

A hidden or inaccessible mailing list does not appear in the discussion forum interface menus and does not appear in the "lists" email command.

### **Allow Visitors to Read Archives**

Defines whether to allow visitors to visit your mailing list and read your archives. Allowing visitors means that the discussion forum interface will allow non-members to read and search the past mailings on your list. They will also be able to get information about your mailing list. A visitor cannot contribute to a mailing list, and cannot receive mailing list contributions via email. By default, this feature is set to "No."

Allowing visitors is often a good way for prospective members to get a taste of what a mailing list is about. They will be able to read past postings to see if the mailing list interests them. If it does, they can apply for membership.

Allowing visitors is also useful for specialized mailing lists, where the information is not confidential, but you do not want just anyone joining. For example, a mailing list discussing Internal Telecommunications standards would want outsiders to be able to read the discussion but, you may want the mailing list to be *Private*, so that only members of the standards committee can belong to the group. See [Utilities: List Settings: New Subscriber Policy: Security](#) for more information on making a private list.

### **Enable Archive Searching**

This option determines whether archived messages are full text indexed and thus text-searchable. By default, this feature is set to Yes.

If you do fully allow text indexing of the archives, members are able to perform very fast word searches of the archives of your mailing list. However, the full text index does consume a great deal of space and may not be applicable to all mailing lists.

If enabled, ListManager removes all the punctuation and numbers, and creates an index based on the remaining individual words. Numbers are not indexed.

A word is anything over 3 characters and up to 30 characters.

ListManager does not index HTML code or attachments. If a message is received in multipart, only the text is indexed. If a message is received with only HTML, the HTML is converted to text and then indexed.

Indexing does not slow down other ListManager processes because it has the lowest priority. Anything else ListManager needs to do, like sending messages, gets done first, interrupting the message indexing. When the ListManager server is completely idle and has nothing else to do, the indexing resumes.

### **Make Available as a Newsgroup?**

This setting determines whether this mailing list will be available as a newsgroup. By default this setting is set to No.

ListManager is capable of feeding your mailing list as a secure, private newsgroup.

If your users have Netscape or Internet Explorer 4 (or newer) they can access the newsgroup with the URL `news://server-name/listname`. Alternatively, they can get a list of mailing lists and choose the lists they want to use by going to `news://server-name`. The "server-name" is the Internet machine name of the machine running ListManager, typically the same machine name users receive email from.

If your users do not have Netscape or Internet Explorer 4 (or newer) they can access your group by defining your ListManager as their default Newsgroup server. For example, Forte "Agent" and Internet Explorer 3 use this method.

Note: ListManager implements all the same security for newsgroups as apply to mailing lists. Thus, if your list is set to "allow visitors", then non-members will be able to read your newsgroup without joining. If your list is set to not allow visitors, only members will be allowed to read.

If a user is using Netscape and they try to access a group which does not allow visitors, Netscape will automatically prompt the user for their name (which is their email address) and their password (if they have one). ListManager will then determine if they are a valid user and if they are allowed to read the group. If they are not, they will not get any further access to the group. If they are, ListManager will determine for which groups this name/password combination is valid and allow them access to these groups. If they try to access a group they are not authenticated for, Netscape will again prompt them for a name and password.

Most news browsers do not ask for a name or password as needed, but rather ask for this information as part of the static configuration of the news browser. Agent and Internet Explorer work this way. If they are using one of these browsers, they will need to enter their email address as their newsgroup name and their list password into their news browser, which will allow them access.

One problem with these browsers is that if the user has different passwords on different lists, ListManager will only let the user into the lists for which their name/password combination is valid. Netscape is the only browser we know of which will ask for name/passwords as needed. We recommend that most users use Netscape for accessing ListManager newsgroups, as this is currently the only Newsgroup browser that supports the latest security, multi-server and full text searching features in the NNTP protocol.

ListManager also allows posting via a news browser. Postings via news browsers are treated exactly as if they came in via email. They are subject to all the same moderation, membership and security requirements that normal email is subject to. If a posting via a news browser is rejected, the poster will receive notification of this via an email message.

ListManager also supports Newsgroup full text searching. At current time, only Netscape supports this feature. To use it, right-click on the newsgroup name, and choose "search". You will be able to build a complex boolean search with multiple terms and NOT terms as well. ListManager will execute your search extremely quickly, thanks to its full text index.

**NOTE** ListManager includes a demonstration version of the newsgroups support. Long messages will be truncated and each message viewed through the Newsgroups interface will have a disclaimer footer appended to it. If you decide that you want to have the full ListManager newsgroups support, you can upgrade to include this feature. Contact your sales representative at sales@lyris.com for more information.

## **Utilities: List Settings: Discussion Forum Interface: New Subscriber Requirements**

---

### **Restrict Member Options**

This setting determines whether your members are allowed to set various membership options, such as whether or not they'd like to receive the messages in digest form.

By default, lists created as email marketing or announcement lists are set to be restricted, and discussion lists are not.

On an email marketing or announcement list, these member options often do not apply. For instance, if you are sending out one announcement per week, it does not make sense for members to be able to set their membership to receive a daily digest.

In such a case, you may want to disable the member's ability to set their own options. The options will no longer appear in the ListManager discussion forum interface for joining and "your settings", and email commands to set them will be rejected.

### **Ask Subscribers for Name**

When a member joins using the ListManager discussion forum interface, ListManager can ask the person for their name. This option allows you to require a name, to make the name optional, or to not ask for their name at all. By default, this setting is set to "Ask for name when joining, but make it optional".

Note: If joining by email is allowed, this setting has no impact, because there is no way to require a name if people can join by email. If you want to always have member names, you should also set your mailing list to not allow joining by email, so that people must use the ListManager web interface to join. See [Utilities: List Settings: New Subscriber Policy: Security](#).

Note that if the name field is blank on a web subscription, but reply to a confirmation message, ListManager will automatically use the name in the From: field (if available), or from an email posting to the list. This will not overwrite any preexisting names.

### **Require Password**

When a member joins using the ListManager discussion forum interface, ListManager can ask the person to pick a personal password. A personal password is useful for mailing lists where security is important. If no password is defined for a user, then other people can enter the discussion forum interface as that person by typing in their email address. Requiring each user to have a personal password adds considerable security to your mailing list.

This option allows you to require a password, to make the password optional or to not ask for a password at all.

By default, this option is set to "Do not ask for password at all".

If you allow joining by email and you set Require Password to "yes", ListManager will generate a random numeric password for members who subscribe by email and send it.

## Information About Your List

# Utilities: List Settings: Discussion Forum Interface: Information About Your List: General

---

### Topic

Defines the topic for this mailing list.

### Allow Info

Defines whether non-members should be able to view general information about this mailing list, such as who the administrator is, what the description is, etc.

### Global

Defines whether the existence of this list should be known to the outside world. Setting Global to Yes means that when and if Lyris creates a global directory of mailing lists, your list will be included in that directory.

# Utilities: List Settings: Discussion Forum Interface: Information About Your List: About this List

---

### Long List Description

Reference to a document that describes this mailing list. This description will be displayed in the discussion forum interface's [About](#) tab. You may select from any document you create. See [Utilities: Automated Messages: Document Content](#) for more information about automated message documents.

### Comments On This List

Reference to a document with comments about this mailing list. These comments will be displayed in the discussion forum interface's [About](#) tab.

### Keywords To Describe This List

Words that describe this mailing list. If several words are specified, separate each one with a comma. These words will be displayed in the discussion forum interface's [About](#) tab.



### **URL to GIF/JPEG List Logo**

The URL to a web-ready graphic to be displayed in the discussion forum interface for this mailing list. Since this interface uses white as a background color for all the web pages, it is a good idea to make your graphic look good on a white background. This URL can be a local path (off of your web server's document root), such as /graphics/jazzdisc.gif or a full URL, as in <http://www.company.com/graphics/jazzdisc.gif>.

If you specify a full URL, the graphic does not need to reside on the same web server as the ListManager discussion forum interface. This is convenient, because it means that you can update the logo graphic without having access to the hard drive on the machine running ListManager.

This logo will be displayed in the discussion forum interface's [About](#)tab.

## **Utilities: List Settings: Discussion Forum Interface: Information About Your List: Contact Info**

---

### **List Contact**

Reference to a person who is the administrative contact for this mailing list. Choosing a person as a list contact of a mailing list does not give the person any security privileges; it is for informational purposes only. This information will be displayed in the discussion forum interface's [About](#)tab.

### **List Sponsor**

Reference to a document describing the organization sponsoring this mailing list. See [Utilities: List Documents](#) for more information about documents. This information will be displayed in the discussion forum interface's [About](#)tab.

### **List URL**

A URL to a Web site for this mailing list. For example, if a Web site called Jazz discussion homepage exists, you might enter the URL: <http://www.jazz-discuss.com/>. This information will be displayed in the discussion forum interface's [About](#)tab.

## **Utilities: List Settings: Discussion Forum Interface: Information About Your List: Language**

---

The Language settings are informational only, and do not affect how your mailings are sent.

### **Language #1**

The primary language used in messages on this mailing list.

## Language #2

The secondary language used in messages on this mailing list (Can be the same choice as the primary language).

# Utilities: List Settings: Discussion Forum Interface: Conference

---

These settings determine how members may access the conference feature of the discussion forum interface. The conference feature allows users to chat with one another using the ListManager discussion forum interface in real time, and optionally send the discussion to the list.

## Accessibility

Determines whether or not the conference feature is available.

By default, everyone may read messages posted to a list's conference, including [visitors](#) (non-members) if your list is set to allow them. If Allow Visitors to Read Archives is set to No (in [Utilities: List Settings: Discussion Forum Interface: Message Reading](#)), only list members will be able to access the list's conference.

To limit access to list members, change this setting to Members Only. If visitors have been enabled, they will still be able to access your list's archives in the discussion forum interface.

To disable all access to this list's conference, select Disable Conference.

## Posting

Determines who is allowed to post to the conference, if it has been made available by the Accessibility setting.

By default, everyone may post messages to a list's conference, including [visitors](#) (non-members) if your list is set to allow them. If Allow Visitors to Read Archives is set to No (in [Utilities: List Settings: Discussion Forum Interface: Message Reading](#)), only list members will be able to post to the list's conference.,

To limit posting to list members, change this setting to Members Only. To limit posting to list administrators, select Admins Only.

## Save Posts For

Determines how long posts to the conference are saved. Note that all conference posts will be lost if ListManager must be restarted.

By default, posts are saved for one day. You may change how long posts are saved (from one hour to 14 days) here.

## Guest Message

The message visitors see when they attempt to enter a conference without having logged in first. This message is provided here for your information only, and cannot be modified. It reads:

Note: If you are a member, please log in before using the conference. If you are not a member, please create a temporary guest user by entering a name and password.

## Discussion Group Features

# Utilities: List Settings: Discussion Group Features

---

These features are generally used only for discussion groups—lists where list members respond back and forth to each other's messages.

- Specify how the [message looks](#): whether or not to prepend the list's name to the Subject: line, or whether postings can be anonymous
- Specify [message wrapping for digests](#).
- Specify posting [security](#): who can write to the list, and who can see the list of members.
- Specify automatic reasons to [reject messages](#).

# Utilities: List Settings: Discussion Group Features: Message Look

---

## List Subject

Defines whether the name of this mailing list should be prepended to the Subject: line of mailing list mail. This feature helps list members identify email as coming from your mailing list, and may help their email program filter and organize email better.

For example, if the original subject is:

Subject: new album from Betsy Smith

The new subject is:

Subject: [jazz-discuss] new album from Betsy Smith

By default, the subject line is untouched.

## Make Postings Anonymous

Some kinds of mailing lists benefit from allowing people to be anonymous when they post. For example, an employee suggestion discussion might need to be anonymous, as might a psychological support group.

ListManager supports anonymous mailing lists by removing all identifying marks from the headers of the messages distributed to the mailing list. The From: defaults to "Anonymous" and can be set to something else if desired.

If a list is moderated, the moderator will see the real author of the message before approving it, and it will "anonymize" when distributed.

Of course, this feature cannot read the message so, if the message contents contain something that identifies the person, ListManager cannot do anything about that. Thus, people should remember to not include their personal mail footers when posting to an anonymous mailing list.

### **Prepend to Beginning of Every Digest**

If specified, appends this text to the beginning of every nightly digest and index message from this list.

### **Append to End of Every Digest**

If specified, appends this text to the end of every nightly digest and index message from this list.

By default, when you create a mailing list, this footer is added:

```
---  
You are currently subscribed to %%list.name%% as: %%emailaddr%%.  
To unsubscribe click here: %%url.unsub%%  
or send a blank email to %%email.unsub%%
```

This footer uses the mail merge fields to allow failsafe unsubscribing.

Of course, you can change this footer to be anything you like, or remove it completely.

## **Utilities: List Settings: Discussion Group Features: Security**

---

### **Reject Posts From Non-members**

This setting indicates that people who are not members of this mailing list will be allowed to post.

The default setting is "Yes," which means that if someone tries to contribute a message to this mailing list and their name or email address is not listed as a member of the list, their message will automatically be rejected.

A setting of "No" means that the person's contribution will not be rejected. However, if the list is moderated in some way (either full or number moderation) their message will require moderator approval. For example, if your list is set to number moderate, so that new members need their first message approved, any message coming from a non-

member will be treated as if a new member posted it and will require moderator approval.

Allowing non-members to post and not having moderation means that anyone can send email to your list address, and it will be distributed to your members.

### **Security of Member List**

By default, the listing of members of a mailing list is considered confidential and is only available to the list administrator. This option also allows you to make the listing of members available to members of the mailing list or to anyone. The ["review"](#) email command is used to obtain a member listing by email.

**Utilities: List Settings: Discussion Group Features: Message Rejection Rules**

## **Utilities: List Settings: Discussion Group Features: Message Rejection Rules: Blanks**

---

### **Allow Blank Subject**

Allow messages to be posted which have a blank subject.

By default, ListManager will not allow messages which have a blank subject to be posted to a mailing list.

Related to this, some email programs place a carriage return in the Subject, which is highly non-standard and causes ListManager to sometimes think the subject is blank. ListManager removes the carriage return in the Subject line to make the message conform better with standards.

### **Allow Blank Body**

Allow messages to be posted which have a blank body.

By default, ListManager will not allow messages with a blank body to be posted to the mailing list. However, allowing blank bodies can be useful if you use your list to post flash messages, where the only text is in the subject.

**NOTE** You can choose **yes** for both **Allow blank subject** and **Allow blank body**. However, if one of these (subject or body) is blank, the other cannot be. If you attempt to send a message where both are blank, you will receive an error message.

## **Utilities: List Settings: Discussion Group Features: Message Rejection Rules: Same Message Rules**

---

**NOTE** Identical messages sent to multiple segments or lists by the administrator through the administrative web interface are always allowed. However, members will only receive one copy of the message if Cross-Postings and Duplicates is set to "Make Sure That Multiple Copies of Cross-postings Are Removed."

### **Allow Duplicate Postings**

A duplicate posting occurs when one person attempts to post a seemingly identical message to the same mailing list or segment more than once in one day.

ListManager looks at the entire message body to determine if a posting appears to be a duplicate.

Note that if duplicate postings are sent in multipart-alternative format, the content of the message may be the same but the boundaries may differ, causing a seemingly duplicate posting to be sent.

Normally, duplicate postings are the result of the author not being careful and sending the same message twice, or of some Internet mail error where the same message is delivered twice.

By default, ListManager rejects duplicate postings to all lists and segments via email.

**NOTE** This setting only applies to messages received via email or posted through the discussion forum interface. Duplicate postings by an administrator through the web interface are always allowed.

Normally you will want to leave this default setting as it is since there usually is no good reason why your list members would want to receive the same message twice. Also, this feature is quite effective as a mail-loop prevention technique, when people attach a misbehaving "automatic email answering" program to their email address.

### **Allow Cross-Posting?**

This setting determines if messages that are cross-posted are rejected by ListManager or if they are allowed onto the list.

A cross-posted message is a single message sent to more than one mailing list or segment on a server. For example, in the To: field of an email message, the author can list several mailing lists and thus deliver the same message to several lists.

**NOTE** Messages will be compared with others posted to the list in the past 24 hours. Older postings will not be considered.

By default, email marketing and announcement will allow cross-posting, but discussion lists will not. If Allow Cross-posting? is set to No, ListManager will catch a cross-posted message, see that it has already been posted to another list and reject any further attempts to post the identical message. If the message is modified slightly in some way (i.e., an extra space, a carriage return, an extra sentence, etc.) it will not be considered a cross-posting. Note that [Archives](#) must be kept for at least one day for cross-posted messages to be removed.

In general, cross-posting to mailing lists is considered bad Internet etiquette and, occasionally, it is a method used by spammers to disseminate inappropriate email. However, there are many circumstances where it is appropriate. For instance, if there

are two mailing lists or segments that deal with related topics, and messages appropriate to both groups are written, the author may want the message to be distributed to both mailing lists.

**NOTE** This setting only applies to messages received via email or posted through the discussion forum interface. Cross-posting is always allowed by the administrator through the administrative web interface.

### **Cross-Postings and Duplicates**

If cross-posting is allowed, this setting determines what members of multiple lists or subsets will receive. Note that [Archives](#) must be kept for at least one day for cross-posted duplicates to be removed.

By default, members will not receive duplicate cross-posted messages.

For example, if a message is posted to two lists or segments and one person (one email address) is a member of both those lists or segments, the person will receive one copy of the posting, because the setting is "Make Sure that Multiple Copies of Cross-Postings are Removed."

However, there may be situations where you would like people to receive copies as posted to the lists or segments. If that is the case, change this setting to "Cross-Posted Copies Should be Sent to Recipients as Listed."

An example will help clarify how this feature works. Say you have several announcement lists where you post articles about various topics. You have lists named "computers", "cooking", "gardening" and "sports". People join the various lists that they are interested in. Some people join just one list, while others might join several lists.

Now, say that you have an announcement about a "video game for playing soccer" and you feel that it is appropriate for both the "computers" list and the "sports" list.

If you post your message to both "sports" and "computers" (i.e., you are "cross-posting" your announcement) people who are members of these two groups will receive your announcement.

If you are set to "Cross-Posted Copies Should be Sent to Recipients as Listed", then someone who is a member of both "sports" and "computers" will receive two copies of your message, one from each mailing list.

If you are set to "Make Sure That Multiple Copies of Cross-postings Are Removed", then someone who is a member of both "sports" and "computers" will only receive one copy of your message. They will receive the message from the first group you sent the message to. Thus, if you posted your message To: "soccer, computers" then the "soccer" messages are distributed first and that is where the person will get their message from.

This feature is particularly useful with announcement lists where you want to split your lists into various topics, but you have messages that apply to several topics. With other list managers, people would receive multiple copies. With ListManager, the duplicate messages are removed and people receive only one copy.

This feature works the same way when sending to multiple segments. For example, let's say you'd like to make an announcement to all administrators on your server.

When selecting recipients for a mailing, you may select the administrators segment for each list. If your lists are set to "Make Sure That Multiple Copies of Cross-postings Are Removed", your administrators will receive only one announcement, regardless of how many lists they are members of.

## **Utilities: List Settings: Discussion Group Features: Message Rejection Rules: Etiquette**

---

### **Max Quoting Allowed**

This option limits the number of continuously quoted lines in a message. The default, 0, allows unlimited quoting. Quoted lines are identified as beginning with the > character. Messages over these limits are rejected, with an explanatory message.

Note: This applies to continuous quoted lines, not to the total amount of quoted lines in the message. Messages that use a different quoting character (such as :) will not be rejected if they exceed the Max Quoting Allowed.

### **Daily Message Limit**

Defines the total number of messages that can be distributed to the mailing list in one day.

This feature is generally used as a last resort to prevent mail loops from going out of control. A mail loop occurs when mail sent to the mailing list members encounters a badly configured email server, and the email server sends a message back to the mailing list.

ListManager has many features to prevent mail loops from happening, so the Daily Message Limit will, in practice, never become an issue. However, if, for some reason, a message loop were to occur, the Daily Message Limit would shut off the mail loop after a certain limit.

Note: ListManager automatically blocks duplicate posts for discussion lists, and unless this feature is explicitly disabled, it is very effective at stopping mail loops before they occur.

### **Message Size Limit**

Defines the maximum size of messages that may be contributed to the mailing lists. Any contributed message over this size will be automatically rejected.

Sometimes mailing list members will try to send a large attachment to a mailing list (such as a sound file), and most mailing list members do not want to receive this size of a file from the mailing list. This feature will block excessively large messages from being sent.

List administrators are not restricted by this message size limit—their messages can be of any size.

### **Max Posts Per Member**



This setting places a limit on the number of posts that a single member is allowed to send to this mailing list in a one-day period. If the member goes over this limit, they will be rejected and notified that they need to wait until the next day. By default, this setting is "0", meaning unlimited posts.

This feature is useful if someone is dominating the list, or is clogging it up with "me, too" responses.

## For Programmers

# Utilities: List Settings: For Programmers

---

These settings allow programmers additional control over what messages should look like.

- Specify who is allowed to include [scripting](#) in messages, including mail merge and conditional text.

- Specify programming [extensions](#) to be run before and after messages.

# Utilities: List Settings: For Programmers: Email Scripting

---

## Enable Scripting

This setting determines how merging and scripts are handled in the body of the message. The settings are:

### Administrators Only

When this is set, only administrators are allowed to use scripts or mail merge tags delimited by %% symbols. For anybody else, they will pass through and not be interpreted.

### Any Member

When this is set, any member of a list can post scripts or mail merge tags delimited by %% symbols. If the list is set to allow non-members to post, then they will have the same capabilities as a member in this regard.

### Disable

Nobody can post scripts or mail merge tags delimited by %% symbols. Scripts or tags in list headers or footers will still be evaluated.

Note that there is also a server wide [Scripting Feature Level](#) which regulates what kinds of scripting and mail merge are available here, unless the level has been set higher for this particular list by the server administrator in the Server scripting limit override setting, available on this tab.

For example, if Scripting Level is set to No Scripting/Merge, administrators would not be able to do full scripting, even if this setting was Administrators Only unless the server administrator enabled full scripting for this particular list.

## Scripting Level

This setting determines what level of scripting will be available for the selected list.

The options are:

### No Advanced Scripting

Disables all advanced scripting. Merging based on the standard ListManager tables is allowed; user-defined fields are not. This is the default setting for discussion lists.

### Safe Scripting/Merge

Allows only 'safe' advanced scripting. File system, SQL and other potentially harmful access is not allowed. Safe scripting is always permitted for "hello" messages so that tags that notify users about the need for a password (i.e., %%url.resetpassword\_mri%% and %%url.resetpassword%%) function properly.

### Full Scripting/Merge

Allows the complete Tcl Interpreter, including file system, SQL, and other access. Important: if you allow full scripting/merge, we recommend that the list be configured to moderate all incoming messages. Otherwise, certain Tcl procedures such as "redirect" could be misused. See [ListManager Tcl Procedures](#) for more information about the "redirect" command. This is the default for announcement and email marketing lists.

Safe and Full Scripting/Merge are only available if you are running ListManager Pro or Enterprise.

The level of scripting you select should be determined by the type of list you're using, and who is likely to post to it. For example, discussion lists are unlikely to need the advanced scripting features, so scripting should be disabled with this setting (the default for these lists). Even the 'safe' level would likely be unnecessary for this type of list. Note that the server [Scripting Feature Level](#) overrides the list level if the setting here is more restrictive than the setting for the list.

## Server scripting limit override

Allows the server administrator to override the server scripting feature level on a list by list basis. This setting is only visible to server administrators. By default, it is set to *Don't override config server setting*. The server administrator may change the setting per list to *No Advanced Scripting*, *Safe Scripting/Merge* or *Full Scripting/Merge*.

## Initialization Script

If specified, the script that will be called when a Tcl interpreter is created for a mailing.

These scripts are useful for setting up proxy settings for httpget or setting global variables.

These scripts are called in the order Server, Site, and List when a Tcl interpreter is created for a mailing. If no interpreter is required for the mailing, these scripts will not be run.

If your message requires these scripts to be run and you are not using TclMerge in your message (i.e., no Tcl scripting is used in your message), you may add the following to your message to cause the interpreter to be instantiated.

```
%%init ; return "%%
```

To set a proxy server, the following lines may be added:

```
package require http 2.3  
http::config -proxyhost yourproxyhostname -proxyport  
yourproxyportnumber
```

## Utilities: List Settings: For Programmers: Extensions to Run

---

### Before Posting

This setting allows you extend the ListManager posting processing with your own program. When a message comes in for distribution on this mailing list, your program will first be run and your program can do any processing it wishes on the message. If your program wants to stop processing of the message or stop the message from being posted, it can delete it.

### After Posting

This setting allows you extend the list posting processing with your own program. When a message comes in for distribution on this mailing list, your program will run at the very end after the message has been distributed.

### Before Subscribing

This setting allows you to extend the subscribe process by running your own program before the subscription is accepted by the server. Whenever a subscribe request comes into this list, this program will be run. For example, your program may have a database of acceptable users and you may want to look up each subscribe request to make sure they are in the database.

### After Subscribing

This setting allows you to extend the subscribe process by running your own program after a subscribe request has been processed by the server. For example, your script may want to update your external database, so it can keep your ListManager db and your external db in sync.

### Before Unsubscribing

This setting allows you to extend the unsubscribe process by running your own program before an unsubscribe request has been processed by the server.

### After Unsubscribing

This setting allows you to extend the unsubscribe process by running your own program after an unsubscribe request has been processed by the server. For example, your

script may then update your external database so that your ListManager db and your external db are in sync.

## Utilities: Other: SOAP API

---

The SOAP API in ListManager works by fetching URLs in the ListManager web interface from within your program.

For example, if you use your web browser to go to <http://localhost/utilities/other/api/test> and click "submit" you will see the phrase "Test succeeded!".

Instead of using a web browser, you will want to use small programming scripts to fetch URLs that do actions you desire.

### Examples in various programming languages

Below is source code for fetching the test URL in the ListManager web interface. These examples show how easy it is to have ListManager perform an action for you.

#### *Linux Command Line*

```
curl -u admin:lyris http://localhost/utilities/other/api/test do
or
GET
http://admin:listmanager@localhost/utilities/other/api/test_do
```

#### *Microsoft ASP*

```
<% Response.Buffer = True
Dim objXMLHTTP, xml
Set xml = Server.CreateObject("Microsoft.XMLHTTP")
xml.Open "GET",
"http://admin:listmanager@localhost/utilities/other/api/test do"
,
False
xml.Send "
Response.Write xml.responseText
Set xml = Nothing %>
```

#### *PHP*

```
<?php
function urlget ($url) {
    $f page = @fopen ($url, "r");
    if ($f page) {
        $page contents = fread ($f page, 10240);
        fclose ($f page);
        return ($page contents);
    };
    return "";
};
print
urlget ("http://admin:listmanager@localhost/utilities/other/api/t
est do");
?>
```

### Python

```
import urllib
f =
urllib.urlopen("http://admin:listmanager@localhost/utilities/other/api/test_do")
print f.read()
```

## How to find API functions

In order to make it easy for you to find and understand every Programming API function in ListManager, we have organized all the functions into menus, and each function has a very simple HTML form demonstrating what kind of information the function needs, and how that function works.

## Passing Parameters

API functions can all be passed parameters in the URL, with the standard GET format (ie, setting=value on the URL) or alternatively, for larger amounts of data, all functions accept their parameters through the HTTP-POST standard (ie, as form POST variables).

## Return Values

Most Programming API functions return just one value. In those cases the value is returned as raw text, as the HTML results of the URL.

If an error occurs and the API function cannot work, a text message is returned in this format:

```
<ERROR>sorry, an error occurred</ERROR>
```

Some API functions need to return a list of value, such as the function for "On what lists is a given email address?". In those cases a list of items is returned in this format:

```
<ITEM>first list item</ITEM>
<ITEM>second list item</ITEM>
<ITEM>third list item</ITEM>
```

If an API function needs to return a key/value array, such as the function for "Get all attributes of a member", then the results are returned in this format:

```
<KEY>first key</KEY><VALUE>first value</VALUE>
<KEY>second key</KEY><VALUE>second value</VALUE>
<KEY>third key</KEY><VALUE>third value</VALUE>
```

## Security

The same security which the web interface enforces applies to the programming API as well. Thus, as a list administrator, you are allowed to access to all the member functions that you normally have access to in the GUI. If you try to work on a member from a list you don't have access to, an error will occur. Some API sections, such as the Server Config, SQL and List sections, require Server Administrator security rights.

All API functions are protected by an HTTP login. Whatever program you use to fetch URLs will need to pass a valid name and password when fetching the API URL (all the examples above do so). For example, in Perl this is accomplished with the command:

```
$req->authorization_basic('admin', 'lyris');
```

while in many other languages this is simply accomplished by adding username:password to the URL, like so:

```
http://username:password@hostname/utilities/other/api/test_do
```

If you are an administrator of a shared server, note that your list administrators do have access to a smaller set of the programming API, which includes most of the members API, so that they can program direct subscription management scripts.

### **Performance**

The speed of most API functions is fast enough for most applications.

However, if you have bulk operations you need to accomplish, such as importing a member list, you should work directly with the SQL database that ListManager is using.

## **Administration**

### **Utilities: Administration**

---

This menu allows you to administer your lists, topics, sites and server. You may also create new administrators.

#### **Administrators**

Create or edit [List](#), [Site](#) and [Server](#) administrators for ListManager, and [permission groups](#) for various accessibility levels.

#### **Lists**

Create or delete [lists](#). Available to site or server administrators only.

#### **Server**

Edit [server wide](#) settings that affect sending and delivery for all lists.

#### **Sites**

Create and edit [sites](#). Only server administrators can create sites.

#### **Topics**

Create and edit [topics](#).

#### **Billing**

## **Admins**

### **Utilities: Administration: Administrators**

---

This page allows you to manage administrators at all levels according to your administrative privileges.

ListManager allows full delegation of rights and responsibilities to others, so that administrators only have control over what is appropriate for them to control. The three kinds of administrators are:

### **List Administrators**

Typically, someone (or several people) on each mailing list act as the administrator of the mailing list. They can add and remove members of the group, approve moderated messages, and other things which concern regular mailing list maintenance. A list administrator can only make other list administrators.

### **Site Administrators**

A site administrator typically doesn't deal with the day-to-day workings of a mailing list. Instead, the site administrator can create and remove mailing lists, create documents, create auto-responders and other functions that affect the site as a whole. A site administrator is also entitled to act as the list administrator of any mailing list in their site, and may make other site administrators or list administrators.

Site administrators are often unaware of other sites on the server, nor are they aware of mailing lists belonging to these other sites.

### **Server Administrators**

The server administrator controls how the server runs. The server administrator can create sites, and has control over things that affect all the sites and lists on their server. A server administrator can access all Site and List administration menus, and may make other administrators at any level.

**NOTE** Each administrator should have a unique login. Shared logins may cause web interface conflicts.

### **Permission Groups**

## **List Administrators**

# **Utilities: Administration: Administrators: List Administrators**

---

A list administrator is a list member with additional administrative rights. To be a list administrator, a member must have a name and password specified, and the setting Is List Admin? must be set to "yes."

A table of the list's administrators is displayed here. If you have access to other lists on the server, the administrators for those lists will be displayed here as well.

### **Finding Administrators**

Twenty list administrators are displayed at one time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of administrators at a time.

You may change the sorting order of the administrators by clicking the up or down triangles next to Email and Name. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click on next to see the next twenty administrators, previous to see the last twenty.

### Viewing or Editing An Existing Administrator

To view an administrator, click on the admin's email address. You will be taken to the [Members: View Members: Edit Member](#) screen, where you can view or edit the administrator.

### Copying an Administrator

Click **Copy** next to the administrator you'd like to copy. ListManager will show you the old name and email address, and will ask you the new name and email address you'd like. The member created will have all of the settings of the old member, including the password.

### Deleting an Administrator

Click **Delete** next to the administrator you'd like to delete. ListManager will ask you if you're sure before deleting the administrator.

### Creating a New Administrator

Click create new Administrator to be taken to Members: View Members: New List Admin, which is identical to [Members: Add Members: Add Member](#) except the settings are appropriate for a list admin and you will be prompted for a password on the Basics tab.

Note that if an address is currently a member on the list as a non-administrator, you will not be able to create them as an administrator here. Instead, you will need to find the member in [Members: View Members](#) and change the settings.

### Download as a File

Click on the disk icon to download your list of admins in CSV format.

## Site Administrators

# Utilities: Administration: Administrator Accounts: Site Administrators

---

### Finding Site Administrators

Twenty site administrators are displayed at one time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of administrators at a time.

You may change the sorting order of the administrators by clicking the up or down triangles next to Email and Name. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty administrators, **Previous** to see the last twenty.



## Viewing or Editing An Existing Administrator

To view an administrator, click on the admin's name.

## Copying an Administrator

Click **Copy** next to the administrator you'd like to copy. ListManager will show you the old name and email address, and will ask you the new name and email address you'd like. The administrator created will have all of the settings of the old administrator, including the password.

## Deleting an Administrator

Click **Delete** next to the administrator you'd like to delete. ListManager will ask you if you're sure before deleting the administrator.

## Creating a New Administrator

Click create new administrator. You will be taken to Utilities: [Administration: Administrator Accounts: Site Administrator: New Site Administrator](#).

## Download as a File

Click on the disk icon to download your list of admins in CSV format.

# Utilities: Administration: Administrators: Site Administrator: New Site Administrator: Essentials

### Name

Required. The name of this administrator.

### Email Address

Required. The email address of this administrator.

### New/Verify Password

Required. The password for this administrator, masked and encrypted. To change the password, it must be entered twice to verify it has been entered correctly.

If the email address has multiple accounts on the server, you will be prompted to select which accounts to apply the new password to.

### Sites

The sites accessible to this administrator. Click on Choose Sites to select or deselect sites for this administrator. You will be taken to [Utilities: Administration: Administrator Accounts: Site Administrator: Choose Sites](#).

### Permission Group

Select the URL page permission group for this site administrator from the drop-down menu. This enables administrators to either allow or deny access to specific URLs

within ListManager. To allow this administrator access to all URLs, select "Allow all". In order for permission groups to appear here, they must first be created in [Utilities: Administration: Administrators: Permission Groups](#). ListManager includes some default permission groups which will be listed here as well.

The default setting is "Allow all".

### **Enable WYSIWYG Editor**

By default the [HTML editor](#) is available to administrators in Content and Mailings. Some administrators may prefer to have the HTML editor always disabled, especially if they are always using their own HTML, which may be munged by ListManager's included HTML editor.

Note that if an administrator is both a list and site or server administrator, the site or server admin setting for Enable WYSIWYG Editor will override the list administrator setting.

## **Utilities: Administration: Administrators: Site Administrator: Choose Sites**

---

This page displays the sites that are available to you. By default, the current site will be selected for this administrator. To select specific sites, click on them under Available Sites and click on the >> button to move them to the Chosen Sites. To deselect a site, click on it and click on the << button to move them to Available Sites. You may use the Ctrl key to select multiple sites at a time.

## **Utilities: Administration: Administrators: Site Administrator: New Site Administrator: Contact Info**

---

This page is for informational purposes only.

### **Telephone Number**

The telephone number of the administrator.

### **Fax Number**

The fax number of the administrator.

### **Postal Address**

The postal address of the administrator.

# Utilities: Administration: Administrators: Site Administrator: New Site Administrator: Personal Info

---

This page is for informational purposes only.

## Language

The administrator's primary language.

## Comment

Any additional comments about the administrator.

## Server Administrators

# Utilities: Administration: Administrators: Server Administrators

---

Server Administrators are the most powerful administrators in ListManager. They have access to all lists and sites, and may modify server settings. They may also make changes to the database through ListManager, and see reports about server performance.

## Finding Server Administrators

Twenty server administrators are displayed at one time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of administrators at a time.

You may change the sorting order of the administrators by clicking the up or down triangles next to Email and Name. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty administrators, **Previous** to see the last twenty.

## Viewing or Editing An Existing Administrator

To view an administrator, click on the admin's name.

## Copying an Administrator

Click **Copy** next to the administrator you'd like to copy. ListManager will show you the old name and email address, and will ask you the new name and email address you'd like. The administrator created will have all of the settings of the old administrator, including the password.

## Deleting an Administrator

Click **Delete** next to the administrator you'd like to delete. ListManager will ask you if you're sure before deleting the administrator.

### **Creating a New Administrator**

Click create new administrator. You will be taken to [Utilities: Administration: Administration Accounts: Server Administrators: New Server Administrator](#).

### **Download as a File**

Click on the disk icon to download your list of admins in CSV format.

## **Utilities: Administration: Administrators: Server Administrators: New Server Administrator: Essentials**

---

### **Name**

Required. The name of this administrator. It is not recommended that you change the name of the "Admin" server administrator to another name, because it will cause problems with any subscribe forms you create.

### **Email Address**

Required. The email address of this administrator.

### **New/Verify Password**

Required. The password for this administrator, masked and encrypted. To change the password, it must be entered twice to verify it has been entered correctly.

If the email address has multiple accounts on the server, you will be prompted to select which accounts to apply the new password to.

### **Permission Group**

Select the URL page permission group for this server administrator from the drop-down menu. This enables administrators to either allow or deny access to specific URLs within ListManager. To allow this administrator access to all URLs, select "Allow all". In order for permission groups to appear here, they must first be created in [Utilities: Administration: Administrators: Permission Groups](#). ListManager includes some default permission groups which will be listed here as well.

The default setting is "Allow all".

### **Enable WYSIWYG Editor**

By default the [HTML editor](#) is available to administrators in Content and Mailings. Some administrators may prefer to have the HTML editor always disabled, especially if they are always using their own HTML, which may be munged by ListManager's included HTML editor.

Note that if an administrator is both a list and site or server administrator, the site or server admin setting for Enable WYSIWYG Editor will override the list administrator setting.

## **Utilities: Administration: Administrators: Server Administrators: New Server Administrator: Contact Info**

---

This page is for informational purposes only.

### **Telephone Number**

The telephone number of the administrator.

### **Fax Number**

The fax number of the administrator.

### **Postal Address**

The postal address of the administrator.

## **Utilities: Administration: Administrators: Server Administrators: New Server Administrator: Personal Info**

---

This page is for informational purposes only.

### **Language**

The administrator's primary language.

### **Comment**

Any additional comments about the administrator.

## **Permission Groups**

## **Utilities: Administration: Administrators: Permission Groups**

---

The default [list, site and server administration levels](#) are all many ListManager users need. However, some require more granular administration capabilities, such as the ability to restrict some admins to only creating content, or only viewing reports.

Permission groups allow customizable access to ListManager's administrative interface by allowing or denying administrators access to particular ListManager interface URLs. ListManager includes several permission groups, which may be edited.

Once a permission group has been created, administrators can then be assigned to it in Utilities: Administration: Administrators.

Administrators assigned to a permission group will be able to access those ListManager administrator interface pages permitted to the group. Attempts to access restricted page will display a message saying the administrator does not have permission to access that particular page.

Permission Groups is an *Enterprise* level feature. To upgrade your license, please contact your Lyris sales representative at [sales@lyris.com](mailto:sales@lyris.com).

### Permission Group Features and Limitations

To prevent administrators from being inadvertently locked out of ListManager, the ListManager homepage and the login page are always accessible to all administrators, regardless of any rules created to deny access to these URLs.

- This feature has no effect on email commands. To block all email commands by a user, ban their email address to the listmanager@ address with a [match phrase](#).
- The "admin" user (the login name "admin") is unaffected by any permission group setting. This limitation prevents you from accidentally locking yourself out of your own server; admin will always have access to everything.
- All admins created or edited will, by default, have the same permission group applied to the current logged in administrator. Therefore, when an administrator with a particular set of access rules is logged in, any new administrators created at that time will have the same rules applied to them by default.
- If a user name/password allows access to multiple lists, the permission group assigned to the user for this list will be used.
- Permission groups do not apply to the [discussion forum interface](#).

### Finding Permission Groups

Twenty permission groups are displayed at one time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of groups at a time.

You may change the sorting order of the permission groups by clicking the up or down triangles next to Group and Description. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty permission groups, **Previous** to see the last twenty.

ListManager includes several default permission groups:

- Approve Mailings (users are only allowed to approve mailings)
- Create Content (users are only allowed to create content)
- Create Mailings (users are allowed to create mailings, but cannot schedule or send them, or use utility functions)

- No Server Administration (users are blocked from the server administration pages)
- No Utilities (users are blocked from using the utilities section)
- No Web Interface Access (users are not allowed to use the web interface, and can only access the homepage, the login page, and the discussion forum interface. In addition they can use email commands, which are not affected by permissions groups.)
- Read Only Observer (users who cannot add, delete, or change any data)
- Reports Only (users are only allowed to view reports)

### Viewing Or Editing An Existing Permission Group

To view the rules set for a particular permission group, click on the group name. This takes you to the [Utilities: Administration: Administrators: Permission Groups: Permission Rules](#) page, where all the rules for this group are displayed.

### Renaming Permission Groups

Click "rename" next to the desired group to change the name of the group. This takes you to the [Utilities: Administration: Administrators: Permission Groups: Rename Permission Group](#) page. The description can be edited here as well.

### Copying Permission Groups

Click **Copy** next to the permission group you'd like to copy. ListManager will show you the old name, and will ask you for the new name. The default copy name is the original permission group name with "-copy" added to the end. The permission group created will have all of the settings and rules of the old group.

### Deleting Permission Groups

Click **Delete** next to the permission group you'd like to delete. All the rules for the group will also be displayed and deleted. ListManager will ask you if you're sure before deleting the group.

### Creating a New Permission Group

Click on create new group. You will be taken to the [Utilities: Administration: Administrators: Permission Groups: New Permission Group](#) page.

### Download as a File

Click on the disk icon to download your list of permission groups in CSV format.

## Utilities: Administration: Administrators: Permission Groups: New Permission Group

---

To learn how permission groups work, see [Utilities: Administration: Administrators: Permission Groups](#).

Once you have created a new permission group, you will be taken to the Utilities: Administration: Administrators: Permission Groups main page. From this page, you may

select the permission group you have created and add, edit or delete permission rules for it.

### **Permission Group Name**

Enter a name for the new permission group. This can include any alphanumeric characters, including spaces, and can be up to 50 characters in length.

### **Description**

Enter a relevant description for the permission group. This can include any alphanumeric characters, including spaces, and can be up to 100 characters in length. Make sure the description is helpful in your understanding of what this permission group will allow and disallow. For instance, "users are blocked from the server administration page".

## **Utilities: Administration: Administrators: Permission Groups: Rename Permission Group**

---

To learn how permission groups work, see [Utilities: Administration: Administrators: Permission Groups](#).

### **Permission Group Name**

Enter a new descriptive name for the permission group. The current name will be displayed in this field and should be replaced. This can include any alphanumeric characters, including spaces, and can be up to 50 characters in length.

### **Description**

Enter a new description for the group. The current description will be displayed in this field and should be replaced. This can include any alphanumeric characters, including spaces, and can be up to 100 characters in length. Make sure the description is helpful in your understanding of what this permission group will allow and disallow.

Once the group has been renamed, click **Save** to save the renamed group.

## **Utilities: Administration: Administrators: Permission Groups: Permission Rules**

---

[Permission groups](#) enable administrators to create rules which either allow or deny users access to particular URLs within ListManager. If a page in ListManager contains a word or location which has been set to "deny" access, the user will not be able to access that particular URL. There are several default groups included, which can be edited. New groups can be created to customize the accessibility you would like to give



your users. These rules work like firewall rules; if no permission rule matches, the default is to accept the user and allow access. If users are denied, a message informing them that they do not have permission to access that particular page will be displayed.

There is no limit to the number of rules which can be set for any group. The permission is either set to allow or deny access to a particular URL or to all URLs with a specific word, and the order in which ListManager reads these permission levels can be determined by moving the individual rules up or down in the hierarchy. These rules are then applied to [list](#), [site](#), or [server](#) administrators as they are created.

### Finding Permission Rules

Twenty permission rules are displayed at one time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of rules at a time. The permission rules will be listed in order, from lowest to highest. This table cannot be sorted, since the order in which they appear is relevant to their functionality.

### Viewing Or Editing An Existing Permission Rule

To view a permission rule, click on the group name. This will take you to the [Utilities: Administration: Administrators: Permission Groups: Edit Permission Rule](#) page, where the rule can be edited. Note that you will not be able to edit your own permissions.

### Copying Permission Groups

Click **Copy** next to the permission rule you'd like to copy. ListManager will show you the old description, and will ask you for the new description. The default copy name is the original permission rule name with "-copy" added to the end. The permission rule created will have all of the settings of the old rule.

### Deleting Permission Rules

Click **Delete** next to the permission rule you'd like to delete. ListManager will ask you if you're sure before deleting the permission rule.

### Moving Rule Hierarchy Up

Click "up" next to the rule you want to shift one level up. This moves it *one* level up and changes the order number. For example, if you have two rules, with order 1 and 2, and you click "up" next to rule 2, it will reverse the order:

Rule A    Order 1  
Rule B    Order 2 (move up)

becomes:

Rule B    Order 1  
Rule A    Order 2

### Moving Rule Hierarchy Down

Click "down" next to the rule you want to shift one level down. This moves it down *one* level and changes the order number. For example, if you have two rules, with order 1 and 2, and you click "down" next to rule 1, it will reverse the order:

Rule A    Order 1 (move down)

Rule B Order 2

becomes:

Rule B Order 1  
Rule A Order 2

### Creating a New Permission Rule

Click the add rule button. You will be taken to the [Utilities: Administration: Administrators: Permission Groups: Permission Rules: Add Permission Rule](#) page. Here, a new rule and the corresponding order can be created for this permission group.

### Download as a File

Click on the disk icon to download your list of permission rules in CSV format.

## Utilities: Administration: Administrators: Permission Groups: Add Permission Rule

---

To learn how permission groups work, see [Utilities: Administration: Administrators: Permission Groups](#).

### Action

Select **Allow** or **Deny** from the drop-down menu. **Allow** will enable the user assigned to this group to access the URL entered below, and **Deny** will not.

### URL Pattern

Enter the URL pattern or word for which the user will be allowed or denied access to. This is what ListManager will search for in the URL of every page that this user tries to log into.

Examples:

1. Choose **Deny** from the drop-down menu, and enter "CSV" in the **URL Pattern** field:

CSV

This user will not be allowed to download any CSV files in ListManager. Every time the user tries to download a file and ListManager tries to go to the URL containing the word "csv", it will deny permission and display a message informing the user that they do not have permission to access this. If it is set to "Allow", the user will seamlessly access the CSV page.

2. Choose **Allow** from the drop-down menu, and enter

/utilities/administrators/

in the **URL Pattern** field. This user will be allowed access to the Administration section of Utilities.

**NOTE** Do not use the full path. Omit http://yourserver.

## Description

Enter a relevant description for this rule. It can be up to 100 alphanumeric characters in length.

## Rule Order

Enter the rule order to be applied for this rule. ListManager will read them from lowest to highest, starting with rule 1. If there are skipped numbers, it will also read in order. For instance, if there is a rule 1 and a rule 3, it will obey them in that order. If you try to enter a rule with an existing order number, it will automatically create it with the next order number available. The default order number will be the next available one, so if you have rules 1-5 set, the default number will be 6.

# Utilities: Administration: Administrators: Permission Groups: Edit Permission Rule

---

To learn how permission groups work, see [Utilities: Administration: Administrators: Permission Groups](#).

## Action

Select **Allow** or **Deny** from the drop-down menu. **Allow** will enable the user assigned to this group to access the URL entered below, and **Deny** will not.

## URL Pattern

Enter the URL pattern or word for which the user will be allowed or denied access to. This is what ListManager will search for in the URL of every page that this user tries to log into.

Examples:

1. Choose **Deny** from the drop-down menu, and enter "CSV" in the **URL Pattern** field:

CSV

This user will not be allowed to download any CSV files in ListManager. Every time the user tries to download a file and ListManager tries to go to the URL containing the word "csv", it will deny permission and display a message informing the user that they do not have permission to access this. If it is set to **Allow**, the user will seamlessly access the CSV page.

2. Choose **Allow** from the drop-down menu, and enter

/utilities/administrators/

in the **URL Pattern** field. This user will be allowed access to the Administration section of Utilities.

## Description

Enter a relevant description for this rule. It can be up to 100 alphanumeric characters in length.

### **Rule Order**

Enter the rule order to be applied for this rule. ListManager will read them from lowest to highest, starting with rule 1. If there are skipped numbers, it will also read in order. For instance, if there is a rule 1 and a rule 3, it will obey them in that order. If you try to enter a rule with an existing order number, it will automatically create it with the next order number available. The default order number will be the next available one, so if you have rules 1-5 set, the default number will be 6.

## **Lists**

### **Utilities: Administration: Lists**

---

This page allows you to select a list to edit or create a new one. To edit your list's settings, in the left Navigation bar, click **Utilities**, point to **Administration**, and then click **Lists**.

You can view the different lists designated to each site by selecting the correct site from the "Site" drop-down listbox. Then only the lists for that site will be displayed below.

#### **Finding a List**

Twenty lists are shown at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of administrators at a time.

You may change the sorting order of the lists by clicking the up or down triangles next to Name or Description. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty lists, **Previous** to see the last twenty.

#### **Viewing or Editing a List**

To view a list, click on the name next to the list you'd like to view. You will be taken to the [Utilities: List Settings](#) page, where you can view or edit the list.

#### **Copying a List**

Click **Copy** next to the list you'd like to copy. ListManager will show you the old name and description for the list, and ask you for a new name and description. It will also ask if it should copy all the old list's administrators to the new one, and if it should copy all the members from the old list to the new one.

#### **Deleting a List**

Click **Delete** next to the list you'd like to delete. ListManager will ask you if you're sure before deleting the list. If that list is sending a mailing, the currently active recipients will be sent to before the list is deleted.

Note that you cannot delete the list you are currently logged into. [Log in](#) to a different list to delete the list you're currently logged into.

### **Creating a List**

Click create new list to be taken to the [Utilities: Administration: Lists: New List](#) page.

### **Download as a File**

Click on the disk icon to download your list of lists in CSV format.

## **Utilities: Administration: Lists: New List**

---

This page allows you to create a list quickly and easily with the settings appropriate for your type of list. You can always edit the settings later in the [Utilities: List Settings](#) menu.

### **Purpose of List**

The purpose of list determines what the default settings Select the type of list you want to create. This selection will have a significant impact on your default list settings. The list types are:

#### **Email Marketing**

(Email sent from one person to many, with marketing features)

All list settings will be appropriate for a list intended for email marketing. The list will be configured so only administrators may send email to the list. If members reply to the message, their responses will go to the message's author. This type of list is not available as a Newsgroup by default; in order to make this available for newsgroups, it needs to be enabled in [Utilities: List Settings: Discussion Forum Interface: Message Reading](#). Here, in the discussion forum interface, visitors cannot read archives if they log into the interface.

Open and Clickthrough tracking is on by default for all new mailings sent from an email marketing list.

Full personalization of messages (conditional content, mail merge) is possible because [full scripting](#) is enabled for administrators. The list will accept messages from other lists as a [child list](#). [Mailing and clickthrough data](#) will be kept forever.

Messages sent to the list must be approved before they will be sent. The list settings may be changed later in the [Utilities: List Settings](#) menu.

The list settings may be changed later in the [Utilities: List Settings](#) menu.

#### **Announcements**

(Email sent from one person to many)

All list settings will be appropriate for a one-way announcement list. The list will be configured so only administrators may send email to the list. If members reply to the message, their responses will go to the message's author. This type of list is not available as a Newsgroup by default; in order to make this available for newsgroups, it needs to be enabled in [Utilities: List Settings: Discussion Forum](#)

[Interface: Message Reading](#). Here, in the discussion forum interface, visitors cannot read archives if they log into the interface.

Open and Clickthrough tracking is off by default for all new mailings sent from an announcement list.

Messages can be personalized because [safe scripting](#) is enabled for administrators. The list will not accept messages from other lists as a [child list](#). [Mailing and clickthrough data](#) will be kept for 35 days.

Messages sent to the list must be approved before they will be sent. The list settings may be changed later in the [Utilities: List Settings](#) menu.

### **Discussion (moderated)**

(Email sent to and from many people, moderated)

All list settings will be appropriate for a moderated discussion list. The list will be configured so that all list members may send email to the list. If members reply to the message, their responses will go to the list. Messages sent to the list must be moderated by an administrator. [Mailing and clickthrough data](#) will be kept for 5 days.

Unlike email marketing and announcement lists, discussion lists are available as a Newsgroup by default, and in this type of list, visitors are allowed to read archives from the list in the discussion forum interface. For discussion lists, advanced scripting/merge is off by default, so content cannot be personalized the way it is for email marketing and announcement lists. To turn it on, it must be enabled in [Utilities: List Settings: For Programmers: Email Scripting](#).

Open and Clickthrough tracking is off by default for all new mailings sent from a discussion list. This type of list is not automatically enabled as a child list, meaning it will not accept postings from other lists.

The list settings may be changed later in the [Utilities: List Settings](#) menu. Once a list has been created, the

### **Discussion (unmoderated)**

(Email sent to and from many people, unmoderated)

These function exactly like moderated discussion lists, with the exception that no moderation is required. Note that lists without moderation may be subject to spamming and flame wars, and are only recommended for small, self-controlled lists.

All list settings will be appropriate for an unmoderated discussion list. The list will be configured so that all list members may send email to the list. If members reply to the message, their responses will go to the list. No messages sent to the list will be moderated, unless sent by an administrator using the ListManager web interface. [Mailing and clickthrough data](#) will be kept for 5 days.

Unlike email marketing and announcement lists, discussion lists are available as a Newsgroup by default, and in this type of list, visitors are allowed to read archives from the list in the discussion forum interface. For discussion lists, advanced scripting/merge is off by default, so content cannot be personalized the way it is for email marketing and announcement lists. To turn it on, it must be enabled in [Utilities: List Settings: For Programmers: Email Scripting](#).

Open and Clickthrough tracking is off by default for all new mailings sent from a discussion list. This type of list is not automatically enabled as a child list, meaning it will not accept postings from other lists.

The list settings may be changed later in the [Utilities: List Settings](#) menu.

### List Name

Required. Single word name for this mailing list (for example, "jazztalk"). Since this name will determine the list's email address (e.g., "jazztalk@clio.example.com"), we recommend you limit it to fewer than 15 characters. Select the list name carefully—once configured, it cannot be changed! Use only lower-case alphanumeric characters (a-z, 0-9), hyphens (-), or underscores ( \_ ). Do not use spaces.

### List Description

Required. A very short description of the mailing list. This description will be visible to users. Also, when email goes out from the group, this description will be in the email message. Do not use any commas or "<" or ">" characters in your description.

For example, if the Description is *Jazz Discussion*, the Reply-To: field for mailing list email will be:

Reply-To: Jazz Discussion <jazz-discuss@minerva.acme.com>

### Admin Name

Required. The name of the administrator for this list. (Can be changed later in [Members: Edit Member.](#))

### Admin Email Address

Required. The email address of the administrator for this list. (Can be changed later in [Members: Edit Member.](#))

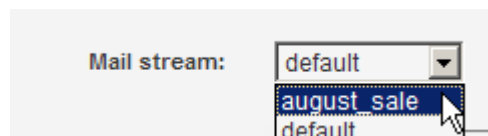
### Admin Password

Required. The password of the administrator for this list. (Can be changed later in [Members: Edit Member.](#))

### Mail stream

#### To select a mail stream

Click the **Mail stream** drop-down list, and then choose the mail stream you want.



[Mail streams overview](#)

[Create a new mail stream](#)

### Recency limit

This setting excludes those who have received a certain amount of mail recently from receiving more mail. By default, ListManager will send to everyone regardless of how much mail they have received recently. Setting a recency limit for the list allows you to prevent members from receiving email if they have received the amount of mail in the number of preceding days that you specify here.

By default, no recency limit is set. To set or edit your recency limit, click *edit recency*. You will be taken to [Utilities: List Settings: Basic Information: Choose Recency](#). To remove a previously set recency setting, click *clear recency*.

Note that a recency limit will not be available for your first list.

## Server

### Utilities: Administration: Server

---

The Server Administrator has control over all the sites and all the mailing lists on that machine. Therefore, the settings in this section affect all sites and all lists on one server. To affect things that are specific to a single site or a single mailing list, you would use the commands in [Utilities: Administration: Sites](#) or [Utilities: Administration: Lists](#) sections. As a server administrator, you automatically have security clearance in those sections.

#### Server Settings

Modify essential server settings.

#### Operational Statistics

View statistics about ListManager's general functioning, your license capabilities, and mailing statistics.

#### Server Log

View or delete information about your server's activities.

#### Database

Administer the ListManager database.

#### Debug Log

Diagnose and see any problems associated with the log files created by ListManager.

#### Web Access Log

View log entries containing web access information.

#### Internationalization and Localization

Configure the character sets you use to write messages and other languages, and change the ListManager interface into other languages.



## **DNS Diagnostic Tool**

Check how ListManager resolves a domain.

## **Server Settings**

### **Utilities: Administration: Server: Server Settings**

---

This section stores several settings that apply to the entire server, such as your ListManager Serial number.

#### **Basic Settings**

Your serial code, and admin email address.

#### **Machine Settings**

#### **Network Settings**

TCP/IP settings and ports for sending and receiving email.

#### **DNS Bypass**

#### **Domain Connection Limits**

#### **Security**

User feature limits, bans of particular addresses, and GUI host configuration.

#### **Automatic Maintenance**

Error mail handling, statistic logging intervals, purging data and mail loop protection.

#### **Scheduled Tasks**

#### **Advanced**

Message and digest wrapping for the entire server, and tools for programmers.

#### **Map of all Settings**

## Utilities: Administration: Server: Server Settings: Basic Settings: Basic Settings

---

### Admin email address

This field should contain the email address of the administrator of this server. ListManager uses this email address to send critical information messages to. For example, if a mail loop is detected, ListManager will automatically end the loop, and notify the email address given here of the loop that occurred.

### Forwarding orders

Forwarding orders allow ListManager to receive email for a given email address, and forward that email to another email address. For example, you might want to define an "administrator" (or "admin") email address on your server and have it forwarded to your personal email address.

You can define as many forwarding orders as you like, each one separated by a carriage return. Each forwarding order has two parts: the first part is the email address you want ListManager to match on (the address on the ListManager) and the second part (separated by a space) is the email address to forward email to.

Here is an example of two forwarding orders that forward mail from "admin" and "administrator" on a server named "server5.example.com":

```
admin@server5.example.com bob@example.com  
administrator@server5.example.com bob@example.com
```

You can specify multiple people to forward to, by separating each destination email address with a comma. One use of this feature might be to make a "cross-posting" address for multiple lists. Mail sent to this address could automatically be forwarded to several mailing lists. Another use of this feature is if there are several administrators who should receive the same email.

Here is an example:

```
admins@example.com bob@example.com, jane@example.com
```

When forwarding to multiple recipients, be sure to separate each recipient address with a single comma, with no spaces between each email address; otherwise your forwarding order will not work.

### Rewrite incoming "From:" header

Optionally rewrite incoming From: mail addresses using these rules.

This feature is useful when your users have slightly varying email addresses. For instance, a user's email address might sometimes say "bob@example.com" and other

times say "bob@mail.example.com". This feature lets you rewrite an email address so that it becomes something else.

To create an incoming "From" header rewrite rule, specify the string to search for, a space, and then the replacement string. The process is a simple search and replace in the "From" header. If the first string is found, then it is replaced with the second string.

You can specify as many rewrites as you like, each on a separate line.

Example:

```
@mail.example.com @example.com
```

In this case, the email address jane@mail.example.com will be rewritten to jane@example.com.

The incoming mail rewrites only apply mail coming into (being delivered to) ListManager. Outgoing mail addresses are not affected.

### **Rewrite incoming "To:" header**

Optionally rewrite incoming To: mail addresses using these rules.

This feature is useful for creating aliases. For instance, you may want people to be able to send mail to "listservices@..." and have it delivered to ListManager as "listmanager@...."

To create an incoming "To" header rewrite rule, specify the string to search for, a space, and then the replacement string. The process is a simple search and replace in the "To" header. If the first string is found, then it is replaced with the second string.

You can specify as many rewrites as you like, each on a separate line.

Example:

```
listservices@ listmanager@
```

In this case, the email address listservices@mail.example.com will be rewritten to listmanager@mail.example.com.

The incoming mail To: rewrites only apply mail coming into (being delivered to) ListManager. Outgoing mail addresses are not affected.

### **Remove command email addresses**

This option allows you to prevent ListManager from listening for command email addresses you specify.

By default, ListManager accepts email for a variety of command addresses, such as "subscribe-listname@..." "help@..." "info@..." and many others. To prevent ListManager from responding to these addresses, list them here, one per line.

See [Command Email Addresses](#) for a complete list of all ListManager command addresses. Note that if you are using a [Rebrandable](#) server, the rebrand email address is also a command email address.

Enter the command address only, not the server domain name, one per line.

Examples:

```
subscribe-jazztalk  
help  
info
```

## Utilities: Administration: Server: Server Settings: Basic Settings: Interface Messages

---

### Home Page Notice

When specified, this text will be displayed at the top of the ListManager home page. If ListManager is clustered, all nodes will display this text.

The home page notice may be used to alert users of changes or planned system downtime.

You may enter the text in HTML. Or, check the box at the bottom of the field to have ListManager convert the text into HTML.

**Note:** Home Page Notice is unavailable in Version 9.

### Server Unavailable Notice

This text will be displayed if ListManager is unavailable but the ListManager web server is running. By default, the message displayed is as follows:

```
<p><b><font size="5">Server Unavailable</font></b></p>  
<p>Could not log you in because the ListManager server could not be  
reached.</p><BR>
```

This server unavailable notice only applies for this ListManager node or machine.

You may enter the text in HTML. Or, check the box at the bottom of the field to have ListManager convert the text into HTML.

If ListManager is unavailable and you would like to change this notice, you may edit the text directly in `~/tclweb/bin/serverdown.txt`.

## Utilities: Administration: Server: Server Settings: Basic Settings: Time Zones

---

On the Time Zone page, you can choose the time zone that you are sending mail from. This ensures that the time applied to your mailings is always correct, even if the clock shifts to accommodate Daylight Savings Time.

### To choose a time zone

1. Click the **Time Zone** box.
2. Do one of the following:
  - Choose the preset that applies to your time zone. For example, if you are located in California, choose **(GMT-08:00) Pacific (US, Canada, Mexico)**.
  - If one of the presets does not suit your need, choose **Custom Definition**.

### To set up a Custom Definition

1. In the **Time Zone** box, choose **Custom Definition**.
2. In the **Offset from GMT** box, type an offset.

GMT stands for "Greenwich Mean Time." Greenwich, England is the location of the Prime Meridian (longitude: 0); the world's 24 time zones are all determined by their relationship to the Prime Meridian. The Eastern Standard Time zone has a GMT offset of five (i.e., it is five time zones west of GMT), so its offset would be **-0500**. The Pacific Standard Time zone is three time zones further west, so its GMT offset would be **-0800**.

3. If your time zone observes Daylight Saving (Summer) Time, click **Yes** next to **Daylight Saving (Summer) Time Observed?** Otherwise, click **No**.

4. In the **DST Start Rule** and **DST End Rule** sections, choose the correct rules for your time zone.

DST (Daylight Savings Time) rules vary depending on which time zone you are in. Arizona, for example, does not observe Daylight Savings Time so it has no rules. For most other U.S. locations, the latest rules were established by the Energy Policy Act of 2005. The Act states that DST now begins at 2 a.m. on the second Sunday of March and ends at 2 a.m. on the first Sunday in November.

5. When you are finished, click **Save**.

### Machine/Node Settings

## Utilities: Administration: Server: Server Settings: Machine/Node Settings: Basics

---

### Serial number

When you test or purchase ListManager, you receive a serial number from your account representative. Your serial number will be registered at Lyris Technologies when this page is saved, and your ListManager [server capabilities](#) will be updated with a new activation code. If you have a firewall, you may need to manually receive and enter an activation code.

If you do not have a serial number (or if your serial code has expired), and if your configuration requires one, your ListManager server will be disabled. Subscribes and

unsubscribes will proceed normally, but you will not be able to post mailings to your list(s).

For more information about your ListManager license and serial code, see [Your ListManager Serial Number](#).

## Utilities: Administration: Server: Server Settings: Machine/Node Settings: Limits

---

### Maximum megabits

The average maximum megabits per second (Mbps) ListManager should use. By default, this setting is "0", meaning use as much bandwidth as necessary.

In some circumstances, ListManager may use all of your bandwidth, limiting other web applications. If you have bandwidth limitations and would like to prevent ListManager from using all of your bandwidth, enter the amount of bandwidth (in Mbps) it should be allowed to use on average.

Note that this feature regulates the average bandwidth used by the server. If you are sending out very large messages, ListManager will send each one as quickly as possible, but then will be idle for a period so that its average bandwidth is what is set here. If you must eliminate large bandwidth spikes as well as regulate your average bandwidth usage, you should consider a hardware solution (a managed switch with rate-limiting).

### Maximum messages per hour

The number of messages your license permits you to send per hour. By default, ListManager will be set to use the maximum number of messages per hour permitted by your license. This setting allows you to lower the maximum number of messages per hour ListManager will send.

Contact your account representative at 800-768-2929 or at [sales@lyris.com](mailto:sales@lyris.com) for more information about increasing the maximum number of messages per hour.

### Maximum simultaneous sends

Controls the number of simultaneous email messages ("sends") that can be sent at once. By default, ListManager will be set to use the maximum simultaneous sends for your license.

In general, the maximum allowed by your license will be sufficient. However, if you are finding that your bandwidth or firewall is being overtaxed by ListManager, you may want to set Maximum simultaneous sends lower.

If you are running a site that has a very large number of one-off messages, such as autoresponders, or many subscriptions, you may want to increase the number. Contact your account representative at 800-768-2929 or at [sales@lyris.com](mailto:sales@lyris.com) for more information about increasing your maximum simultaneous sends.

### **Maximum CPU bound threads**

Configures the number of threads ListManager is capable of using for [DomainKeys](#) signing in the background.

## **Utilities: Administration: Server: Server Settings: Machine/Node Settings: IP Addresses**

---

### **Machine/Node IP addresses**

By default, ListManager will listen for connections on all TCP/IP addresses on the machine it is running on.

If you would like to limit ListManager to only some of your TCP/IP addresses, you may specify them here. If you have changed the IP addresses for this ListManager node, add and delete them here.

When ListManager starts up, it will check your configured Tcl port (default is 2021) for each of the TCP/IP addresses it listens to, to determine if another program is currently using that port and TCP/IP address combination. Two programs cannot both listen to the same TCP/IP address and port. If there is a conflict, ListManager will inform you of the problem.

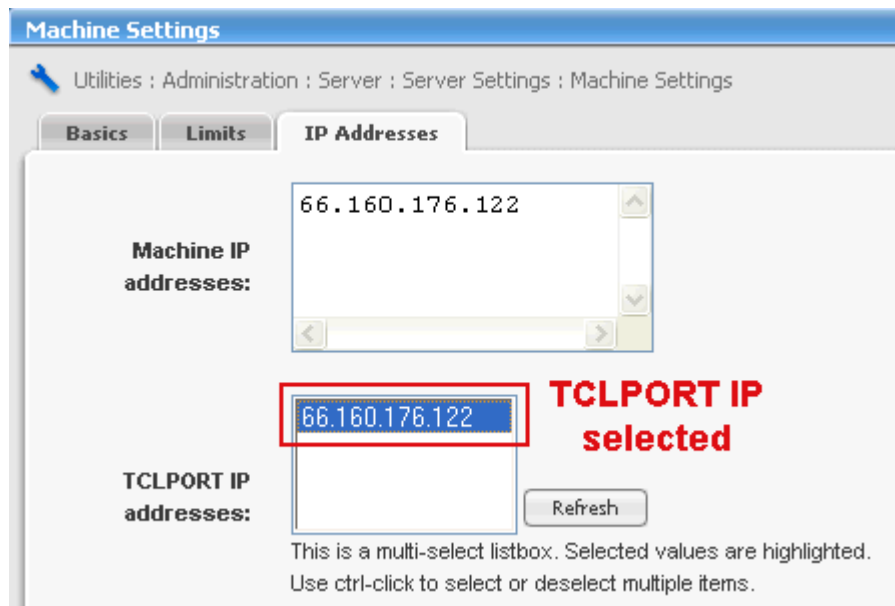
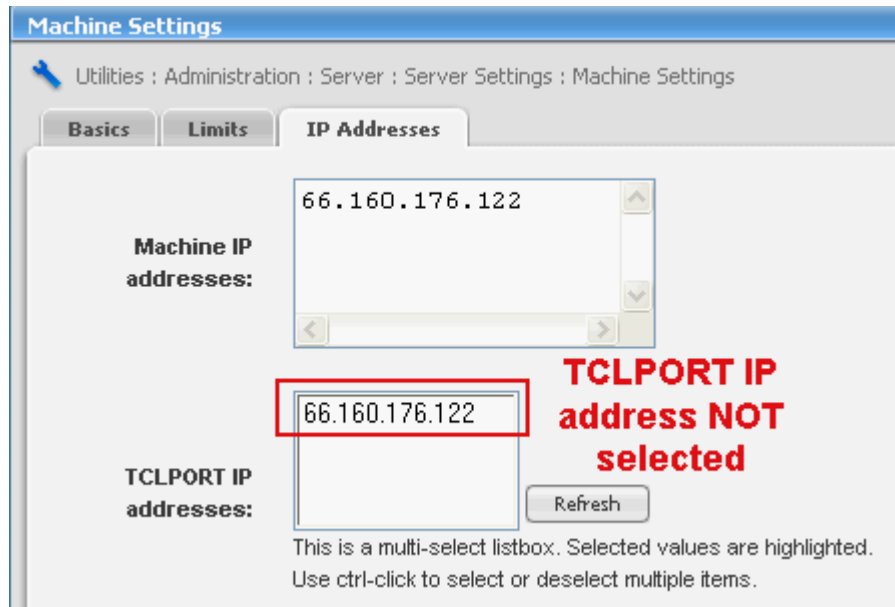
If ListManager is configured on the site or server level to use IP addresses that are not listed here, you will be warned when saving this page.

One reason to use the Machine IP addresses feature is if you want to have ListManager coexist with a mail server also running on your machine. If your mail server can be made to only listen to a specific TCP/IP address, then you can have ListManager listen to the other address(es), and the two programs can coexist on your machine.

### **TCLPORT IP addresses**

Specifies which address(es) ListManager will use for the ListManager web server (HTTP-LM). By default, ListManager will only listen to the loopback address (127.0.0.1). You may specify that ListManager accept connections on other IP addresses here. If you need to have other servers be able to connect to ListManager for scripting, you will need to specify the machine's IP address here.

By default, no TCLPORT IP addresses are selected. Be sure to select one or more IP addresses to connect to ListManager via TCLPORT from a remote server.



#### To select a TCLPORT IP address

1. Highlight the address in the **TCLPORT IP addresses:** window.
2. Click **Save**.
3. ListManager must be stopped and restarted to activate this change.

#### DNS IP Addresses

Specifies which address ListManager will use for UDP DNS lookups. By default, ListManager will use any IP address for DNS. If you must limit which IP address ListManager should use for DNS lookups, specify it here.

#### Global Ban Server IP Address



ListManager may download server-level member bans from a ListManager server that is being used as the central global ban server. This setting allows you to specify which local IP address ListManager should use to communicate with the global ban server. The setting that specifies the remote IP address of the global ban server this ListManager should connect to for global bans is [Utilities: Administration: Server: Server Settings: Advanced: Global Bans](#).

### Node Override HELO text

Normally, the HELO portion of an SMTP transaction is determined by one of the following:

- ListManager uses the [Internet host name](#) for a site; if it is unable to do so, it performs a reverse lookup on the first TCP/IP address of the machine it is running on.
- You can create a HELO string of your own choice on the [Network Settings : Deliver Email](#) page.

If you are [clustering](#) ListManager, either of the above will result in all your nodes generating the same HELO text. To choose unique HELO text for a node, type the text you want in the **Node Override HELO text** box. As the name implies, this will override the other HELO text settings in ListManager.

Example:

```
lists.example.com
```

Changing the HELO text is extremely useful if you are behind a firewall and machines on the Internet cannot resolve the hostname your machine uses.

## Utilities: Administration: Server: Server Settings: Machine Settings: Database Timeouts

---

If your database is exceptionally large, you may experience performance issues. In extreme cases, the web server can lock up waiting for a database connection due to long running database queries. To prevent this, you can specify database timeouts on the Database Timeouts page in ListManager. Recommended values are listed in the table below; you can fine-tune as necessary.

You can also set timeout values in the `lmcfg.txt` file.

Name	Description	Recommended Value
Default Pool	Pool timeouts not defined by any other timeout type	-1 (disabled)
Default Command	Command timeouts not defined by any other timeout type	3600 (2 hours)
List Posting	Task that handles the processing	3600

	of an incoming mailing.	(2 hours)
Nightly Jobs	Used for nightly jobs.	3600 (2 hours)
Incremental Update	Update summary statistics for only those mailings that have changes since the previous update	600 (10 minutes)
TCL Port Pool	Timeout to get a TCL port command connection	60 (1 minute)
TCL Port Command	- Timeout when TCL port command takes too long  - Used for GUI (web server) transactions (HTTP GETs and REQUESTs)	60 (1 minute)
Master Thread Pool	Timeout to get a master thread command connection	1 (1 second)
Master Thread Command	- Timeout when Master thread command takes too long  - Used to accept incoming socket connections	1 (1 second)

## Network Settings

# Utilities: Administration: Server: Server Settings: Network Settings: Receive Email

---

### Forward mail IP address

Optionally forward non-ListManager mail to another SMTP server.

This setting allows ListManager to coexist with another SMTP server on the same machine and IP address.

For instance, if the machine you want to run ListManager on has a mail server running on it (i.e. Sendmail or Post.Office) and you want this machine to continue running a mail server, this setting will allow ListManager to coexist with your mail server.

Mail sending and receiving from both ListManager and your regular mail server is unaffected. In this way, both ListManager and your mail server can coexist on the same machine.

For this setting, specify the TCP/IP address of the receiving mail server.

For example: "127.0.0.1" forwards non-ListManager mail to an SMTP server running on the same machine.

**Important Note:** Because ListManager blindly forwards all non-ListManager mail to the mail server listed here, the receiving email server should have rules so it does not automatically trust any mail received from ListManager. Otherwise, the receiving mail server could become an open relay. ListManager by itself cannot be an open relay.

See [Mail Server Coexistence](#) for more information.

### Forward mail port

Specifies the port ListManager should forward non-ListManager mail. "25" is the standard SMTP port; if ListManager is coexisting on the same IP address as another mail server, you will need to configure that mail server to listen to another port (e.g., 26). You may then specify the port number here.

## Utilities: Administration: Server: Server Settings: Network Settings: Deliver Email

---

### Retry Timing

Sets how many times this server will retry sending failed messages, and the interval in minutes between these retries. Unless explicitly set, the default retry times are "30,720," meaning the first retry will occur 30 minutes after the first attempt, the second retry after 12 hours, and that a total of 2 retries will be attempted. Retry intervals should be separated by commas:

```
30, 60, 90
```

Each interval measures the time, in minutes, between the previous try and the next try. The smallest acceptable retry interval is six minutes and the largest acceptable retry interval is 1440 minutes (24 hours). Retry intervals which are not within the acceptable range will be ignored. For example, if you have one retry of three minutes, no retries will be attempted.

For example, if you want to establish a retry schedule of 30 minutes, two hours, eight hours, and 24 hours, you would enter the following values:

```
30, 120, 480, 1440
```

Please note that the retry interval is measured in relation to the time of the last retry, not the time the message was originally sent.

For most lists, two retries are more than enough. If you are running ListManager for the first time with lists that have many bad email addresses, you may want to have only one retry to make delivery quicker. Once members with bad email addresses have been put on hold and purged (based on your settings in [Utilities: List Settings: Automatic](#)

[Maintenance: Error Mail](#)), your mailing speeds will increase and you may reset the retry timing to less aggressive settings.

This field is limited to one hundred characters for every database except Oracle.

### **Fallback HELO text**

Specifies the string ListManager uses in the HELO portion of the SMTP transaction if ListManager is unable to construct a HELO text from site or DNS information. Normally, ListManager uses the [Internet host name](#) for a site to determine the HELO text. If it is unable to do so, ListManager performs a reverse lookup on the first TCP/IP address of the machine it is running on to determine the HELO string. To have ListManager use a different HELO string, specify it here.

Example:

```
lists.example.com
```

Changing the HELO text is extremely useful if you are behind a firewall and machines on the Internet cannot resolve the hostname your machine uses.

### **Configure Relay Hosts**

Relay all outbound mail through this mail host rather than doing regular direct delivery.

Lyris strongly recommends that you not use a relay host, because ListManager has been optimized to send mail directly to the Internet. Using a relay host may delay mail delivery, and result in inaccurate delivery reports. Some bounced mail may also be returned to the relay host instead of ListManager, preventing ListManager from handling error mail correctly.

However, some environments need outbound mail to be relayed through a specific host. For instance, your organization might employ a TCP/IP firewall that prevents ListManager from directly delivering mail. In such a case, each application behind the firewall must use a relay host to communicate with the outside.

If the specified relay host(s) listed are unavailable, ListManager will consider the failed delivery attempts as transient failures and will attempt retries according to the retry timing specified above.

**NOTE** If one or more relay hosts are defined, [domain connection limits](#) have no effect

## **Utilities: Administration: Server: Server Settings: Network Settings: Relay Hosts**

---

You can specify as many relay hosts as you like. Each entry must be separated by a carriage return. If you specify multiple relay hosts ListManager will automatically distribute the mail relay load between them. If you need to send a great deal of mail through a relay host setup, we recommend that you specify several relay hosts.

If the relay host is defined but unresponsive when ListManager is started or after changing this setting, you will see a warning on the console and ListManager will be unable to deliver mail.

### **Host IP address**

The IP address of the relay host. A mail server must be listening on the IP address you specify.

### **Port**

The port of the relay host receiving SMTP connections.

### **Maximum connections**

The maximum number of connections to be made to this relay host. This setting may be used to prevent the relay host from being overwhelmed with ListManager connections.

**NOTE** If one or more relay hosts are defined, [domain connection limits](#) have no effect

## **Utilities: Administration: Server: Server Settings: Network Settings: Relay Hosts: New**

---

### **Host IP address**

The IP address of the relay host. A mail server must be listening on the IP address you specify.

### **Port**

The port of the relay host receiving SMTP connections.

### **Maximum connections**

The maximum number of connections to be made to this relay host. This setting may be used to prevent the relay host from being overwhelmed with ListManager connections.

**NOTE** If one or more relay hosts are defined, [domain connection limits](#) have no effect

## **Utilities: Administration: Server: Server Settings: Network Settings: Ports**

---

### **Incoming SMTP port**

This setting defines the TCP/IP port ListManager listens on for incoming mail. By default, this setting uses port 25, the Internet standard for receiving SMTP mail. In some situations, you may want to move the ListManager SMTP service to another port. For example, you may have antivirus gateway software listening on port 25. In such a case, you will need to configure your mail system so that the mail that ListManager should get is forwarded on to ListManager at its port. For instance, you might create an alias (a DNS CNAME) for ListManager mail, and inform your mail

system that mail addressed to this alias should be passed on to ListManager on this port assignment.

Note: If you change this port number, and don't work out an alternate way for ListManager to get its mail, ListManager will no longer be able to receive mail, and any mail sent to it from the outside will not reach it.

Note: If no site is configured in ListManager, ListManager will listen to ALL IP addresses on port 25.

### **Newsgroup port**

Specifies the port to be used by the newsgroup server built into ListManager. Most newsgroup browsers expect a news server to be on port 119, so you should only change this port if you understand the implications: all newsgroup browsers using your server will have to explicitly ask for the port you re-assign your server to.

### **DNS port**

Specifies the port to be used by ListManager's DNS engine. By default, all DNS lookups will be performed on port 53, the Internet standard for DNS lookups.

In some situations, you may want to specify that ListManager use a different port for DNS lookups. That port number may be specified here.

### **TCLPORT port**

Specifies the port used by the ListManager web server to communicate with ListManager. By default, it uses port 2021 as its port. Only change this port number if you have a TCP/IP port conflict with another service. This is also the port used by remote servers to connect and execute Tcl commands.

If you change the HTTP-LM port number, you will also need to change the server port setting in the ListManager Web Interface's `tclhttpd.rc` file.

### **TCLPORT password**

(required) The password that you want the ListManager Command Protocol to use. The server uses port 2021 to communicate with the web interface and with other programs. Access to the Command Protocol is password protected, so that outsiders cannot affect your server. The default password is "TCLPORTPasswd". You may want to change this password to give you a greater level of security.

However, if you do change this password, immediately after changing it the web interface will no longer work. This is because the web interface configuration file `tclhttpd.rc` will still have the old password, and will no longer be able to access the Command Protocol of your ListManager. So, immediately after making a change to the Tclport Password and saving the change, you will need to edit the `tclhttpd.rc` file that is found in your ListManager/tclweb/lib directory. You will want to change the line `Config tclport_password {TCLPORTPasswd}` to reflect the new password that you have set.

**NOTE** If you do not change your Tclport Password, you are still well protected by the Tclport Hosts setting available at [Utilities: Administration: Server: Server Settings: Security: GUI Hosts](#).

**NOTE** The Tclport password is not encrypted, as it is in `tclhttpd.rc` in plain-text.

## **Utilities: Administration: Server: Server Settings: Network Settings: DNS**

---

ListManager includes its own DNS resolver, and does not require another. We STRONGLY recommend that you use ListManager's DNS resolver. ListManager's DNS resolver has been optimized for fast email delivery. However, if you would like to use

your own DNS server, you may specify its IP address here, and whether you would like to always use it, or only in the event ListManager's DNS resolver fails.

### **DNS Server IP Address**

The IP address of the DNS server ListManager should use. By default, this setting is blank, meaning ListManager uses its own DNS resolver.

### **Use Only for Fallback**

This setting allows the DNS server specified above to be used only if the ListManager DNS resolver fails. Set to "yes" by default.

**NOTE:** To make changes in these settings take effect, you must restart ListManager.

## **DNS Bypass**

# **Utilities: Administration: Server: Server Settings: DNS Bypass**

---

ListManager 6.0h and higher features an integrated DNS engine, so you no longer need to set up, configure, or maintain a separate DNS server. Instead of using a separate process or DNS server to resolve hostnames, ListManager will use its own DNS resolver.

By default, you will see the root name servers used by ListManager for DNS resolution on this page. If you remove these servers, ListManager will not work properly.

DNS Bypass allows you to specify that ListManager use a particular TCP/IP address for a domain. If you are running ListManager behind a firewall or in a DMZ, you may need it to use a particular TCP/IP address to route internal mail for your domain. Otherwise, ListManager will use the external DNS information for sending mail to your domain, which can cause problems with some firewalls. Instead of delivering to the internal IP address, ListManager will use the external DNS information for your domain, requiring the mail to go out through the firewall and then back in again. Some firewalls will refuse this kind of traffic, so you will need to use DNS Bypass to have ListManager route mail correctly inside your firewall.

If you must create a DNS Bypass and you have multiple hostnames for a single domain, you will either need to create a DNS Bypass for each hostname and IP address, or designate that ListManager use a particular name server for a domain.

For example, let's say you have the domain example.com, which has two mail servers: mx1.example.com, and mx2.example.com. You also have an internal DNS server for example.com, ns.example.com. You can either create 2 mx DNS bypasses, one instructing ListManager to use mx1.example.com and one telling it to use mx2.example.com for the example.com domain. Or, you could create an NS DNS bypass that instructs ListManager to use ns.example.com for all DNS lookups for example.com. Note that in this example ns.example.com **MUST** have entries for example.com.

The hostname for each IP address must be unique; for example, you should not have both mx1.example.com and mx2.example.com point to the same IP address.

### Finding a DNS Bypass

Twenty DNS bypasses are shown at a time. You may change the sorting order of the bypasses by clicking the up or down triangles. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty DNS Bypass entries, **Previous** to see the last twenty.

#### Domain

The domain for this DNS bypass entry, e.g. example.com.

#### Hostname

The hostname for this DNS bypass entry, e.g. mx1.example.com.

#### Type

The type of DNS entry: NS or MX.

#### Address

The TCP/IP address for this domain.

### Viewing or Editing a DNS Bypass

To view a DNS bypass, click on the DNS bypass entry's domain. You will be taken to the Utilities: Administration: Server: Server Settings: DNS Bypass Edit page, where you can view or edit the DNS bypass.

### Deleting a DNS Bypass

Click **Delete** next to the DNS bypass you'd like to delete. ListManager will ask you if you're sure before deleting the DNS bypass. You must restart ListManager for this change to take effect.

### Creating A DNS Bypass

Click create new DNS bypass to be taken to the Utilities: Administration: Server: Server Settings: New DNS Bypass page. Or, select **Copy** next to a DNS bypass entry you'd like to copy.

### Download as a File

Click on the disk icon to download your list of DNS bypasses in CSV format.

## Utilities: Administration: Server: Server Settings: DNS Bypass: New DNS Bypass

---

#### Domain

The domain name for this DNS bypass. Example:



example.com

### Hostname

The hostname for this DNS bypass. If there are multiple hostnames for this domain, create a separate DNS bypass entry for each one. Specify only one hostname per DNS bypass. Example:

mx1.example.com

### Type

The type of entry. The choices are:

**NS** - a name server

**MX** - a mail server

### Address

The TCP/IP address ListManager should use for this domain. This IP address should be unique for the hostname above. Specify only one IP address per DNS bypass. Example:

192.168.0.1

## Domain Connection Limits

# Utilities: Administration: Server: Server Settings: Domain Connection Limits

---

By default ListManager will only open 10 connections to any given TCP/IP address. Opening more connections than this is not recommended because the receiving mail server may get overloaded and think that it is under attack, as occurs with a denial-of-service attack. However, some mail servers have instituted anti-spam measures that trigger warnings at even less connection limits, such as 2. So it may be useful, on a case-by-case basis, to be able to change how many connections ListManager opens to a given host.

This feature allows the number of connections to a specific domain to be configured. By default there are no domains listed, so the default of 10 connections per IP address is used. If you add, for example, an entry of bellsouth.net, "2", then any connections that go to a bellsouth.net computer will only open as many as two connections. Computer names 'above' the specified domain will also respect these limits, so in this example, a host of albert.bellsouth.net will also be limited to two connections. The minimum setting allowed is one connection per domain.

ListManager uses a technology called "connection reuse" that allows it to reuse a network connection, rather than disconnecting and re-connecting for each message sent. This technology allows a large amount of mail to be delivered efficiently without requiring a large number of connections. Thus, ListManager may be more efficient in

sending mail with ten connections than other programs would be with 100 connections. This is also why we recommend that you do not increase the number of allowed connections per IP address to more than 10 unless you are certain the mail server can handle this load and will not ban you for overloading their system.

### **To create a new domain limit**

Click the create new limit button:

### **Domain**

Enter the domain name for which you would like to set a limit.  
For example: aol.com

### **Simultaneous Connections**

Enter the connection limit desired. Note that when entering domain limits, only integers can be entered. You can enter a minimum limit of **1** and a maximum of **100**. **Note:** If you intend to use a setting higher than **10**, first ensure that the mail server can handle the load.

This setting works in conjunction with [DNS Bypass](#) settings, in case any high volume providers force high volume email via a separate server.

### **Messages Per Connection**

Determines how many messages can be sent on a single connection.

### **Connections Per Hour**

Determines how many connections you can make per hour.

### **Example:**

You choose the following settings;

**Simultaneous Connections: 1**

**Messages Per Connection: 100**

**Connections Per Hour: 12** (this determines that a new connection will be made every five minutes)

1. ListManager opens a connection and sends 100 messages, then closes the connection.
2. At Minute # 5, the connection reopens, ListManager sends another 100 messages, and then the connection closes.
3. At Minute # 10, the connection reopens, ListManager sends another 100 messages, and then the connection closes.

This cycle repeats until all messages have been sent.

**Note:** These amounts are approximate. The exact number of messages sent may vary depending on several factors, including the response of the mail server.

### **Notes**

- If you leave the **Messages Per Connections** and **Connections Per Hour** settings blank, the amounts for these settings default to "unlimited."
- All settings are per IP address of a destination mail server. If a company has more than one mail server (for example, Yahoo has eight), your sending speed increases accordingly.
- If you use a relay host, all settings on this page are ignored and mail is sent based on the Maximum Connections settings on this page:  
[Utilities: Administration: Server: Server Settings: Network Settings: Relay Hosts](#)
- If one or more relay servers are defined, domain connection limits have no effect

## Security

# Utilities: Administration: Server: Server Settings: Security: User Limits

---

### Allow segment use

This setting determines what level of segment use will be available to list admins for the entire server. There are three levels of permissions:

#### **Simple and advanced segments available to all administrators**

Administrators of all levels may type in SQL queries directly in the Query box, and may access the Advanced and Boundaries tabs when creating a segment. List administrators may alter segment boundaries, which permits them to see and download members from other lists.

#### **Restrict list administrators to simple segments only**

List and site administrators may create segments using the Insert Clause button, but may not type in a query directly. They also will not have access to the Advanced and Boundaries tabs.

#### **Segments available only to server administrators**

List and site administrators will be able to use segments, but not to create them.

By default, ListManager is set to "Simple and advanced segments available to all administrators". Note that this setting allows list administrators to change their segments' boundaries so they may see and download members from other lists for which they do not have administrative rights.

### Scripting feature level

This setting determines what level of scripting or merge will be available for the entire server. There are three levels of permissions:

#### **No Advanced Scripting/Merge**

Disables all advanced scripting. Merging based on the standard ListManager tables is allowed; user-defined fields are not.

### **Safe Scripting/Merge**

Allows only 'safe' advanced scripting. File system, SQL and other potentially harmful access is not allowed.

### **Full Scripting/Merge**

Allows the complete Tcl Interpreter, including file system, SQL, and other access. Important: if you allow full scripting/merge, we recommend that all lists are set up to moderate all incoming messages. Certain Tcl procedures such as "redirect" could be misused. See ListManager Tcl Procedures for more information about the "redirect" command.

By default, Safe Scripting is allowed if you are using ListManager Pro or Enterprise, and No Advanced Scripting if you are using standard ListManager. Safe and Full Scripting/Merge are only available if you are running ListManager Pro or Enterprise.

The level of scripting you select should be determined by the types of lists you're using, and who is likely to post to it. For example, discussion lists are unlikely to need the advanced scripting features, so scripting should be disabled with this setting if all the lists on your server are discussion lists. Even the 'safe' level would likely be unnecessary for this type of list.

Note that this setting overrides the list level [Scripting Level](#) if the setting here is more restrictive than the setting for the list, unless the list's scripting level has been overridden by the server administrator for the list in [Utilities: List Settings: For Programmers: Email Scripting](#).

If you'd like Full Scripting/Merge to be available for admins but not list members, you can set this setting and the list Scripting Level to Full Scripting/Merge, but limit it to admins in the Allow Scripting in Body setting.

### **Hide menus with disclaimers**

Depending on your license, some menu items may be displayed with the disclaimer *Contact your salesperson to enable this feature*. By default, this feature is set to no, so all features are displayed. Change this setting to Yes to hide disabled features.

### **Max message size**

Defines the maximum message size that ListManager will accept. The size is defined in bytes.

This number applies to the ListManager mail receiving engine, and means that messages over this size are refused before they are even saved.

This feature is useful if you want to impose a server-wide maximum message size.

### **Let CSV member imports update non-normal member status**

By default, ListManager will not allow [CSV imports](#) change a member's status to normal if the member's status is anything but normal (unsub, confirm, held, etc). By changing this setting to yes, the member status of any member may be changed by selecting the *Use type setting in CSV file* and *Update existing members?* options when importing members.

## GUI User Timeout

The length of time a user may be idle before the administrator user web interface will time out, forcing the admin to log back in before continuing to work with ListManager. By default, the web interface never times out. Select the length of time a user may be idle before the interface will time out here. Note: this timeout only affects the administrator interface, not the Discussion Forum Interface.

# Utilities: Administration: Server: Server Settings: Security: Bans

---

## Mail Receive Rules

Defines the rules by which ListManager determines whether or not mail should be processed.

By default, ListManager looks at the username of email it receives to determine whether it should process the message. The host name portion of the mail address is not consulted. It does this to support any number of virtual hosts without needing to be configured. By default, ListManager will automatically assume the hostname identity of any email it receives which is addressed to a valid ListManager user name.

This Mail Receive Rules option allows you to change this default behavior, so that ListManager first looks at the rules you have defined, and if the local recipient address does not match a rule, the message is not processed.

The Mail Receive Rules are simple text search rules. For example, to accept any mail addressed to the "yourcompany.com" domain, the rule would be:

```
yourcompany.com
```

This would allow any of these different addresses to be received:

```
listmanager@yourcompany.com  
listmanager@lists.yourcompany.com  
listmanager@discussions.yourcompany.com
```

But any address which did not have "yourcompany.com" in it would be rejected. If your rule was "@yourcompany.com", only the first example above "listmanager@yourcompany.com" would be accepted.

The most common use for this feature is if you are using ListManager in front of another mail server, and you want to make sure that ListManager only accepts mail addressed to itself, and forwards on any mail addressed otherwise. If you have told it to "Forward non-ListManager Mail" to another location, any mail which *does not* match a "Mail Receive Rule" will automatically be forwarded on to the other server. See [Utilities: Administration: Server: Server Settings: Network Settings: Receive Email](#).

If you do not have "Forward non-ListManager Mail" defined, then mail which does not match a Mail Receive Rule will simply be rejected.

You can define multiple Mail Receive Rules, each on a separate line.

### **Ban All Mail From**

This option allows you to reject any incoming mail from specific addresses. For example, if a user is a troublemaker, you can have ListManager automatically reject any postings from this person.

Note: This mail from: value applies to the SMTP transaction MAIL FROM: <> value. In email messages, this is usually, but not necessarily the same as the From: in the mail you receive. ListManager displays the MAIL FROM: <> value in any message it receives in the Return-Path: header line. Most other mail servers follow this convention as well.

You can use this feature if a user has threatened to mail bomb you and you want to protect your server from them. Mail bombing is the tactic of sending hundreds of messages to someone, in the hopes of overwhelming them, or their server, and wasting their time. If you ban someone's email with this technique, ListManager will not even accept their messages over SMTP, and the amount of processing it does for each message is extremely small, thus defusing the power of their mail bomb.

You can specify as many email addresses as you like, by putting each address on a separate line.

For example:

```
bob_mischief@example.com
jane_trouble@elsewhere.com
```

### **Ban Reload Period**

Large numbers of banned addresses may greatly slow how quickly ListManager may create new members. ListManager can load banned addresses to a cache, which will speed member creation. This setting specifies how many minutes ListManager should wait to reload the banned address cache. The default is 0, meaning ListManager does not cache banned addresses.

The less frequently ListManager reloads the banned address cache, the less impact it will have on member creation. However, a more frequent reload setting may be desirable in situations when banned addresses are added frequently.

### **FCC Domain Name (Text Format) URL**

ListManager may download the list of domains found at the URL listed here. The United States government has specified strict rules regulating sending email to domains used by wireless devices. ListManager may download this list of domains automatically from the URL listed here if the FCC Domains task is scheduled to do so in [Utilities: Administration: Server: Server Settings: Scheduled Tasks](#).

**NOTE** ListManager will NOT download this list of domains to ban unless the FCC Domains scheduled task is enabled. To have these domains banned, you must either Apply Bans in [Members: Ban Addresses](#) or enable the Apply Member Ban Rules scheduled task.

## Utilities: Administration: Server: Server Settings: Security: Web

---

These settings limit who may access the ListManager web interface by TCP/IP address. You may specify, for example, the IP addresses of the computers used by server administrators so others using different IP addresses may not access ListManager as a server admin. If blank, ListManager will not limit access by IP address.

**IMPORTANT** Changes made to this page only take effect after restarting the ListManager web server.

If a user attempts to log in with an IP that is not permitted for that administrative level, they will see a message indicating their IP address is not permitted.

Note that more lenient settings at higher levels do not make lower levels more lenient as well. For example if the TCP/IP for Server Admins is blank (permitting access from any TCP/IP address), but the TCP/IP for List Admins limits access to certain addresses, a list admin must log in from one of the permitted TCP/IP addresses.

If the server admin inadvertently locks out access to the web interface using these settings, the command `reset_tcpip_server_admin` may be run on the command line to reset server admin access. See [Setting Server Options](#) for more information about this command.

### TCP/IP for Discussion Forum Interface

Specifies the TCP/IP addresses that may access the discussion forum interface. If blank, all TCP/IP addresses can access the discussion forum interface; if 0.0.0.0, no one can.

Enter one TCP address or range of addresses per line. Example:

```
192.168.0.1
192.168.0.1-192.168.0.10
```

### TCP/IP for List Admins

Specifies the TCP/IP addresses that may access the list admin interface. If blank, all TCP/IP addresses can access the list admin interface; if 0.0.0.0, no one can.

Enter one TCP address or range of addresses per line. Example:

```
192.168.0.1
192.168.0.1-192.168.0.10
```

### TCP/IP for Site Admins

Specifies the TCP/IP addresses that may access the site admin interface. If blank, all TCP/IP addresses can access the site admin interface; if 0.0.0.0, no one can.

Enter one TCP address or range of addresses per line. Example:

```
192.168.0.1  
192.168.0.1-192.168.0.10
```

If a site TCP/IP address is not approved, the admin can still log in to the next level of admin access they have rights to. For example, if you are a site admin only, you will be completely denied access. If you are a site admin and a list admin, and the site admin access is denied, you will be allowed access as a list admin.

### **TCP/IP for Server Admins**

Specifies the TCP/IP addresses that may access the server admin interface. If blank, all TCP/IP addresses can access the server admin interface; if 0.0.0.0, no one can.

Enter one TCP address or range of addresses per line. Example:

```
192.168.0.1  
192.168.0.1-192.168.0.10
```

If a server TCP/IP address is not approved, the admin can still log in to the highest allowed admin rights permitted to that address. For example, if a server admin's TCP/IP address is allowed for a site admin but not a server admin, that admin would still have site admin rights.

### **TCP/IP for API admins**

Specifies the TCP/IP addresses that may access the API. If blank, all TCP/IP addresses can access the API; if 0.0.0.0, no one can.

Enter one TCP address or range of addresses per line. Example:

```
192.168.0.1  
192.168.0.1-192.168.0.10
```

## **Utilities: Administration: Server: Server Settings: Security: GUI Hosts**

---

### **TCLPORT Hosts**

(required) This setting defines the TCP/IP address of the computers which are allowed to access the Tclport on your server. Tclport is used to generate the web interface, run scripts, and to communicate global bans from a [global ban server](#).

If you are hosting the ListManager web server (httpd-lm.exe) on a separate machine, the IP address of that machine must be listed here. If this ListManager instance is being



used as a global ban server, the IP addresses of the connecting ListManager servers must also be listed here.

Note: If you remove the TCP/IP address of the computer you are using to run the web interface, you will be locked and no longer able to access the web interface.

Also, if you copy the web interface programs to another web server, the ListManager will not allow that web server to access it until that machine is added to the list of Tclport Hosts. You will receive an error from the ListManager Web Interface on that computer. See [Installing the Web Server on Another Machine](#).

If you do this, you will need to shutdown your ListManager and run the command: *lm tclport tcp/ip-address*. This will add the specified tcp/ip-address to the list of Tclport hosts. For example:

```
lm tclport 207.105.6.2
```

When first installing ListManager, the TCP/IP address of the machine running the ListManager is added to the list of Tclport hosts. If you are running the ListManager Web Interface on another computer, you can remove this setting.

## Utilities: Administration: Server: Server Settings: Security: Spam Blocking

---

ListManager email addresses (such as join and list addresses) may be spammed like any other email address. These settings allow you to evaluate email being received by the ListManager server to determine whether it is legitimate or spam.

### **SPF**

#### **SPF level**

ListManager can use [SPF](#) (Sender Policy Framework) to check incoming messages for spam. ListManager can examine the MAIL FROM: header during the SMTP transaction (or the HELO string if there is no From: header) and perform a DNS lookup on the domain to see if the computer sending the message is approved.

More information about SPF checks may be found at <http://spf.pobox.com/>; the RFC proposals for this standard may be found at <http://spf.pobox.com/draft-mengwong-spf-01.txt>.

The following SPF levels are available:

#### **Off (default)**

No SPF checking is performed.

### **Add Received-SPF header**

ListManager checks incoming mail against SPF rules, and adds a Received-SPF: header to the message visible in [Mailings: Mailing Status: Mail Queues: Mail Queue -- Incoming](#). Example:

```
Received-SPF: pass (mail.example.com [192.168.0.4]
<joebob@example.com>)
```

### **Temporary Error from DNS**

If an error is received while evaluating DNS information for SPF, ListManager rejects the message with a 450 message (transient error) and disconnects. The connecting mail server may then retry the message later.

### **Reject on FAIL**

Rejects messages that fail the SPF check. These messages will not appear in [Mailings: Mailing Status: Mail Queues: Mail Queue -- Incoming](#), but a record of the rejection will be available in [Utilities: Administration: Server: Debug Logs](#) if the incoming trace option is selected.

### **Reject on SOFTFAIL**

In addition to rejecting messages that FAIL, also rejects messages that SOFTFAIL the SPF check. The SOFTFAIL status is for messages that the DNS record can not confidently identify as a forgery.

These messages will not appear in [Mailings: Mailing Status: Mail Queues: Mail Queue -- Incoming](#), but a record of the rejection will be available in [Utilities: Administration: Server: Debug Logs](#) if the incoming trace option is selected. This option is not recommended, but available for ListManager administrators who want to only accept mail that pass SPF rules.

### **Reject on NEUTRAL**

In addition to rejecting on FAIL and SOFTFAIL, also rejects messages that are NEUTRAL from the SPF check. The NEUTRAL status is for domains that specify a neutral value, or for checks that cannot pass or fail the SPF check.

These messages will not appear in [Mailings: Mailing Status: Mail Queues: Mail Queue -- Incoming](#), but a record of the rejection will be available in [Utilities: Administration: Server: Debug Logs](#) if the TRACE option is selected. This option is not recommended, but available for ListManager administrators who want to only accept mail that pass SPF rules.

## **Enable blocking-mode SPF**

Specifies whether ListManager should wait until SPF processing is completed before accepting or rejecting mail. By default, this setting is set to "no", meaning ListManager will wait at most 30 seconds for SPF results. If this length of time has passed and no SPF results have been returned, it will accept the current message but will use the SPF results returned (and cached) for future messages.

If set to "yes", ListManager will wait until SPF results have been returned before proceeding with further processing of the message. Incoming mail processing may be slowed by SPF checks, and some connecting mail servers may disconnect during the SMTP transaction if no response is given for a long time.

## **SPF Allowed IPs**

The list of IP addresses that will automatically pass. In some environments, internal mail from MX backups or relay systems may fail the SPF test. This setting allows

administrators to specify IP addresses that will automatically pass SPF. Enter single IP addresses, or IP address ranges. Example:

```
192.68.0.1  
10.0.0.1-10.0.0.6
```

## Join and Leave Mail

### Check Join and Leave Mail for Spam

Specifies whether ListManager should check join and leave mail for lengthy messages characteristic of spam. By default, this setting is **yes**.

Typically, such messages are quite short--one or two lines. However, some email clients may add additional formatting, or users may have a long signature for their messages.

Keep in mind that while set to **yes**, join requests may be rejected based on the number of body lines set.

When a message is rejected, an error message will be sent to the sender informing them that the email is too long, with instructions on what to do. Included in this message will be the following:

```
Diagnostic-Code: smtp;554 mail sent to subscribe address is too  
long - looks like spam!  
Send a blank email to subscribe (no long signatures!).
```

### Max Join and Leave Mail Body Lines (Text Messages)

Sets the maximum number of plain-text lines permitted in the body of a join or leave request email.

The default number of text lines is 6. If set to "Yes" above, emails to the subscribe address with more than 6 text lines will be rejected. Note that this is a very conservative number; remember that email signatures sometimes add lines.

### Max Join and Leave Mail Body Lines (HTML Messages)

Sets the maximum number of HTML lines permitted in the body of a join or leave request email.

The default number of HTML lines is 16. If **Check join and leave mail for spam** is set to "Yes" above, subscription emails with more than 16 HTML lines will be rejected. Note that this is a very conservative number; remember that email signatures sometimes add lines.

Also note that if any HTML is detected in the message, each line is scanned for "<a href" to see if there are any image tags. No join or leave request should include image tags, so if one is found, the message is immediately marked as being spam.

## Command Mail

### Check Command Mail for Spam

Specifies whether ListManager should check command mail for lengthy messages characteristic of spam. By default, this setting is **yes**.

Keep in mind that while set to **yes**, command mail may be rejected based on the number of body lines set.

When a message is rejected, an error message will be sent to the sender informing them that the email is too long, with instructions on what to do. Included in this message will be the following:

```
Diagnostic-Code: smtp;554 mail sent to subscribe address is too
long - looks like spam!
Send a blank email to subscribe (no long signatures!).
```

### **Max Command Mail Body Lines (Text Messages)**

Sets the maximum number of plain-text lines permitted in the body of a command email.

The default number of text lines is 6. If set to "Yes" above, emails to the subscribe address with more than 6 text lines will be rejected. Note that this is a very conservative number; remember that email signatures sometimes add lines.

### **Max Join and Leave Mail Body Lines (HTML Messages)**

Sets the maximum number of HTML lines permitted in the body of a command email.

The default number of HTML lines is 16. If **Check command mail for spam** is set to "Yes" above, subscription emails with more than 16 HTML lines will be rejected. Note that this is a very conservative number; remember that email signatures sometimes add lines.

Also note that if any HTML is detected in the message, each line is scanned for "<a href" to see if there are any image tags. No command email should include image tags, so if one is found, the message is immediately marked as being spam.

### **Name Match**

#### **Allow Name Match**

This is a server-wide setting, enabled "Yes", or disabled "No" here. This allows or rejects the ability to post messages to the list based on recognition of the member name (rather than the email address). For smaller lists it is OK to allow name matching, but for larger lists, it is advised to leave this set to "No". This default for this feature is set to off, or "No".

## **Sessions**

---

To accommodate the increasing requirements for login security, ListManager has switched to a form-based login in order to enable true login sessions. The previous HTTP Authentication method provided no mechanism for truly logging out; the current version allows server administrators to set time-out periods which require users who have been idle for a sufficiently long time to sign-in

again in order to re-authenticate. Additionally, users can be forced to re-authenticate when their sessions expire.

### **Session Logins Enabled**

By default this is set to **yes**, which is the preferred setting. Selecting **no** causes ListManager to use "basic" authentication, which was the authentication used in version prior to 10.0.

### **Session Idle Timeout (minutes)**

The amount of time you can go without clicking something in ListManager before your session times out, requiring you to log in again.

### **Session Max Lifetime (minutes)**

The maximum length of a session, in minutes. This setting can prevent someone who "steals" your session cookie from having long-term access using that cookie; therefore, when choosing a maximum session length, your goal should be a time period that is comfortably long enough for you while not being so overly long that it diminishes security.

### **Session Login URL**

The URL to the web page/form that processes your login. The default should be sufficient; however, you can change it if you want to customize the look and feel of the login page.

### **SSL Disabled Warning**

If the server has SSL disabled, this is the message that is shown on the login screen as a warning to users that their login is not secure/protected.. This is optional; by default, there is no message.

## **Automatic Maintenance**

# **Utilities: Administration: Server: Server Settings: Automatic Maintenance: Error Mail**

---

### **Bounce Handling**

This option sets whether permanent failures are handled in memory, which may be faster, or if they are saved in the incoming mail database, and processed there.

When a message mailing is sent out to its recipients, some of the receiving mail servers will initially accept the messages but then send a notice back saying the recipient could not receive the message. ListManager automatically tracks these messages, and determines when an email address has become invalid.

### **Settings:**

**Keep bounce messages to research user issues**

ListManager will process these bounce messages in the [incoming mail queue](#), and this data will be available when viewing the attempted mail history for individual members. **NOTE** We recommend that you choose this setting; as a result of the new [Deliverability](#) feature, this will allow you to see information about bounces in member history and view complaints in the Complaints reports.

### **Don't keep the bounce message text**

ListManager will still process the error mail, but will not record the reason, making processing these messages faster and more efficient.

### **Auto-Hold Users**

If set to "No", each list may specify whether or not it will put members that bounce too much mail in [Utilities: List Settings: Automatic Maintenance: Error Mail: Hold Users](#). If set to "Yes", Hold Users will be disabled for every list on the server. You might want to disable holding members if your server is having network connectivity problems. You may set individual members to never be put on hold regardless of delivery problems in [Members: View Members: Edit Member: Advanced Settings: Hold User](#).

### **Disable From: Checking**

When set to "No" ListManager checks the From: field of incoming mail for spam and error messages using a list of regular expressions. To disable From: checking, set to "Yes".

For example, a message from postmaster@somedomain would normally be blocked, because postmaster@ is an automated address that usually sends delivery errors. However, a real person might use their postmaster@ account to belong a ListManager list and you might want to allow this.

These are the regular expressions ListManager looks for in the From: field, if From: checking is not disabled:

```
"\\|POST.*MASTER"  
"\\|WPUSER"  
"\\|$EMD"  
"\\|VMMAIL"  
"\\|MAIL.*SYSTEM"  
"\\|MAISER"  
"\\|MAIL.+AGENT"  
"\\|MAIL.+DAEMON"  
"\\|TCPMAIL"  
"\\|BITMAIL"  
"\\|MAILMAN"  
"\\|^LISTMAN"  
"\\|^LISTSERV"  
"\\|^MAJORDOMO"  
"\\|^LISTPROC"  
"\\|^SERVER"  
"\\|^LYRIS$"  
"\\|^CRENLIST"
```

### **Disable Subject: Checking**

When set to "No" ListManager checks the Subject: field of incoming mail for spam and error messages using a list of regular expressions. To disable Subject: checking, set to "Yes".

For example, ListManager normally blocks messages with a subject line of "out of office". Messages with that subject are typically auto-responder members, which inform people that they will not be able to answer their email in a timely manner. Blocking messages of that type prevents useless messages from going out to the list and prevent mail loops.

These are the regular expressions ListManager looks for in the subject, if subject checking is not disabled:

```
"DELIVERY.*ERROR"  
"\\|DELIVERY.*REPORT"  
"\\|DELIVERY.*PROBLEM"  
"\\|WARNING.*FROM.*UUCP"  
"\\|USER.*UNKNOWN"  
"\\|UNDELIV.*MAIL "  
"\\|UNDELIV.*MESS"  
"\\|PROBLEM.*DELIVER.*MAIL "  
"\\|PROBLEM.*DELIVER.*MESS"  
"\\|CAN.*DELIV.*MAIL "  
"\\|UNABLE.*DELIV.*MAIL "  
"\\|UNABLE.*DELIV.*MESS"  
"\\|MAIL.*DELIV"  
"\\|MESS.*DELIV"  
"\\|FAIL.*MAIL "  
"\\|FAIL.*MESS"  
"\\|MAIL.*FAIL "  
"\\|MAIL.*RETURN"  
"\\|RETURN.*MAIL "  
"\\|MAIL.*ERROR"  
"\\|MAIL.*RECEIV"  
"\\|MESS.*RECEIV"  
"\\|MESS.*DELIV"  
"\\|MAIL.*DELIV"  
"\\|INTERCEPT.*MAIL "  
"\\|WAITING.*MAIL "  
"\\|READ.*RECEIPT"  
"\\|RECEIPT.*NOTIFIC"  
"\\|STATUS.*SIGNAL"  
"\\|ERROR.*CONDITION"  
"\\|NO.*REQUEST.*FOUND"  
"\\|AUTO.*REPLY"  
"\\|AUTO.*GENERAT"  
"\\|AUTO.*ANSWER"  
"\\|WAITING.*MAIL "  
"\\|. *ON.*VACATION"  
"\\|VIA.*VACATION"  
"\\|CONCIERGE.*NOTICE"  
"\\|AWAY.*FROM.*MAIL "  
"\\|CAN.*ANSWER"  
"\\|CAN.*REPLY"  
"\\|OUT.*OFFICE"
```

```
"\\MESSAGE.*CONFIRMATION"  
"\\ABWESENHEITSNOTIZ" // german vacation notification  
"\\RECEIPT OF.*MESSAGE"  
"\\OUT.*TOWN"
```

### **Disable First Line Checking**

When set to "No" ListManager checks the subject and body of incoming mail for command and unsubscribe requests using a list of regular expressions. To disable first line checking, set to "Yes".

For example, a message sentence starting with "please remove" would normally be blocked, because it looks like an unsubscribe request sent to the list.

These are the regular expressions ListManager looks for in the first line, if first line checking is enabled:

```
"^[ \r\n\t]*LOGIN"  
"^[ \r\n\t]*LOGON"  
"^[ \r\n\t]*DELETE"  
"^[ \r\n\t]*UNSUBSCRIBE"  
"^[ \r\n\t]*REMOVE"  
"^[ \r\n\t]*PLEASE REMOVE"  
"^[ \r\n\t]*PLEASE DELETE"  
"^[ \r\n\t]*PLEASE UNSUBSCRIBE";
```

## **Utilities: Administration: Server: Server Settings: Automatic Maintenance: Logging**

---

### **Enable Logging**

By default, every message posting to a list causes an entry to be written to the ListManager [log](#). Nightly digest and index mailings are also recorded. This information is useful for tracking the overall usage of a ListManager server, and also for billing purposes.

If you have no need for this logging information, you can disable this feature, and you will save a little bit of disk space which is used for the ListManager log database table.

## **Utilities: Administration: Server: Server Settings: Automatic Maintenance: Purging Old Data**

---

### **Clean Outgoing Mail Queue**

This setting determines how long completed mail messages (i.e., welcome messages and other one time messages) will remain in [Mailings: Mailing Status: Mail Queues: Outgoing](#). The outgoing mail queue will display this number of days' worth of completed outgoing mail messages. Older mail will be deleted from the database.



Choosing "0" will result in all outbound messages being shown and saved by ListManager. This setting is not recommended, however, as the database table will just continue to grow and grow, and the SQL server processing requests for your ListManager installation will get slower and slower.

The length of time ListManager saves mailings sent to lists is configured in [Utilities: List Settings: Automatic Maintenance: Purging Archives](#).

### **Clean Incoming Mail Queue**

This setting determines how long completed incoming mail messages will remain in [Mailings: Mailing Status: Mail Queues: Incoming](#). The incoming mail queue will display this number of days' worth of completed incoming mail messages. Older mail will be deleted from the database.

Choosing "0" will result in all messages being shown and saved by ListManager. This setting is not recommended, however, as the database table will just continue to grow and grow, and the SQL server processing requests for your ListManager installation will get slower and slower.

### **Purge Old Metric Events**

This setting determines how many days performance data about ListManager is kept. By default, this setting is "0", meaning metric events will be kept indefinitely.

### **Purge Old Web Access Log Entries**

This setting determines how many days [admin web access logs](#) are kept. By default, this setting is "0", meaning these logs will be kept indefinitely.

## **Utilities: Administration: Server: Server Settings: Automatic Maintenance: Mail Loops**

---

### **Loop Detection**

ListManager automatically tracks how many messages per day are sent from a foreign address to a ListManager address. If the number of messages in one day exceeds the Loop Detection threshold, ListManager cuts off the mailings, issuing a single refusal message, and then discarding the rest of the messages in that 24 hour period.

This feature is useful for automatically breaking mail loops that aren't able to be stopped through ListManager's other mechanism, and also for stopping a mail bomb attack. Say, for example, that someone sets their email program to send thousands of messages to your auto-responder, in order to mail bomb you, and tie up your server. This feature will detect this, notify the administrator and automatically stop the process.

Note: Some sites use a web CGI script to sign people up to their list. In such a case, the script might be sending from the same address every time, and to the same address every time, thus being perceived as a mail loop if the quantity of mailings goes over the loop detection threshold. In such a case, you should put an exception for that specific from/to combination to exempt your script from this logic. If you forget to do this, the

server admin will receive notification of the potential loop, and you'll thus be reminded of the need for an exception.

### Loop Exceptions

The Loop Detection feature in ListManager keeps track of how many messages From: one person have gone to each To: address, and sets a limit on the daily number. However, you might want to specify exceptions to this feature, which you can do using this "Loop Exception" field.

For example, if you have a script which generates many commands from the same email address each day, you can put an exception in for your script, and still retain tight control over breaking mail loops. To use this feature, specify either the to sender or the recipient address, or specify a sender/recipient email address combination by putting the "sender-recipient" together on a line, separated by a dash. You can specify as many exceptions as you like each on a separate line.

For example, to put an exception for all mail from root@mail.yourcorp.com you would enter this:

```
root@mail.yourcorp.com
```

To put an exception in for a local auto-responder named "sales@mycompany.com" you would put in:

```
sales@mycompany.com
```

And if you wanted to put an exception in for only the messages from root@mail.yourcorp.com to a local auto-responder named "sales@mycompany.com" you would put in:

```
root@mail.yourcorp.com-sales@mycompany.com
```

Note: If a loop is detected, ListManager will send the server administrator an email notification of the loop. The email notification will contain the From and To information for that message, as well as the instructions for putting an exception for that loop, if so desired.

### Scheduled Tasks

## Utilities: Administration: Server: Server Settings: Scheduled Tasks

---

ListManager performs certain tasks such as sending out digests or cleaning the database of old posts automatically at preset times.

By default, database intensive tasks (such as deleting old data) are scheduled for various times in the middle of the night. Other tasks, such as notifying you that your database is reaching capacity, are scheduled during the day.

These tasks may be rescheduled here to occur at different intervals or at different times of the day, or to not occur at all. For example, by changing the time and frequency of scheduled tasks, you may schedule digests to be sent more than once a day, or at a different time of day.

There is no default time and frequency for the "Apply member ban rules" task. This task sets members who [match ban rules](#) to be unsubscribed.

You may not add or delete scheduled tasks. If you do not want a scheduled task to occur, erase the time when the task is supposed to be performed.

Installations using Microsoft SQL or MSDE for its database will have a "DB Maintenance" scheduled task available. This task is disabled by default, but should be enabled by users who have not otherwise implemented database maintenance to reindex and defragment the database. Note: Lyris Technologies does not provide technical support for installation, use or maintenance of MS SQL or Oracle.

Click restore defaults to restore the default scheduled task times and frequency to all scheduled tasks. Click *edit* next to a task to edit it.

## Task

The name of the task. The name may not be edited.

## Description

A description of the task. The description may not be edited.

## Next Run Time

If enabled, the next time the scheduled task is scheduled to run. Specifying a different run time will cause the scheduled task to run at that time of day at the frequency you specify in Frequency. Enter the next run time in yyyy-mm-dd hh:mm:ss format.

Example:

```
2004-06-30 13:01:01
```

If you not want this task to run, select Disable.

## Previous Start Time

The time this task last started, if it has run in the past. If the task was scheduled to run and did not, it is possible that it is interfering with another task (e.g., server down time).

## Previous End Time

The time this task last ended, if it has run in the past. A long period of time between the task start and end times may indicate task conflicts.

## Frequency

How frequently the task will be run. By default, most scheduled tasks occur once a day. You may select a different frequency here. The frequency selected here will cause the run time to be updated appropriately. For example, if you set the run time to be 13:01:01, and select the frequency to be every 12 hours, the run time will be automatically updated so that the task will be performed at 13:01:01 and at 01:01:01 each day.

Advanced

## Utilities: Administration: Server: Server Settings: Advanced: Message Wrapping

---

**Important note for users of earlier versions of ListManager:** The list, site or server message wrapping will not be automatically included in your message if you create it through the ListManager administrator GUI. Please remember to add these instructions to your content or mailing, or send the message to the list via email. See [Content: Insert Field: Unsubscribe](#) to see how to do so quickly and easily.

### **Prepend at Beginning of Every Message on This Server (Text Message Header):**

This setting allows you to define a header that will be applied to all messages on the server. This header will appear at the top of the message, before the site header and list header. Every message that passes through a list on your ListManager server will have this header tacked on.

In addition, the header will get properly inserted inside your HTML or MIME-encoded message, because ListManager is aware of which type of message you are trying to send.

### **Append to End of Every Message on This Server (Text Message Footer):**

This setting allows you to define a footer that will be applied to all messages on the server. This footer will appear at the very bottom of the message, after the list footer and the site footer. Every message that passes through a list on your ListManager server will have this footer tacked on.

In addition, the footer will get properly inserted inside your HTML or MIME-encoded message, because ListManager is aware of which type of message you are trying to send.

### **Prepend at Beginning of Every HTML Message on This Server (HTML Message Header):**

In the HTML Editor provided, you can create a header that will be applied to all HTML messages on the server.

### **Append to End of Every HTML Message on This Server (HTML Message Footer):**

In the HTML editor provided, you can create a footer that will be applied to all HTML messages on the server.

### **Disable HTML Editor**

Click this button to switch from WYSIWYG mode to HTML mode.

## Utilities: Administration: Server: Server Settings: Advanced: Digest Wrapping

---

### **Prepend at Beginning of Every Digest on This Server**

This setting allows you to define a header that will be applied to all digests on the server. This header will appear at the top of the digest, before the site digest header and list digest header. Every digest that passes through a list on your ListManager server will have this header tacked on.

In addition, the header will get properly inserted inside your HTML or MIME-encoded digest, because ListManager is aware of which type of message you are trying to send.

---

### **Append to End of Every Digest on This Server**

This setting allows you to define a footer that will be applied to all digests on the server. This footer will appear at the very bottom of the digest, after the list footer and the site footer. Every digest that passes through a list on your ListManager server will have this footer tacked on.

In addition, the footer will get properly inserted inside your HTML or MIME-encoded digest, because ListManager is aware of which type of message you are trying to send.

## Utilities: Administration: Server: Server Settings: Advanced: For Programmers

---

### **Run Program Before Listmanager@**

This setting allows you extend ListManager command processing with your own program. When mail is sent to listmanager@... your program will first be run and then your program can do any processing it wishes on the message. If your program wants to stop processing of the message, it can delete it.

### **Run Program After Listmanager@**

This setting allows you extend ListManager command processing with your own program. When mail is sent to listmanager@... the message will be processed and then your program can do any additional processing it wishes on the message.

### **Run Extensions**

This option allows you turn off the programming "Extensions" feature of ListManager. The fields for "run program before" and "run program after" will continue to appear in the web interface, but they will have no effect. By default, extensions are disabled.

Some administrators prefer to not allow extensions on their server, in order to enhance security.

### **Extension Directory**

This option allows you to define the directory where all the ListManager extensions are located. This adds a level of security to extensions, as it prevents ListManager from running any program on your computer—only programs in this directory are allowed.

### **Email Scripting Initialization**

If specified, the script that will be called when a Tcl interpreter is created for a mailing.

These scripts are useful for setting up proxy settings for httpget or setting global variables.

These scripts are called in the order Server, Site, and List when a Tcl interpreter is created for a mailing. If no interpreter is required for the mailing, these scripts will not be run.

If your message requires these scripts to be run and you are not using TclMerge in your message (i.e., no Tcl scripting is used in your message), you may add the following to your message to cause the interpreter to be instantiated.

```
%%init ; return "%%"
```

To set a proxy server, the following lines may be added:

```
package require http 2.3  
http::config -proxyhost (proxy ip address) -proxypor
```

## **Utilities: Administration: Server: Server Settings: Advanced: Billing**

---

For more information, see [Billing](#).

### **Billing Admin Email**

The address used as the default From: for bills.

### **Billing Test Email**

The address used for testing your billing.

### **Billing Admin Name**

The name used in the default From: for bills.

### **Customer Type Options**

The customer type options available for billing. See [Creating and Editing Customers](#) for more information.

## Utilities: Administration: Server: Server Settings: Advanced: Enable Features

---

### Enable newsgroups

ListManager is able to act as a secure, private Newsgroup server, so that the mailing lists being run on your ListManager are also available via a news browser program, such as Netscape News, Agent, "rn", or Internet Explorer.

If you do not want this capability, you can disable it server-wide with this option, or it can be disabled on a list by list basis. For more information about newsgroup support in ListManager, see [Usenet Newsgroups](#).

### Show all lists

By default, this setting is set to "No, When Message Reading, Only Show the Lists for the Current Site." When members go to view all lists in the discussion forum interface, they see only the lists for the site they are logged into. To have all lists displayed, change this setting to "Yes, When Message Reading, Show All Lists for All Sites."

### Enable legends in reports

This is a server-wide option for turning on the legends feature in reports. The default is set to "Yes". When legends are enabled, reports will display a legend describing the meaning of each color (line, bar, etc.) and a description. For instance, in the Send success & failure report, the legend shows one color for "failed mailing attempts" and another for "successful mails sent", with a brief description of what these mean. If legends are not enabled, the chart will say "unknown" or "undefined" in place of the description.

Note that for each chart, a legend can be viewed even if this server-wide setting is set to "No" by clicking the "?" beneath each chart.

### Enable content internationalization

If you are going to be using any international characters when creating content, a server administrator must enable this feature here in order for the Internationalization feature to appear and function properly.

If content internationalization is not enabled, the Internationalization tabs will not appear in the Contents and Mailings sections. See [Content: New Content: Internationalization](#) and [Mailings: New Mailing: Internationalization](#) for more information.

If this feature is not enabled, the default is the ISO-8859-1 character set and quoted-printable encoding.

### Make long home page queries optional

Some of the reports available on the home page may take a long time to be displayed. When set to "yes", this setting prevents these reports from being generated automatically when visiting the home page, which allows the home page to be displayed much more quickly. The individual reports may be generated if desired by clicking the appropriate buttons.

### **Default language**

Select the default language for the server from the drop-down menu (if nothing is set, English is the default). This sets the language that the ListManager interface will be in. To have other languages available for the web interface, you must run the command line function `dbimporttranslations` to import the translations. By default, they are not installed when installing or upgrading ListManager because they take a long time to import and can affect the performance of the web interface.

### **EmailAdvisor Image URL**

([Rebrandable](#) license only) Replaces the image used for the EmailAdvisor signup screen. By default, this setting is blank, and ListManager displays a promotional logo. Enter the full path of the image to be displayed.

### **EmailAdvisor Email**

([Rebrandable](#) license only) Specifies the email address users should use to find out more about the EmailAdvisor service. By default, this setting is blank; requests for information about this service are routed to the Lyris web site.

### **EmailAdvisor Telephone**

([Rebrandable](#) license only) Specifies the phone number users should call to find out more about the EmailAdvisor service. By default, this setting is blank; requests for information about this service are routed to the Lyris web site.

### **Use Real Recipient Address When Merging Test Messages**

When sending a test mailing, ListManager will by default merge all information into the test message for a random list member, including the To: header if the `%%nameemail%%` mail merge tag is used.

In some cases, these messages are filtered as spam because the (SMTP envelope) RCPT TO: and (Header) To: are not the same.

By default, this setting is set to "no," meaning the To: field will display the email address of the list member being sampled, not the email address specified to receive the test message (as specified in the "Send test to" field in the Test Mailing form).

To change the To: header to be that of the user receiving the test message, not the member being sampled, this setting should be changed to "yes." The following fields will then show the email address of the person getting a copy of the test message, not the sampled list member:

```
%%recip.hdrto%%  
%%recip.smtpmessageid%%  
%%emailaddr%%  
%%nameemail%%  
%%rcptto%%
```



## Utilities: Administration: Server: Server Settings: Advanced: Global Ban Settings

---

The Global Ban Settings let ListManager download [member bans](#) from the ListManager global ban server designated here. This feature allows a hosting company with multiple ListManager servers to ban members across all servers by adding a server-level member ban on a single server designated as the global ban server, and then pointing other servers to it.

The server level bans from the global ban server are *added* to the local server's ban information. Therefore, all list, site, and server bans are kept on the local machine, but additional server bans will be loaded from the server-wide settings of the global ban server. List and site bans will not be added from the global ban server.

An empty Server Address indicates that no global ban server is available, or that this ListManager installation is the global ban server to be used by other ListManager installations.

Specify which IP address this ListManager installation should use to connect to the global ban server in [Utilities: Administration: Server: Server Settings: Machine/Node Settings: IP Addresses](#).

**Note:** In order for global ban settings to function properly, all the servers which may receive mail from banned members must be entered as GUI hosts on the global ban server. Please see [Utilities: Administration: Server: Server Settings: Security: GUI Hosts](#) for more information.

### Server Address

Enter the IP address of the ListManager server which hosts the global list of server member bans. Example:

```
192.58.0.1
```

If no IP address is set here, ListManager will not connect to an external global ban server and will use its local member bans only.

You may also need to specify which IP address the local ListManager instance should use to connect to the global ban server in [Utilities: Administration: Server: Server Settings: Machine/Node Settings: IP Addresses](#).

### TclPort Port

The port ListManager should use to connect to the global ban server. ListManager will default to the standard port used by the server, which is "2021". This port is used to communicate with the web interface and with other programs. **Generally, this setting should not be changed.** This setting should be the same as the remote global ban server setting in [Utilities: Administration: Server: Server Settings: Network Settings: Ports](#).

## TclPort Password

The password that ListManager should use when connecting to the global ban server. Access to the Command Protocol is password protected, so that outsiders cannot affect your server. ListManager will default to the standard password, which is "TCLPORTPasswd". **Generally, this setting should not be changed.**

## Operational Statistics

# Utilities: Administration: Server: Operational Statistics: License Capabilities

---

This page tells you the capabilities of your ListManager server or this node, as determined by your ListManager license. If you have recently purchased a license upgrade, you can refresh your license capabilities view by clicking "refresh this page" at the top of this page. You may need to restart ListManager and the ListManager web server for the new capabilities to take effect.

If you would like to upgrade your license, please contact your account representative at 800-768-2929, email [sales@lyris.com](mailto:sales@lyris.com), or click "contact your salesperson" at the top of the page.

### Clear Activation

Click this button to clear ListManager's activation code. You may need to clear and get the activation code if you have moved ListManager or if you have changed your ListManager license.

### Get Activation

Click this button to get ListManager's activation code.

## Server Level Limits

---

### Serial Code

Your ListManager serial code.

### Activation Code

The activation code of ListManager. When your serial number is activated, this code is generated. It determines the capabilities of your ListManager server.

### Expiration Date

If a time-limited license, the date the license expires.

**Is Rebrandable**

Indicates whether all references to ListManager may be removed from this server.

**Max Version**

Indicates the maximum version number of ListManager that this server is allowed to upgrade to. This is determined at the time of the sale and is dependent upon the support package purchased.

**Last Day to Upgrade**

Indicates the final date, in YYYY/MM/DD format, that this server is allowed to upgrade to higher versions of ListManager. This is determined at the time of the sale and is dependent upon the support package purchased.

**Hardware ID**

Displays the internal server number used by Lyris to identify your server.

**Max Instances**

The number of instances of ListManager that can be run on this server.

**Max Click Servers**

The number of [remote web servers](#) allowed to track clicking activity.

**Is Date Restricted**

Whether or not this license is date restricted.

**Allow Clustering****Allow Foreign Member Table**

Whether or not a [foreign member table](#) (deprecated) may be used on this server.

**Allow Billing**

Whether the [billing](#) feature may be used on this server.

**Allow Pro Charting**

Whether charts are visible on this server.

**Allow Detect HTML**

Whether the feature to detect recipient's ability to see HTML messages may be used on this server.

**Allow Detect Opens**

Whether this server is allowed to detect opening of messages.

**Allow Clickthrough**

Whether this server is allowed to track trackable URLs.

### **Allow Clickstream**

Whether this server is allowed to track clickstreams.

### **Allow Referral Tracking**

Whether the [Referral tracking](#) feature is available on this server.

### **Allow SSL**

Whether this server allows [SSL \(Secure Sockets Layer\)](#), to manage the security of your web server.

### **Allow Surveys**

Whether this server allows [survey forms](#), to poll users.

### **Allow Granular Permissions**

Whether or not this server allows the creation of [permission groups](#) for added security.

### **Allow Campaigns**

### **Purchase Tracking**

Whether this server is allowed to track purchases.

### **Interest Tracking**

Whether this server is allowed to track interest points and interest events.

### **Triggered Mailings**

Whether this server is allowed to create [triggered mailings](#).

### **Sequential Mailings**

Whether this server is allowed to create [sequential mailings](#).

### **Split Test Mailings**

### **Other Enterprise Features**

Any other Enterprise level features allowed by this server.

### **Other Enterprise Reports**

Any other Enterprise level reports allowed by this server.

## **Mail Engine Limits**

---

### **Max SMTP Connections**

The maximum number of messages that can be sent simultaneously (simultaneous sends).

### **Max Messages Per Hour**

The maximum number of messages that ListManager may send an hour as determined by your activation code. Your actual speeds may vary depending on your bandwidth, DNS server, list quality and other factors.

## **List and Site Limits**

---

### **Maximum Members**

The maximum number of members allowed for the entire server. If you exceed this number, your ListManager server will be disabled.

### **Current Total Members**

The current number of total members on this server.

### **Max Sites**

The maximum number of [sites](#) allowed.

### **Subsets Available**

Whether this server is allowed to send messages to [segments](#), as opposed to the entire list.

### **Conditional Content Available**

Whether this server is permitted to use [conditional content](#) and [advanced scripting](#).

### **Mailing Merge/Purge Available**

Indicates whether or not lists may be [merged](#) or earlier postings may be [purged](#) on this server.

### **MultiView NNTP Available**

Indicates whether or not the [MultiView feature](#) is enabled on this server.

### **Databases Supported**

The databases your license allows you to use.

### **Current Database Used**

Which type of database you are currently using.

# Utilities: Administration: Server: Operational Statistics: General Statistics

---

The General Statistics page gives you information about your ListManager server's performance or this node, and a picture of what it is doing at any one time.

## Terms Used in Server General Statistics

---

### Protocol

A method of communication that has certain rules. Almost like a human language, it is the way data is formatted and presented that only makes sense to a computer program if it is expecting that protocol. This is just like human language in that we may immediately understand another person if he/she is speaking a language we know, but we have no idea if the language is different, even if both languages are trying to communicate the same ideas.

### SMTP

SMTP stands for Simple Mail Transfer Protocol. This protocol regulates how mail servers talk to each other to send mail.

### Thread

A thread is a method by which independent tasks are executed at the 'same' time by quickly alternating between them. Using threads allows a system with just one 'brain' (the CPU) to act as if is doing many things at once, but in fact, it is doing a little bit of each task and then switching to the next task. However, this is done so quickly that it appears the system is working on many things at the same time. As an example of the human body, you could say that there is a thread running your heart, one for breathing, and others for digestion and other bodily functions. Each of these things is happening at the same time, and could be considered similar to threads.

### Socket

A connection to another computer. It is similar to placing a phone call. When you dial you are attempting to connect, and once the connection succeeds, a 'socket' is established. If the receiving end refuses the connection or is too busy (gives you the busy signal), then the socket is not established.

### TCP

TCP stands for Transmission Control Protocol, which is the way most data is actually packaged and formatted through the Internet.

### NNTP

NNTP stands for Network News Transport Protocol. It is used if you are using the MultiView option to allow users to read postings using a newsreader.

### TCLPORT

TCLPORT is the means by which the current ListManager web interface is generated.

## **Statistics Information**

---

### **Lyris List Manager Version**

The program name and some version identification information.

### **Server Date and Time**

Displays the current time and date on server.

### **Total Incoming Mail Threads**

The number of system threads working on incoming mail processing.

### **Total Incoming Connections NNTP**

The total number of incoming connections receiving data using the NNTP protocol.

### **Total Physical Memory**

The total amount of physical RAM available on the machine.

### **Physical Available**

The amount of physical RAM memory available.

### **Available File Descriptors**

Only visible for Linux users/OS resources. This tells you how many descriptors are available for ListManager to use at the time.

### **Serial Number is Date Restricted**

Specifies whether the serial number for this instance of ListManager is limited by date.

### **Multiview Option Enabled**

Specifies whether users can use NNTP to access lists on ListManager.

### **Total Incoming SMTP Connections**

The total number of incoming connections received using the SMTP protocol.

### **Total Incoming TCLPORT Connections**

The total number of connections to process web interface or clicking requests. The number of incoming connections for NNTP, SMTP, and TclPort (web interface).

### **Total SMTP Connections in Progress**

The number of connections to SMTP servers that the program is attempting. This is the total that the system would like to have in progress, but doesn't count those that are currently waiting for DNS information or waiting for a connection, for example.

### **Mail for List Owners, listname-owner@**

The number of messages sent to the listname-owner@ address, since ListManager was started.

**Mail Sent to an Autoresponder, autoresponder@**

The number of messages sent to an autoresponder address, since ListManager was started.

**Mail Sent to an Error Mail Address, Processed in Database**

The number of messages sent to an error mail address address, since ListManager was started, and processed and recorded in the database.

**Mail Sent to an Error Mail Address, Processed in Memory**

The number of messages sent to an error mail address address, since ListManager was started, and processed in memory.

**Mailing List Postings, listname@**

The number of list postings sent since ListManager was started.

**Processing listmanager@ Mail**

The number of messages processed to the listmanager@ address since ListManager was started.

**Subscription Confirmations**

The number of subscription confirmations processed since ListManager was started.

**Unsubscribe Confirmations**

The number of unsubscribe confirmations processed since ListManager was started.

**Total Incoming Messages Processed (all types)**

The number of messages received and processed by this server from all IP's.

**Status of Currently Processing Incoming Messages**

Displays the various statuses of messages currently being processed by the server.

**SQL Stats**

---

**Current Connections in Use**

The connections to the database server that are currently being used, and the total available.

**Connections Obtained**

The total number of times that a connection was used to send and/or receive data from the database server.

**Milliseconds Spent Waiting for These Connections**



The total time to get one of the available database connections. If this number is high, it means that the database is slow to give resources, which may mean that it is under powered for the demand being put on it.

### **Average Time to Execute SQL and Receive a Response, in Milliseconds**

The average time to send a request to the database server and receive a response. A large number here means the database server is not fast enough to give good results, or the network communication is too slow. A sustained average less than 10 milliseconds is good, where higher numbers indicate problems.

## **Recent DNS Engine Stats**

---

### **Successful Lookups**

The number of recently successful DNS lookups.

### **Failed Lookups**

The number of recently failed DNS lookups.

### **UDP Packets Sent**

The amount of bandwidth currently being used by the DNS resolver currently, indicating how busy it is.

### **Domains to Resolve**

The number of domains that are waiting to be resolved by the ListManager DNS engine.

## **Recent Incoming Stats**

---

### **Messages Received**

The number of messages received by ListManager recently.

## **Recent SPF Engine Stats**

---

### **Parsed Count**

The number of recently received messages checked for SPF.

### **Cache Size**

The size of the SPF lookup cache.

### **Not Yet in Cache**

The number of domains that are waiting to be resolved by the ListManager SPF engine.

### **Pass**

The number of messages which have passed SPF authentication.

### **Fail**

The number of messages which have failed SPF authentication.

### **Softfail**

The number of messages which have softfailed SPF authentication.

### **Neutral**

The number of messages which have a neutral SPF status.

### **Error**

The number of messages for which an error was received when attempting SPF authentication.

## **Utilities: Administration: Server: Operational Statistics: Mailing Statistics**

---

The Mailing Statistics page gives you information about your ListManager server's mail sending statistics, at any one given point in time.

The charts on the right of the page visually represent the recent mailing speed of the node you are logged into. To expand, click the legend below each chart

### **Terms Used in Server Mailing Statistics**

---

#### **Protocol**

A method of communication that has certain rules. Almost like a human language, it is the way data is formatted and presented that only makes sense to a computer program if it is expecting that protocol. This is just like human language in that we may immediately understand another person if he/she is speaking a language we know, but we have no idea if the language is different, even if both languages are trying to communicate the same ideas.

#### **SMTP**

SMTP stands for Simple Mail Transfer Protocol. This protocol regulates how mail servers talk to each other to send mail.

#### **Thread**

A thread is a method by which independent tasks are executed at the 'same' time by quickly alternating between them. Using threads allows a system with just one 'brain' (the CPU) to act as if is doing many things at once, but in fact, it is doing a little bit of each task and then switching to the next task. However, this is done so quickly that it appears the system is working on many things at the same time. As an example of the human body, you could say that there is a thread running your heart, one for breathing,

and others for digestion and other bodily functions. Each of these things is happening at the same time, and could be considered similar to threads.

### **Socket**

A connection to another computer. It is similar to placing a phone call. When you dial you are attempting to connect, and once the connection succeeds, a 'socket' is established. If the receiving end refuses the connection or is too busy (gives you the busy signal), then the socket is not established.

### **TCP**

TCP stands for Transmission Control Protocol, which is the way most data is actually packaged and formatted through the Internet.

### **NNTP**

NNTP stands for Network News Transport Protocol. It is used if you are using the MultiView option to allow users to read postings using a newsreader.

### **TCLPORT**

TCLPORT is the means by which the ListManager web interface is generated.

## **Mailing Statistics**

---

### **Emails Mail Merged and ready to Queue**

Individual email messages from a mailing that are merged and ready to send, but have not started the sending process yet.

### **Emails in Progress**

The total number of emails that the mail engine is currently processing. This is similar to Total SMTP connections in progress, but is a count at a different part of the program, so the numbers are slightly different. The stats that follow break down this count of messages into their exact steps, but done roughly, so the numbers may not always add up correctly. The point of this is to see approximately what the distribution of steps is currently.

### **Waiting for Available MX Host to Mail Server**

Those that are waiting for the mail server to have an available connection for ListManager to use.

### **Waiting for a Connection to Mail Server**

ListManager has started a connection to a mail server, and these number are waiting for a response.

### **Waiting for Response to Connection**

A connection has been established, and this number are waiting for the server to send its first introduction data.

### **Waiting for Response to HELO Command**

The number of sockets waiting for a response to the SMTP 'HELO' command.

### **Waiting for Response to MAIL FROM Command**

The number of sockets waiting for a response to the SMTP 'MAIL FROM' command.

### **Waiting for response to RCPT TO command**

The number of sockets waiting for a response to the SMTP 'RCPT TO' command.

### **Waiting for Response to DATA Command**

The number of sockets waiting for a response to the SMTP 'DATA' command.

### **Waiting for response to RSET command**

The number of sockets waiting for a response to the SMTP 'RSET' command.

### **Sending message data**

The number of sockets actually sending the data portion of the message.

### **Waiting for Response to Message Data**

The number of sockets waiting for a response to the sent data.

### **Committing Message**

The number of sockets in the final stage of internal cleanup after attempting to send a message.

### **Average Connect Wait**

The average time it is taking to establish a connection to a mail server.

### **Average Response to Connect Wait**

Average time it takes a mail server to send the initial text after a connection is established.

### **Average HELO Wait**

Average time to receive a response to the SMTP command "HELO"

### **Average MAIL FROM Wait**

Average time to receive a response to the SMTP command "MAIL FROM"

### **Average RCPT TO Wait**

Average time to receive a response to the SMTP command "RCPT TO"

### **Average RESET Wait**

Average time to receive a response to the SMTP command "RSET"

### **Average DATA wait**

Average time to receive a response to the SMTP command "DATA"

### **Average Time to Send Message Data**

The average time it takes to send the actual message body of an email message.

### **Average Time for (n) Emails Sent**

The average time it takes, from the moment ListManager connects to a mail server to the time it finishes sending, to deliver mail, for all the different mail messages processed thus far.

### **Socket Cache Hits**

The number of times that a connection was needed to a mail server and one was already open and available within ListManager.

### **Socket Cache Misses**

The number of times that a connection was needed to a mail server and none were already connected and available from within ListManager.

### **Sockets in the Socket Cache**

The number of sockets that are connected to a mail server but are currently available for use. This is the number that Socket cache hits would be attempting to pull from.

### **Time to Process all Sockets for Activity Once**

The amount of time it takes to process all sockets (total from Emails in progress) for any activity. That is, how long to check each socket to see if new data is available from a mail server, or if the server can now accept new data from us.

### **Message Body Bytes Desired to Send, this Period**

The amount of data, in bytes, we wanted to send from this pass through all the sockets.

### **Message Body Bytes Actually Sent, this Period**

The amount of data we were actually able to send. If this number is regularly less than Message body bytes desired to send, this iteration, or is significantly less than it, then the operating system is not able to keep up with the speed at which ListManager is throwing data at it.

### **Failed Because of Read Timeout**

ListManager waited for a response from a server so long that it eventually gave up on it.

### **Failed Because of Write Timeout**

ListManager tried to send an email to a server so long that it eventually gave up on it.

### **Failed Because of Connect Timeout**

ListManager tried to connect, but gave up after waiting too long. Similar to letting a phone ring for many times, and then finally hanging up.

### **Failed to Connect**

ListManager failed to connect to the receiving mail server.

### **Seconds Elapsed Since Lyris ListManager Started**

The number of seconds since ListManager was started.

### **Mail Messages Successfully Sent**

The total number of email messages successfully sent by ListManager since the server was started.

### **Mail Messages Attempted, but Could Not Be Sent**

The total number of email messages ListManager attempted to send but was unable to do so since the server was started.

### **Mail Bytes Sent**

The total number of bytes sent by ListManager since the server was started.

### **Limiting Overqueue from Domains**

ListManager prevents the mailing queue from being dominated by a few domains, preventing mail from being sent. Listed here are the domains being limited.

### **Number of Outbound SMTP Connections Listed by Domain**

All the domains and IP addresses for which ListManager is currently processing outgoing messages. Each domain and IP address is listed, with a number indicating how many messages are being processed to that domain/IP.

### **Total Connections**

The total number of connections represented by the data above. This is different than Number of outbound SMTP allocations listed by Domain because this figure represents the total connections ListManager has already connected to, or is currently trying to connect to, rather than just the list of all those that we would like to connect to. And because of connection caching, ListManager can remain connected to more sockets than the figure given in the Number of outbound SMTP allocations in some cases.

### **Total Messages Mail-Merged and Ready to Send**

The number of messages which have been processed for all mail merge tags and Tcl scripts, and are waiting to be sent.

### **Currently Active Jobs**

The currently active outgoing jobs. Listed here is the ID from the outmail record, the 'type' of mail this is, whether or not it is in the first send try or a retry, and finally the list that this message is associated with.

### **Status of currently processing incoming messages**

The currently active incoming jobs. Listed here is the ID from the inmail record, the 'type' of mail this is, and the date and time received.

### **Messages Currently in the Cache that have been worked on recently**

The message numbers for outgoing messages recently created or worked on. Click the mailing ID to go to the [Mailings: Mailing Status: View Outgoing Mailing: Message Body](#) page, where details about the outgoing mailing can be seen.

### **Total Depth of the Thread Pool**

The amount of pending mailings which have not yet been written to the database. This can be thought of as the amount of remaining work for the server to do. As they are written and the mailings sent, this number will decrease.

### **Total Threads in the Pool**

Total number of threads (work) yet to be written to the database. The server mailing speeds may adjust to maintain a constant, or near-constant number.

## **Server Log**

# **Utilities: Administration: Server: Server Log**

---

The Server Log shows all mailings sent by the server, including all nodes. To keep a log, you must have [Utilities: Administration: Server: Server Settings: Automatic Maintenance: Logging](#) enabled.

### **Finding a Log Item**

Twenty log items are shown at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of log items at a time.

You may change the sorting order of the log items by clicking the up or down triangles next to Date, Name or Byte size. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty log items, **Previous** to see the last twenty.

### **Viewing a Log Item**

To view a log item, click on the name or "view" next to the log item you'd like to view. You will be taken to the [Utilities: Administration: Server: Log: View Log Item](#) page, where you can view the log item.

### **Deleting a Log Item**

Click **Delete** next to the log item you'd like to delete. ListManager will ask you if you're sure before deleting the log item.

### **Download as a File**

Click on the disk icon to download your list of log items in CSV format.

# Utilities: Administration: Server: Log: View Log Item

---

**Description**

A description of the transaction.

**Source**

The type of mailing it is.

**Subject**

The message's subject.

**Body**

The body includes the incoming mail id, outgoing mail id, archive message id, subject, author, and message byte size.

**Date Created**

The date the log item was created.

**List Name**

The list this message was for.

**User Name**

The sender of the message.

**Recipient Count**

The number of recipients for this message.

**Byte Size**

The size of the message, in bytes.

**Site**

The site for the message

**Log ID**

The Log ID ListManager assigned this log item.



## Database

# Utilities: Administration: Server: Database Administration

---

As a server administrator, you may administer your ListManager database within the ListManager interface. You may:

- View and edit tables
- Run SQL queries
- Add and delete demographics columns to the ListManager members\_ table
- Insert rows into any table

ListManager stores all information about your members in one table, generally the members\_ table.

**WARNING** Using these tools can permanently alter your ListManager database. Inserting, editing or deleting data may cause ListManager to malfunction in unpredictable ways, and should be done at your own risk.

Consult a database administrator if you are uncertain about a function or query. Information about the ListManager tables is available in the [Programmer's Guide](#).

## View and Edit Data

# Utilities: Administration: Server: Database: View and Edit Data: View Member Table

---

The View Member Table page allows you to view the ListManager members\_ table, which contains the fields it uses to send mail to each member and to keep track of their membership status.

You will be taken to the [View Query Results](#) page, where you may sort the members, edit rows or delete them.

For more information about the members\_ table, please see the Programmer's Guide:

<http://www.lyris.com/support/listmanager/software/>

# Utilities: Administration: Server: Database: View and Edit Data: View Any Table

---

The View Any Table page allows you to select a ListManager table to view. The drop-down box displays which tables you may view.

After selecting a table, you will be taken to the [View Query Results](#) page, where you may sort the data, edit rows or delete them.

For more information about the tables available to you, please see the [Programmer's Guide](#).

## Utilities: Administration: Server: Database: View and Edit Data: View Member Segment

---

The View Segment page allows you to view members in a particular [segment](#).

### Finding a Segment

Twenty segments are shown at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of rows at a time. Click **Next** to see the next twenty rows, **Previous** to see the last twenty.

You may change the sorting order by clicking the up or down triangles next to Segment Name, Description, and Created For. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a).

#### Segment Name

The segment's name.

#### Description

The segment's description.

#### Created For

The list for which this segment was created.

### Viewing or Editing an Existing Row

To view a row, click on the segment's name or on View next to the row. You will be taken to the [View Query Results](#) page, where you can view the members, edit them, or delete them entirely.

Use caution when editing or deleting data directly in this manner. Changes made directly to the database may cause ListManager to malfunction in unpredictable ways, and should be used at your own risk.

Consult a database administrator if you are uncertain about changes you'd like to make. Information about the ListManager tables is available in the Programmer's Guide:

<http://www.lyris.com/support/listmanager/software/>

### Download as a File

Click on the disk icon to download the list of segments in CSV format.

## Utilities: Administration: Server: Database: View and Edit Data: Run Your Own SQL Query

---

You may run your own SQL query by typing it here. If successful, you will be taken to the [View Query Results](#) page; if unsuccessful, you will see the SQL error generated by your SQL server. User-entered queries cannot be sorted in the interface, in order to prevent exceptions when trying to sort on a textblob column. For sortable columns, use [View Member Table](#), [View Member Segment](#), or [View Any Table](#).

**WARNING** Running your own SQL query can permanently alter your ListManager database. Inserting, editing or deleting data may cause ListManager to malfunction in unpredictable ways, and should be done at your own risk.

Consult a database administrator if you are uncertain about a function or query. Information about the ListManager tables is available in the [Programmer's Guide](#).

## Utilities: Administration: Server: Database: View and Edit Data: View Query Results

---

You will be taken to this page if you view a table, view a segment, or run your own SQL query.

### Finding Data

Twenty rows are shown at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of rows at a time. Click **Next** to see the next twenty rows, **Previous** to see the last twenty.

You may change the sorting order by clicking the up or down triangles next to each field. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a).

### Viewing or Editing an Existing Row

Click "view" next to the row to view it. You will be taken to the [View Row](#) page, where you can view the data, edit it, or delete it entirely (you may not edit or delete results from your own SQL queries).

Use caution when editing or deleting data directly in this manner. Changes made directly to the database may cause ListManager to malfunction in unpredictable ways, and should be used at your own risk.

Consult a database administrator if you are uncertain about changes you'd like to make. Information about the ListManager tables is available in the Programmer's Guide:

<http://www.lyris.com/support/listmanager/software/>

### Download as a File

Click on the disk icon to download the data in CSV format.

## Utilities: Administration: Server: Database: View and Edit Data: View Row

---

This page will display the Field Names and Field Values for the row you have selected from View Query Results.

Edit the Field Value by clicking on Edit next to the Field Name. Delete the entire row by clicking **Delete** row at the bottom of the page.

Use caution when editing or deleting data directly in this manner. Changes made directly to the database may cause ListManager to malfunction in unpredictable ways, and should be used at your own risk.

Consult a database administrator if you are uncertain about changes you'd like to make. Information about the ListManager tables is available in the [Programmer's Guide](#).

### Add/Remove Member Columns

## Utilities: Administration: Server: Database: Add/Remove Member Columns: Add Column to Member Table

---

The members\_ table is used by ListManager to store all information about your list members. It contains the fields it requires to send mail to each member and to keep track of their membership status. It also has three fields, Additional\_, UserID\_, and Comment\_ that it does not use and that you may populate with the data you choose.

If you add additional fields to the ListManager members\_ table, you may import or add members with additional data. Having these fields in the members\_ table (as opposed to another table) allows you to use the wizards in Content to easily personalize your mailings. You may segment your list more easily as well.

### Adding a Member Column

1. Go to Utilities: Administration: Server: Database Administration: Add Member Column.
2. Enter the **Field Name**. Valid field names should not have spaces.

3. Enter the **Field Type**.

**Caution** Field Types must be one of the options listed below. Other types will produce strange results or cause errors.

**Number (Integer)**

Numeric data only (no characters).

**Date**

A date field.

**One, Two or Three Character String**

A field that must contain one, two or three characters; the length is not variable.

**Variable Length String**

A field that may contain characters or numbers, and may vary in length up to the max specified.

4. Click **Add**.

5. Restart ListManager and the ListManager web server for your changes to be visible in the ListManager web interface. The change has already taken place in the database, but ListManager must be restarted to recognize it.

## Utilities: Administration: Server: Database: Add/Remove Member Columns: Add Column Wizard

---

The Add Member Column Wizard allows you to quickly and easily add common demographics columns to your members table.

Just check the demographic columns you'd like added, and click on Add at the bottom of the page. The columns will be added and available to you after you have restarted ListManager and the ListManager Web Server.

Note that you may change the Data Type. For the predefined fields, it's best to use the default settings (e.g., you would not want to use anything other than "date" for a birthday field). However, you may want to change the data type for the more generic fields, or make the address fields longer.

If you'd like to name your own column, use the [Add Member Column](#) utility.

## Utilities: Administration: Server: Database: Add/Remove Member Columns: Remove Column from Member Table

---

You may delete member columns that you have previously added. CAUTION: all data in deleted columns will be deleted as well.

### Deleting a Column

1. Select the column you'd like to delete.
2. Click **Delete**.
3. Restart ListManager and the ListManager web server for the change to be visible in ListManager. The change has already taken place in the database, but ListManager must be restarted to recognize it.

### Add/Remove Action Tag Columns

## Utilities: Administration: Server: Database: Add/remove Action Tag Columns: Add Column to Action Tag Table

---

The clickstreamdata\_ table is used by ListManager to store all information about action events, such as purchases. It contains the fields it requires to track member movement on your Web site. It also has six fields, UnitPrice\_, Quantity\_, Points\_, Stage\_, ProductSku\_ and OrderID\_ that it does not require and that you may populate with the data you choose when you create Interest Tags or Purchase Tags.

If you add additional fields to the ListManager clickstreamdata\_ table, you may track more information about members when you create tags.

### Adding an Action Tag Column

1. Enter the **Field Name**. Valid field names should not have spaces.
2. Enter the **Field Type**. Field Type options are:

#### **Number (Integer)**

Numeric data only (no characters).

**Date**

A date field.

**One, Two or Three Character String**

A field that must contain one, two or three characters; the length is not variable.

**Variable Length String**

A field that may contain characters or numbers, and may vary in length up to the max specified.

3. Click **Add**.
4. Restart ListManager and the ListManager web server for your changes to be visible in the ListManager web interface. The change has already taken place in the database, but ListManager must be restarted to recognize it.

## Utilities: Administration: Server: Database: Add/Remove Action Tag Columns: Remove Column from Action Tag Table

---

You may delete Action Tag columns that you have previously added. CAUTION: all data in deleted columns will be deleted as well.

**Deleting a Column**

1. Select the column you'd like to delete.
2. Click **Delete**.
3. Restart ListManager and the ListManager web server for the change to be visible in ListManager. The change has already taken place in the database, but ListManager must be restarted to recognize it.

**Define Demographic Columns**

## Utilities: Administration: Server: Database: Define Demographic Columns

---

When you create additional Member Columns and Action Tag Columns, you may also want to *define* those columns so that they are available as charts in Reports.

For example, let's say you add a column to your Members table called Country. By defining this column, you may see reports which break down your data by Country in the Demographic Charts section of each type of report. Once you've defined Country, for instance, you may go to Reports: Members: Demographic Charts and view member data as broken down by country.

Not all demographic information is useful to chart. For example, charting zip codes may be interesting, but charting social security numbers would probably not be (as the data is unique for each member).

## Utilities: Administration: Server: Database: Define Demographic Columns: New Definition

---

See [Database: Demographic Definitions](#) for more information about defining demographic columns.

### Description

Enter a description for this demographic column.

### Database Column and Field

Select the database column you'd like to define. Only fields in your members and Clickstreamdata\_ tables will be available here. If you have just created a new members or Action Tag column, you will need to restart ListManager and the ListManager web server to have those pages appear here.

### Data Type

Select the type of data for this field. The options are text, date, or numerical value.

### Insert Row

## Utilities: Administration: Server: Database Administration: Insert Row

---

You may insert a row directly in any ListManager table. Simply select the table you would like to insert a row into, and then enter the data into the fields.

This feature should only be used by database administrators and those who are very familiar with the ListManager database structure and the formats the data must be in. Inserting a row incorrectly may cause ListManager to malfunction in unpredictable ways, and should be used at your own risk. Information about the ListManager tables is available in the Programmer's Guide:

<http://www.lyris.com/support/listmanager/software/>



## Utilities: Administration: Server: Database: Database Connections

---

See [ODBC](#) for general instructions on how to create and use database connections.

### Database Connections Table

This table displays the database connections available for this server. Click the magnifying glass to search this table, the spreadsheet icon to download the table as a CSV file, or the question mark icon to view help for this page.

You may change the order the connections are displayed by clicking on the column headings. The headings are:

**Connection Name**

The name assigned to this database connection. Click on the name to edit the connection.

**Connection String**

The connection string used to connect to the external data source.

**Applies To**

Indicates which list or site may use the connection, or whether the connection may be used by any list on the server.

### Connection Options

From this table you have the following options for each connection:

**Copy**

Copy this connection. You will be taken to a page which will display the old name and description, and the new name and new connection string. Once the connection is copied, you may edit it further.

**Delete**

Delete this connection. Synchronization for any list using this connection will be disabled.

**Test**

Test this connection. The test will verify that the ODBC connection string works and that the SQL query is accepted and returns results. It will not examine the results of the SQL query or run a simulated import against any list.

If the test produces an error, the error message will indicate the cause (problems with the driver, query, etc).

If you see this error message, check that you have permission to view the table:

"If SQL query does not contain EmailAddr\_ field, then it must contain both UserNameLC\_ and Domain\_ fields."

### **Create New Connection**

Opens the [New Database Connection](#) screen.

## **Utilities: Administration: Server: Database: Database Connections: New/Edit Database Connection**

---

This page lets you specify how ListManager should connect to an external data source.

### **Name**

The name of this connection.

### **Connection String**

The ODBC connection string that ListManager should use to connect to your external data source. Contact your driver vendor for the connection string to be used here.

### **MS SQL**

```
Driver={SQL Server};Server=Imtest;Database=Imdb;Uid=sa;Pwd=pass
```

### **Oracle**

```
DSN=DSN_Name;Server=Imtest;Uid=Imuser;Pwd=pass
```

### **MySQL For Unix:**

```
Driver={MySQL ODBC 3.51 driver};server=Imtest;database=Imdb;uid=mysqluser;pwd=pass;
```

### **MySQL for Windows:**

```
Driver={MySQL ODBC 3.51 driver};server=Imtest;database=Imdb;uid=mysqluser;pwd=pass;
```

### **Example Using DSN**

```
DSN=Oracle
```

### **Applies To**

Specify which list or site may use the connection, or whether the connection may be used by any list on the server.

### **Select Query**

Enter the SQL "select" query that should be used to synchronize data between your external data source and ListManager. The SQL query should have field names that exactly match field names in the [members](#) table; if any do not match, the synchronization of the list will fail.

The SQL query will be executed and tested with read-only access so that if it attempts to make any changes to the source database it will fail.

### **Email Address**

The select query must specify an email address by either specifying the value to use for EmailAddr\_, or for both UserNameLC\_ and Domain\_. If the EmailAddr\_ field is included, ListManager will automatically break apart imported email addresses around the @ symbol to produce the values for UserNameLC\_ and Domain\_ fields. If the EmailAddr\_ field is not included, ListManager will assemble the email address from the UserNameLC\_ and Domain\_ fields. If EmailAddr\_ is missing and the query does not contain both UserNameLC\_ and Domain\_, synchronization will fail.

### **Password**

If the Password\_ field is included, ListManager will examine each password to determine whether or not it is encrypted (if password is 32 characters long and all characters are a-f or 0-9, List Manager assumes it is encrypted). If password is not encrypted, ListManager will check whether the password is the word *random*. If so, ListManager will generate a random numeric password and encrypt it. Otherwise, ListManager will encrypt the given password. If the password is already encrypted, ListManager will store the password without modification. The Password\_ field will only be used for new members; the password of existing members will never be updated.

### **List**

The List\_ field may not be used for synchronization. Synchronization of the list will fail with an error message if the SQL query contains the List\_ field.

### **Membership Status (MemberType\_)**

The MemberType\_ field will *not* be verified (*i.e.* any value will be permitted even if not in our standard set). Whether or not the MemberType\_ field is actually used depends on options selected for creating new members and updating existing members in the [synchronization settings](#) for the list.

Valid MemberType\_ values are:

- normal (default)
- unsub
- held
- private
- expired
- held
- needs-goodbye
- needs-hello
- needs-confirm

See [Members: Add Members: Add Member: Settings: Member Status](#) for more information about these different member statuses.

### **Sample Select Query**

This query is connecting to a table called *info*. The *state* field has been added to the ListManager Members\_ table.

```
select info.email as EmailAddr ,
info.status as MemberType ,
info.state as state
from info
```

### Important Query Notes

- You must have permission to view the table in the query. If you do not have permission, you will see the following error message when you test the database connection:

Test failed because of the following error:

If SQL query does not contain EmailAddr\_ field, then it must contain both UserNameLC\_ and Domain\_ fields.

- The query must be a *select* query. *Update*, *insert*, and **Delete** queries will generally not work.
- Please *test* your query thoroughly before putting it into production.
- Do not update the password\_ field. The ListManager password\_ field is encrypted.

## Debug Log

### Utilities: Administration: Server: Debug Log

---

The Debug log is intended for programmers to diagnose and see any problems associated with the log files created by ListManager. This feature is only available to server administrators. The debug log view in the GUI reads the same text log files which are created automatically by ListManager, which is in the same directory as your ListManager executable. Multiple log files are created over time, usually log1.txt, log2.txt, log3.txt, etc.

To disable the ListManager startup logging, edit [lmcfg.txt](#) and include the following line:

```
$log_startup_messages="no"
```

#### View Log Main Page

Displays the complete log, including the time and date of the item, the error level, the subsystem, and the actual error message. To view a smaller, filtered list, click on Filter current view:

#### Filter Current View

This allows you to filter the view to customize it for what you are looking for. Filters can be set based on subsystems, and error levels. Once you have set the view, click "view" to see the filtered log file.

### Configure Log

---

This page controls what ListManager is actually saving to the log.txt file, and whether a log file will be kept.

## Subsystems

Which ListManager subsystems should be logged. By default, all subsystems are selected. Uncheck the subsystems you do not want to log. Click "All" to log all subsystems.

## Log Error Level

What level of logging should be performed. Note that many SQL server problems will only be displayed as warnings, not errors.

## Log to Console?

Specifies whether ListManager should log to the console window.

## Log to File?

Specifies whether ListManager should log to a file. If enabled, ListManager will start a new log file every time ListManager is started, and when the number of lines in the file exceeds Max Lines In File.

## Max Lines In File

The maximum number of lines a single file should have before starting a new file. The default value is 100000 lines. The minimum number of lines is 1000.

## Max Log Files

The maximum number of log files ListManager should maintain. The default is blank, for unlimited. The lowest number of files that may be allowed is 10.

## Saving the Log

---

### To save the log as a text file that you can open with Wordpad

1. Click **Download As File**.
2. A message appears warning you that the save operation may take some time. To continue, click **Save**.
3. Click **Save** again.
4. The **Save As** dialog appears. Follow the usual steps for saving a file.

## Web Access Log

## Utilities: Administration: Server: Web Access Log

---

The web access log shows which pages administrators have accessed. This log may be used to audit which pages particular administrators have used. The length of time these logs are kept may be limited in [Utilities: Administration: Server: Server Settings: Automatic Maintenance: Purging Old Data](#).

You may change the order pages are displayed by clicking on the up or down triangles on the column headings. The headings are:

**Date/Time**

The date and time the page was accessed.

**IP Address**

The IP address the page was accessed from.

**User**

The administrator who accessed the page.

**Type**

The type of administrator: list, site or server.

**List**

The list this administrator was logged into.

**URL**

The ListManager URL this administrator accessed.

To search this table, click . To export this table as a CSV file, click .

## Internationalization and Localization: Translations

### How Do Character Sets Work?

---

A character set is a collection of symbols that represent the printable characters of a language. There are many standard character sets in use today. The correct character set choice for a message will depend on its language and on which character set is likely to be supported by the mail clients that your message recipients will use. Some languages are supported by multiple character sets and some character sets might be used for multiple languages. Additionally, your operating system, web browser and/or text editor will help determine which character set would be used to compose a message. Also, you should be sure that your recipients are likely to have that character set installed on their systems and that their email client is capable of using alternate character sets. Note that some web-based email clients may not support international character sets.

Extended characters are characters beyond the standard 7-bit ASCII characters. These are the characters that usually differ between character sets. The 7-bit ASCII characters are part of most character sets used for email messages and web pages.

Encoding is used to convert an 8-bit message into a 7-bit message. Most English language messages only use 7-bit characters. 8-bit characters are used for special symbols and additional characters for other languages. Since it is possible that someone may be using an older mail server that cannot handle 8-bit messages properly, messages that include 8-bit characters are often encoded to 7-bits using either quoted-printable or base64 encoding methods. This is not a requirement though.

The quoted-printable encoding is used when the majority of the characters in a message can be represented by 7-bits. In this case, only the 8-bit and certain 7-bit characters are encoded making the encoded message body mostly readable. If the message contains a significant number of 8-bit characters, base64 encoding might be more space efficient.

## Utilities: Administration: Server: Internationalization and Localization: International Character Sets

---

### [How Do Character Sets Work?](#)

The Internationalization feature allows you to create content and send mailings in languages that require characters that are not part of the standard ASCII character set.

Before you enter any content into the web interface you must select the character set that you want to use for this content. If the character set you want to use does not exist, your server administrator can create it here (see below).

**NOTE** You can also import HTML into your content that has a meta tag which sets the character set. That character set will be selected in the Internationalization tab of the Create Content page and used for the content.

Example:

```
<meta content="text/html; charset=iso-2022-jp" http-equiv="Content-Type" />
```

To use international character sets, this feature must be enabled by a server administrator. For more information on this, see [Utilities: Administration: Server: Server Settings: Advanced: Enable Features](#). If this feature is disabled, ListManager defaults to the ISO-8859-1 character set and quoted-printable.

## Creating a New Charset

---

If the character set you are looking for is not available in ListManager, you can create a new one by clicking the **Create New Charset** button.

### **Name**

Enter a Name for the new character set; it must be the same as what the standard for that charset specifies.

### **Description**

The Description field is purely informational and is only there to aid in referencing this particular character set when looking for the correct character set in the list.

The ID number will be automatically created for you, in sequential order. This will then be available to you when you create new content or a new mailing. See [Content: New Content: Internationalization](#) and [Mailings: New Mailing: Internationalization](#) for more information.

The Name and Description should contain only standard ASCII characters since these fields are displayed in parts of the web interface that may not be displayed in the same character set.

## **Utilities: Administration: Server: Internationalization and Localization: Translations: Keys**

---

The Translations section contains settings and features related to the translation of the web interface.

The Keys section has a listing of all strings displayed in the web interface. A "string" is a sequence of characters that make up a word or sentence in the context of a programming language. It also keeps track of what images are being used by the web interface. This page is generally only useful if you want to remove an obsolete string from the database.

### **Creating New Keys**

Click the create new key button to create new keys. When a new translated string is added to the web interface, a Key for that string must be added to the database. In general, this key will be the string itself. The exceptions are strings longer than 255 characters, which are referenced by a tag instead of the original string. Strings will generally be of the type "text." Images also exist as translation keys of different types but these are used only for tracking the translated images and are not individually translated.

Only "text" type keys have translations. If the key is an image, you may specify the image path.

For assistance with languages and translations, please contact Lyris Technologies at [translations@lyris.com](mailto:translations@lyris.com)

## **Utilities: Administration: Server: Internationalization and Localization: Translations: Create and Edit Languages**

---

The Translations section contains settings and features related to the translation of the web interface.



The Create and Edit Languages section lets you define the languages that translations will be provided for. To edit an existing language, click on the language name link to view the Edit Language page.

## Utilities: Administration: Server: Internationalization and Localization: Translations: Translation Values

---

The Translations section contains settings and features related to the translation of the web interface.

The Translation Values section is where translated strings are added to the database for each language. A "string" is a sequence of characters that make up a word or sentence in the context of a programming language. Once a string is translated, it then has a translation value, which can be edited by clicking on the original value name on the Translations Value page.

For assistance with languages and translations, please contact Lyris Technologies at [translations@lyris.com](mailto:translations@lyris.com)

### DNS Diagnostic Tool

## Utilities: Administration: Server: DNS Diagnostic Tool

---

This tool allows you see the lookup results that ListManager's DNS resolver gets for the domain you enter here.

### Domain Name

The domain name you would like to test. Enter the domain name here, and click **submit**.

If ListManager is unable to resolve the domain, check that port 53 is available to the Internet.

If ListManager resolves an internal domain incorrectly, you may need to enter a [DNS Bypass](#) for that domain to let ListManager deliver mail to your domain properly.

# Sites

## Utilities: Administration: Sites

---

Sites are groupings of lists that share certain characteristics, such as domain name and IP address. They can be used to organize and administer the lists in your ListManager server.

### Sites and Internet Host Name

A site is characterized by its Internet host name. You can have multiple sites on your server, and each one can have its own host name. All lists under that site use that host name after the @ sign when sending mail.

If you have multiple divisions in your organization, or if you are hosting other people's lists, each group of lists can use a separate domain with its own "brand." For example, if you were a publisher with many different imprints, each one could have its own domain—brand1.example.com, brand2.example.com, etc. The messages being sent from these different sites would appear to be completely independent of one another.

The Internet host name assigned to a site determines whether email and web traffic will reach ListManager successfully. If you are unable to access ListManager via email, or if web forms or clickthroughs do not work properly, check that DNS has been set up correctly for your host name(s).

Note that each site should use its own IP address(es) on the machine(s) running ListManager, so it may have its own SMTP and NNTP banners. If you are [clustering](#) ListManager, each site should have its own IP address on each node. Each site should then be configured on each node to use the IP address(es) assigned to it.

If multiple sites are using the same IP address, you should configure the sites to use the same banners so the banner specific to one site is not used for another.

### Sites and Administration

Sites can also make administration easier. A site administrator may administer all lists in a particular site, and may create new lists for that site. Making site administrators is often easier than making individuals list administrators of many separate lists.

If you do not have access to the Sites area, it may be that you do not have permissions to do so. Contact your server admin to be made a site administrator.

The number of sites you are permitted to have is determined by your license. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to have more sites.

### Finding a Site

Twenty sites are shown at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of sites at a time.

You may change the sorting order of the sites by clicking the up or down triangles next to Name or Description. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty sites, **Previous** to see the last twenty.

### **Viewing or Editing a Site**

To view a site, click on the name next to the site you'd like to view. You will be taken to the [Utilities: Administration: Sites: New Sites](#) page, where you can view or edit the site.

### **Copying a Site**

Click **Copy** next to the site you'd like to copy. ListManager will show you the old name and description for the site, and ask you for a new name and description. Once you have saved the site, you may edit it by clicking on the name.

### **Deleting a Site**

Click **Delete** next to the site you'd like to delete. ListManager will ask you if you're sure before deleting the site. Note that you cannot delete a site if you are logged into a list on that site. [Log in](#) to a different list to delete the site you're currently logged into.

### **Creating a Site**

Click create new site to be taken to the [Utilities: Administration: Sites: New Site](#) page.

### **Download as a File**

Click on the disk icon to download your list of sites in CSV format.

## **New Site**

# **Utilities: Administration: Sites: New Site: Essentials**

---

The Edit Site pages are identical to the New Site pages.

### **Name**

A single word (without spaces) which identifies the site. For convenience, a shorter name is better. You can use the underscore or dash characters to represent spaces, such as "yourcompany\_group".

### **Description**

A short set of words describing your site. For example "Your Company Software Ltd.". This is the text users will see in places where your site description is given.

### **Internet Host Name**

The machine name that you want ListManager to use for this site. For example, if you have created a DNS entry for the domain "lm.example.com" pointing to this machine, you may enter that name here.

The host name specified here will be merged in by ListManager for various email addresses for this site, such as the email unsubscribe address, error mail address, list owner address, etc.

The internet host name is also used by ListManager as the HELO text for this particular site.

It is vital that you enter a valid internet host name. If you enter an invalid internet host name, replies and error mail will not be routed correctly to this machine. For example, if you entered "ophelia.example.com" as the host name, but this host name pointed to another machine, messages sent from ListManager would have an incorrect bounce address and thus ListManager would not receive any error mail.

The ability to specify a different internet host name for each site allows different divisions or companies to share the same ListManager server.

### **URL to Web Interface**

This setting determines the path clickthroughs and other tracking use when they are merged in your mailings. By default, the host name of the machine ListManager is installed on will be displayed. Example:

```
http://lists.example.com
```

This setting does not determine the URL that administrators or discussion forum interface users use to access your server. That is determined by any DNS entries your ISP or sys admin has created for your ListManager server.

See [Logging In](#) and [Accessing and Logging into the Discussion Forum Interface](#) for more information about the ListManager URL.

If you have a high volume of clickthroughs or other tracking, your network administrator may have set up [other web servers](#) to handle the load. If that is the case, enter the URL of the other web servers that should be used for clicktracking. If you have an [SSL certificate](#) for your ListManager web server, you may use https: for the URL.

### **Enable WYSIWYG Editor?**

Specifies whether the [HTML WYSIWYG editor](#) should be enabled. By default, it is enabled. Select Noto disable the HTML WYSIWYG editor for all lists for this site.

### **Limit to License Level**

This setting is only visible to server administrators. When configuring sites, server administrators can decrease the features of a site to either the Enterprise, Pro, or Standard level. The license capability set for the "current list" that you are logged into will apply at the site.

This allows site-based license decreases, where a particular site can have a lower license level (i.e. Pro or Standard) than that set at the server level.

Note that server administrators will still have access to the full feature set allowed by the license, and will need to log in as a list administrator to see that the license level has been limited.

# Utilities: Administration: Sites: New Site: Message Wrapping

---

**Important note for users of earlier versions of ListManager:** The list, site or server message wrapping will not be automatically included to your message if you create it through the ListManager administrator GUI. Please remember to add these instructions to your content or mailing, or send the message to the list via email. See [Content: Insert Field: Unsubscribe](#) to see how to do so quickly and easily.

## **Prepend to beginning of every message on this site (Text message header):**

This setting allows you to define a header that will be applied to messages on all lists on the site. This header will appear after the server header (if one is defined) and before the list header.

In addition, the header will get properly inserted inside your HTML or MIME-encoded message, because ListManager is aware of which type of message you are trying to send.

## **Append to end of every message on this site (Text message footer):**

This setting allows you to define a footer that will be applied to messages on all lists on the site. This footer will appear before the server footer (if one is defined) and after the list footer.

In addition, the footer will get properly inserted inside your HTML or MIME-encoded message, because ListManager is aware of which type of message you are trying to send.

## **Prepend to beginning of every HTML message on this site (HTML message header):**

You can create a header that will be applied to every HTML message on the site. To open the WYSIWYG HTML Editor, click the **Enable HTML Editor** button.

## **Append to end of every HTML message on this site (HTML message footer):**

You can create a footer that will be applied to every HTML message on the site. To open the WYSIWYG HTML Editor, click the **Enable HTML Editor** button.

## **Prepend to beginning of every digest on this site**

This setting allows you to define a header that will be applied to digests on all lists on the site. This header will appear after the server header (if one is defined) and before the list header.

## **Append to end of every digest on this site**

This setting allows you to define a footer that will be applied to digests on all lists on the site. This header will appear after the server header (if one is defined) and before the list footer.

# Utilities: Administration: Sites: New Site: SMTP

---

## Incoming SMTP IP addresses

Specifies the incoming IP address(es) to be used for this site. When ListManager receives mail, it displays a banner identifying the server. You may want incoming mail for this site to see the site's host name for the banner. When mail servers connect to the IP address(es) specified here, ListManager will display the site's hostname in the banner. Which IP address a mail server uses to connect to your ListManager server depends on the DNS entry for the hostname.

The IP addresses displayed for these options are determined by a server configuration setting in: [Utilities: Administration: Server: Server Settings: Machine/Node Settings: IP Addresses: Machine IP Addresses](#).

We recommend that each site use its own incoming IP address. If you have multiple sites using the same incoming IP address, they should all use the same host name. Otherwise, the wrong SMTP banner may be used for mail being received by ListManager for the IP address, as it does not know which site the incoming mail is intended for at that stage of the SMTP transaction.

Note that if no site is configured in ListManager, ListManager will listen to ALL IP addresses on port 25.

## Incoming SMTP banner

Specifies the banner for incoming SMTP connections. By default, the banner displayed will show the host name:

```
220 yoursitehostname.example.com ESMTP Lyris ListManager service ready
```

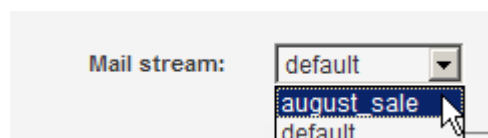
Any text specified here will replace the host name in the incoming SMTP banner. Note: If you have the [rebrandable](#) version of ListManager, your name will replace "Lyris ListManager" in the banner.

We recommend that each site use its own incoming IP address. If you have multiple sites using the same incoming IP address, you may wish to specify a "generic" incoming SMTP banner so the host name for another site is not used. Otherwise, the SMTP banner may show the host name for a different site, as ListManager does not know which site the incoming mail is intended for at that stage of the SMTP transaction.

## Mail stream

### To select a mail stream

Click the **Mail stream** drop-down list, and then choose the mail stream you want.



[Mail streams overview](#)  
[Create a new mail stream](#)

## Utilities: Administration: Sites: New Site: NNTP

---

### NNTP IP address

Specifies the NNTP IP address to be used for this site. When ListManager receives NNTP connections, it displays a banner identifying the server. You may want incoming mail for this site to see the site's host name for the banner. When NNTP clients connect to the IP address(es) specified here, ListManager will display the site's hostname in the banner. Which IP address an NNTP client uses to connect to your ListManager server depends on the DNS entry for the hostname.

The IP addresses displayed for these options are determined by a server configuration setting in: [Utilities: Administration: Server: Server Settings: Machine/Node Settings: IP Addresses: Machine IP Addresses](#).

We recommend that each site use its own IP address. If you have multiple sites using the same incoming IP address, they should all use the same host name. Otherwise, the wrong NNTP banner may be used for NNTP, as it does not know which site the incoming NNTP connection is intended for.

### NNTP banner

Specifies the banner for NNTP connections. By default, the banner displayed will show the host name:

```
200 yoursitehostname.example.com Lyris ListManager NNTP Service  
ready (posting ok).
```

Any text specified here will replace the host name in the incoming NNTP banner. Note: If you have the [rebrandable](#) version of ListManager, your name will replace "Lyris ListManager" in the banner.

We recommend that each site use its own incoming IP address. If you have multiple sites using the same incoming IP address, you may wish to specify a "generic" incoming NNTP banner so the host name for another site is not used. Otherwise, the NNTP banner may show the host name for a different site, as ListManager does not know which site the incoming NNTP connection is intended for.

## Utilities: Administration: Sites: New Site: Information

---

### Site logo

The URL to a web-ready graphic to be displayed in the web interface. Currently, the Site Logo is not used.

### Site URL

A URL which leads to the web page of this site. Currently, the Site URL is not used.

### Default Language

The main language used at this site. This setting is for informational purposes only.

### Address

Select a [document](#) for this field. This setting is for informational purposes only.

### Site contact

The list of administrators for this site (and server) is given here. Select one to be chosen as the administrator of this site. This setting is for informational purposes only, to inform users with questions about the site whom to contact.

### Tech support contact

The list of administrators for this site (and server) is given here. Select one to be chosen as the tech support contact for this site. This setting is for informational purposes only, to inform users with questions about the site whom to contact for technical support.

### Location

The physical location of the site. For informational purposes only.

## Utilities: Administration: Sites: New Site: Email Scripting

---

### Initialization Script

If specified, the script that will be called when a Tcl interpreter is created for a mailing.

These scripts are useful for setting up proxy settings for httpget or setting global variables.

These scripts are called in the order Server, Site, and List when a Tcl interpreter is created for a mailing. If no interpreter is required for the mailing, these scripts will not be run.

If your message requires these scripts to be run and you are not using TclMerge in your message (i.e., no Tcl scripting is used in your message), you may add the following to your message to cause the interpreter to be instantiated.

```
%%init ; return "%%"
```

To set a proxy server, the following lines may be added:

```
package require http 2.3
http::config -proxyhost (proxy ip address) -proxyport (proxy
port)
```



# Utilities: Administration: Sites: New/Edit Site: DomainKeys

---

DomainKeys is a sender authentication technology that gives your recipients the ability to verify the domain the email was sent from and assures them that the message was not altered during transfer. This can be a powerful tool that results in greater trust in your mailings.

In order to understand and get the most out of DomainKeys, we recommend that you review the [DomainKeys FAQ](#), and then follow the link on that page to [set up and use DomainKeys in ListManager](#).

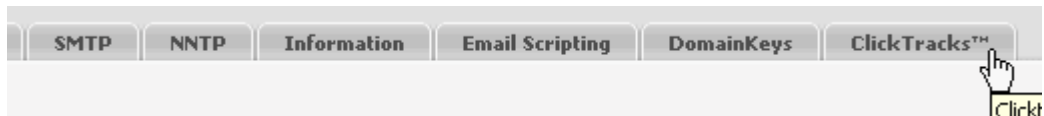
# Utilities: Administration: Sites: New Site: ClickTracks

---

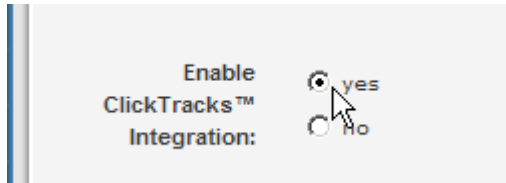
The instructions on this page tell you how to set up ListManager to work with ClickTracks. However, these steps are only a portion of the full process; to make this integration work, you must also perform a number of operations in ClickTracks. We recommend that you review the [DomainKeys FAQ](#) topic for the integration, and then follow the links starting on that page to learn about and complete the full process.

### To set up ListManager to work with ClickTracks

1. In the left Navigation bar, go to **Utilities > Administration > Sites**.
2. In the **Site Name** column, click the name of the site you want to work with.
3. Click the **ClickTracks** tab.



4. For **Enable ClickTracks Integration**, select yes.

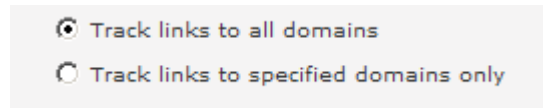


5. A string of text now displays in the **Integration Key** box.



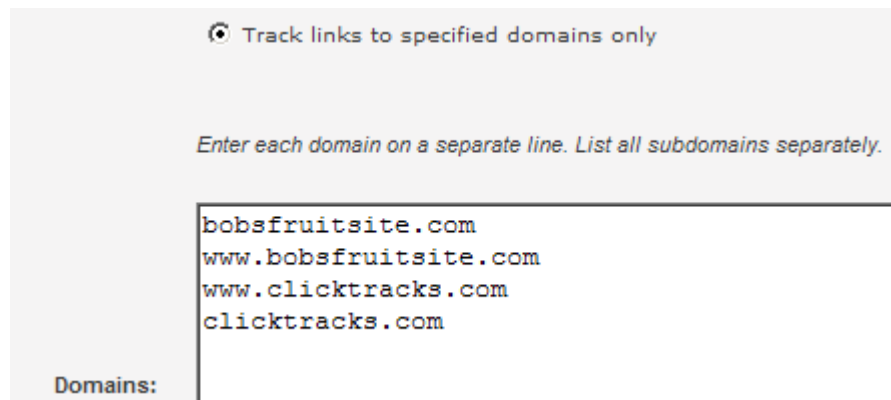
Select this text, and then copy it to the Windows clipboard. To copy, you can right-click and then choose **Copy**, press Ctrl+C, or on the **Edit** menu, choose **Copy**. Later, you will paste this text into ClickTracks.

6. If you want to track links to all domains, choose that option.



Track links to all domains  
 Track links to specified domains only

If you only want to track links for specific domains, select **Track links to specified domains only**, and then type the domains in the **Domains** box.



Track links to specified domains only

*Enter each domain on a separate line. List all subdomains separately.*

```
bobsfruitsite.com
www.bobsfruitsite.com
www.clicktracks.com
clicktracks.com
```

Domains:

7. Click **Save**.

## Topics

### Utilities: Administration: Topics

---

Topics are categories used to group mailing lists together. Every mailing list must belong to a topic, and a topic can contain many mailing lists. You may select the topic for a mailing list in [Utilities: List Settings: Basic Information: Basics](#). Topics are for informational purposes only, and do not organize lists in the discussion forum interface or determine any of their characteristics.

#### Finding a Topic

Twenty topics are shown at a time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of topics at a time.

You may change the sorting order of the topics by clicking the up or down triangles next to Name or Description. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty topics, **Previous** to see the last twenty.

### Viewing or Editing a Topic

To view a topic, click on the name next to the topic you'd like to view. You will be taken to the [Utilities: Administration: Topics: New Topic](#) page, where you can view or edit the topic.

### Copying a Topic

Click **Copy** next to the topic you'd like to copy. ListManager will show you the old name and description for the topic, and ask you for a new name and description. Once you have saved the topic, you may edit it by clicking on the name.

### Deleting a Topic

Click **Delete** next to the topic you'd like to delete. ListManager will ask you if you're sure before deleting the topic. Note that you cannot delete a topic if you are logged into a list on that topic. [Log in](#) to a different list to delete the topic you're currently logged into.

### Creating a Topic

Click create new topic to be taken to [Utilities: Administration: Topics: New Topic](#) page.

### Download as a File

Click on the disk icon to download your list of topics in CSV format.

## New Topic

# Utilities: Administration: Topics: New Topic: Basics

---

### Topic Name

Required. Single word which identifies the general topic for a list (for example, "sports"). Use only lower-case alphanumeric characters (a-z, 0-9), hyphens (-), or underscores (\_). Do not use spaces. This name is only seen by administrators.

### Description

(required) A few words used to describe this topic (for example, "Sports Lists").

### Hide This Topic

This option will hide the lists for a given topic from non-administrative users of the classic web interface (that used for ListManager 5.0 or earlier versions). This setting has no effect on how topics and lists are displayed in ListManager 6.0 or higher.

## Utilities: Administration: Topics: New Topic: Information

---

These settings are for informational purposes only. They are not used or displayed by ListManager in the discussion forum interface.

### Keywords

Words which describe this topic. If several words are specified, separate each one with a comma.

### Language #1

The main language used at this site. This setting is for informational purposes only.

### Language #2

The secondary language used at this site. This setting is for informational purposes only.

### Topic Contact

The list of administrators for the site (and server) is given here. Select one to be chosen as the administrator of this topic. This setting is for informational purposes only, to inform users with questions about the topic whom to contact.

### Long Description

Reference to a [document](#) that describes this topic.

### Comment

Reference to a [document](#) with comments about this topic.

### Sponsor

Reference to a [document](#) describing the organization sponsoring this topic.

## Mail Streams

### Utilities: Administration: Mail Streams

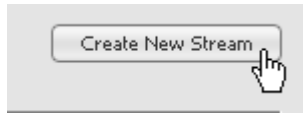
---

On the Mail Streams page, you can view create, edit, copy or delete mail streams.

**NOTE** A default mail stream is created when you install ListManager.

#### To create a new mail stream

1. Click the **Create New Stream** button. [Learn more.](#)



### To edit a mail stream

In the **Name** column, click the mail stream name. [Learn more.](#)

Name	Associated IPs	Description
default	1	Default mail stream.
...	...	...

### To copy a mail stream

Click the **Copy** command for the mail stream. [Learn more.](#)

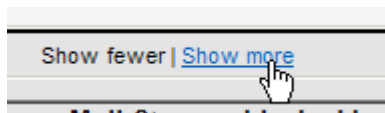


### To delete a mail stream

Click the **Delete** command for the mail stream.

### To view more mail streams when you have more than six

Click the **Show More** command



(A scroll bar appears, allowing you to scroll down to see more)

-or-

Click the **Next** button



(this causes the next page of mail streams to display)

## Blocking Information

The bottom two sections give you information about blocks:

### Mail Streams blocked by Domains

Mail Streams blocked by Domains		
Mail Stream	Blocking Domain	
New_IPs	mailblocks.com	<a href="#">Retry</a>
New_IPs	labvelocity.com	<a href="#">Retry</a>
New_IPs	kusd.edu	<a href="#">Retry</a>
New_IPs	htvc.com	<a href="#">Retry</a>

**Mail Stream:** The name of the mail stream that is blocked.

**Blocking Domain:** The name of the domain that is blocking the mail stream.

**Retry:** Click this command to try sending mail again.

### IPs and the MX servers that are blocking them

IPs and the MX servers that are blocking them						
Mail Stream	IP	Domain	Blocking MX	Description	Next Retry	
default	66.160.177.25	bldonline.com	69.38.24.138	IP Address Blacklisted	Permanent	<a href="#">Retry</a>
default	66.160.177.25	bldonline.com	209.208.0.20	Network Error	2008.06.13-14.00.13	<a href="#">Retry</a>
default	66.160.177.25	blender.com	63.144.166.88	Network Error	2008.06.13-14.00.10	<a href="#">Retry</a>
default	66.160.177.25	blockdistributing.com	207.40.216.17	Network Error	2008.06.13-14.00.51	<a href="#">Retry</a>
default	66.160.177.25	blocksender.com	216.40.33.252	Network Error	2008.06.13-14.02.43	<a href="#">Retry</a>

**Mail Stream:** the name of the mail stream that is blocked.

**IP:** The IP address within the mail stream that is blocked.

**Domain:** The name of the main that is blocking the mail stream.

**Blocking MX:** The IP address for the MX server that is blocking the mail stream.

**Description:** The reason for the blockage.

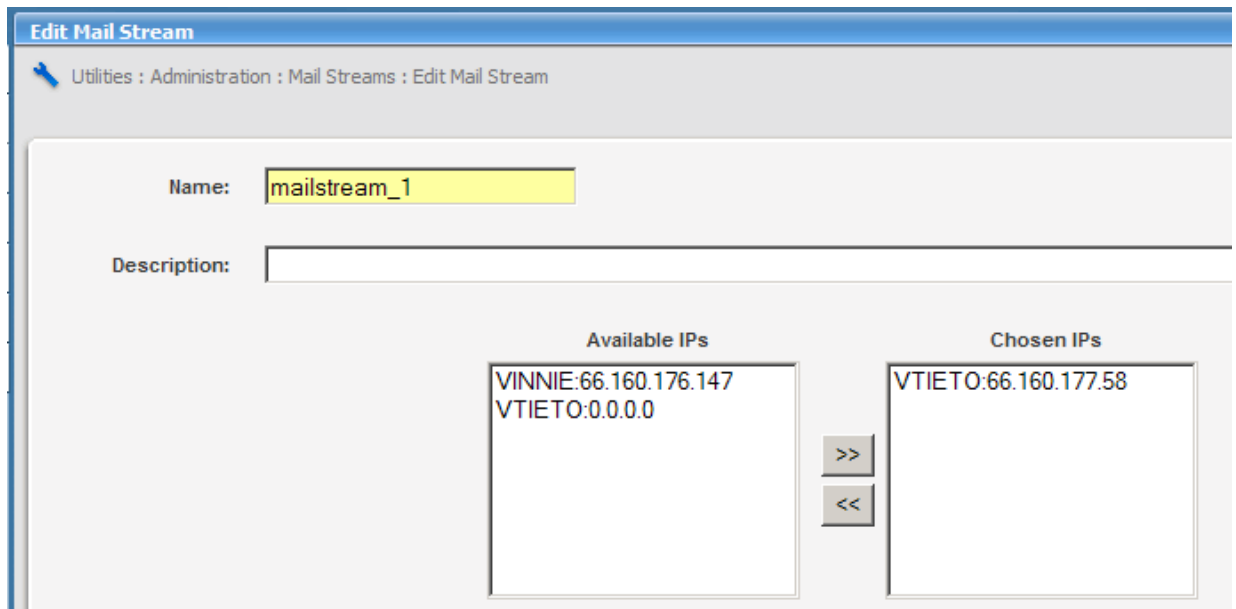
**Next Retry:** The date and time that another mail send will be attempted. If this column says Permanent, there are no more retries.

**Retry:** Click this command to try sending mail again.

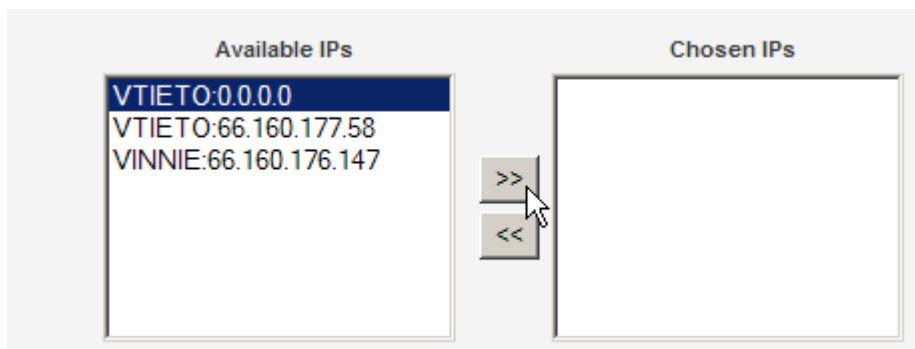
**NOTE** If an up/down arrow appears next to a column name, you can sort the list by that column. To do so, click the arrow.

## Choosing Mail Stream Properties

This page appears when you create, edit, or copy a mail stream.



1. In the **Name** field, type a name.
2. In the **Description** field, type a description.
3. In the **Available IPs** box, select the IP(s) you want to include in the mail stream, and then click the right arrow button.



**NOTE** To select several IP addresses at one time, hold the CTRL key down while you click the ones you want. To select several consecutive addresses, click the first one in the group, and then while holding down the SHIFT key, click the last one in the group.

4. To remove one of the chosen IPs, click the name in the **Chosen IPs** box, and then click the left arrow.
5. When you are finished, click the **Save** button.

# Using Specific IP Addresses in Mail Streams

---

When versions of ListManager prior to 10.0 are upgraded to ListManager 10.0 (or later), the IPs associated with each site are turned into [mail streams](#). By default, each site before version 10.0 was assigned **INADDR\_ANY (0.0.0.0)**, which lets the operating system choose the outgoing IP address). The INADDR\_ANY option (displayed as "(any)" in the **Outgoing SMTP IP address** dropdown) could then be re-assigned to a specific IP address on the host for outbound sending. During upgrade, any site still assigned to **(any)** for outbound connections will be assigned to the **default** mail stream, which uses 0.0.0.0 (operating system choice).

At sending time, ListManager records the actual local IP address it was using for each connection to a remote server. Blocks recorded when using the IP address 0.0.0.0 are saved using the true IP address on the local host. However, since it can change over time, ListManager has no way to know which local IP address 0.0.0.0 will resolve to. For this reason, blocks do not work as effectively with mail streams using 0.0.0.0, so we recommend that all mail streams use specific (one or more) IP addresses instead of 0.0.0.0.

## Billing

### Billing

---

The ListManager Billing System allows you to assign lists to customers and bill them for their ListManager usage via email. Even if you do not bill your users, the billing system allows you to monitor usage of your servers, search for lists or administrators, and delete members across all servers.

The instructions for billing assume that you have at least two ListManager servers: the *billing server*, used to monitor and bill customers, and the *hosting server*, the server that actually hosts customer lists. You may have multiple hosting servers, as long as they and the billing server have been set up to communicate with one another. It is also possible to have just one server, so that you are running billing on the same server that hosts customer lists.

In order to use ListManager's Billing System, you must first perform the following steps.

1. [Set up your server\(s\) for billing](#), so that your billing server can communicate with your hosting servers.
2. [Add, validate and sync your servers](#), so the information in your billing server is in sync with that in your hosting servers.
3. [Create hosting plans](#), which determine how much customers are going to be charged for their usage of your servers.
4. [Create any additional charges](#), such as list setup fees.
5. [Create customers](#), with information on how they should be billed.
6. [Create billing groups](#) for each customer, that allow you to assign a hosting plan and lists to a customer.
7. [Assign hosting plans, charges and lists](#) to your customers.
8. [Validate customers](#), to make sure there are no problems with their records.

Once you've taken these preliminary steps, you may run and send bills:



1. [Run the bills](#), which creates a bill for selected customers (but does not send them).
2. [Test and send the bills](#) to customers.

## Billing Initial Setup

---

These steps MUST be performed before running billing.

### 1. Creating the Billing Tables

The tables used by ListManager for billing are not created by default when you install ListManager. You must run a command line function to create them.

1. Shut down ListManager.
2. Open a command prompt.
3. Cd to they\  
ListManager directory.
4. Run the following command:

```
lm dbbillingcreate
```

ListManager will create all of the tables necessary for billing. **WARNING:** Do not run this command if you have billing tables already, or you will delete your existing data.

5. Restart ListManager.

### 2. Creating a Billing Admin and Customer Type Options

This administrator name and email address will be the default From: for invoices. The Customer Type is informational and will be used when you create a new customer.

1. On the billing server, go to [Utilities: Administration: Server: Server Settings: Advanced: Billing](#).
2. Enter the email address you'd like to appear as the From: for invoices in **Billing Admin Email**.
3. Enter the name you'd like to appear in the From: for invoices in **Billing Admin Name**.

4. Enter a type (e.g., Hosting) in **Customer Type Options**.

5. Save.

### 3. Creating a Billing List

You'll need to create a list on the billing server that will send out the bills.

1. Click on **New List** on the **Home** tab (under **Shortcuts**).

2. Select **Email Marketing** for **Purpose of List**.

3. Enter *billing* as the **List Name** and **List Description**.

4. Enter the **Admin Name**, **Admin Email Address** and **Admin Password**.

5. Save.

### 4. Requesting Delivery Reports

It's a good idea to request delivery reports, so you can correct your customers' email addresses if necessary.

1. Go to [Utilities: List Settings: Basic Information: Reports](#).

2. Select **Report After Forty-Eight (48)** hours.

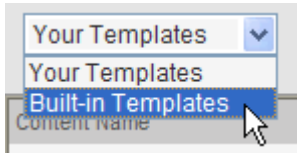
3. Click **Save**. The list admin for the billing list will now receive delivery reports about undeliverable invoices.

### 5. Creating Invoice Content

You'll need to create an email and web invoice in Content to be sent out and to be viewable over the web.

1. In the left Navigation bar, click **Content**.

2. Click **View Content**, and then click the **Create from Template** button.
3. Click the drop-down box that currently displays **Your Templates**, and then choose **Built-in Templates**.



4. Click the Select command for **Sample: Billing Email Invoice**.
5. Enter *email-invoice* as the **Content Name** and "Email Invoice" as the **Description**.
6. Click **Save**.
7. Repeat the process, but select **Sample: Billing Web Invoice**, with *web-invoice* as the **Content Name**.

We recommend you edit these invoices later so that your company logo and information appear on them.

## Adding, Validating and Syncing Servers

This topic explains the process of connecting the billing server to the hosting server(s).

### Hosting Servers

#### **Make Your Hosting Servers Save Billing Information**

The ListManager Billing System keeps track of your hosting servers' activity by reading the logs. Therefore, it is important that the hosting servers are keeping logs.

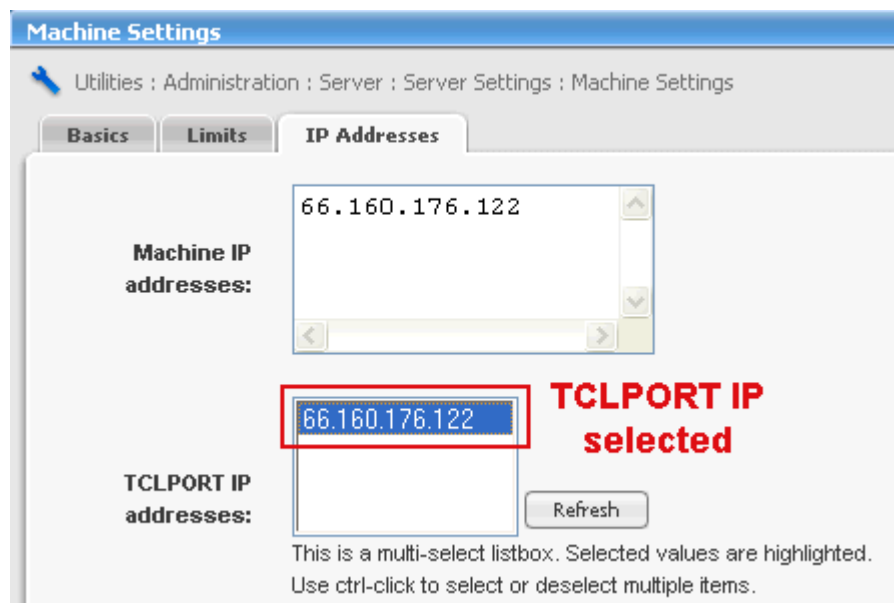
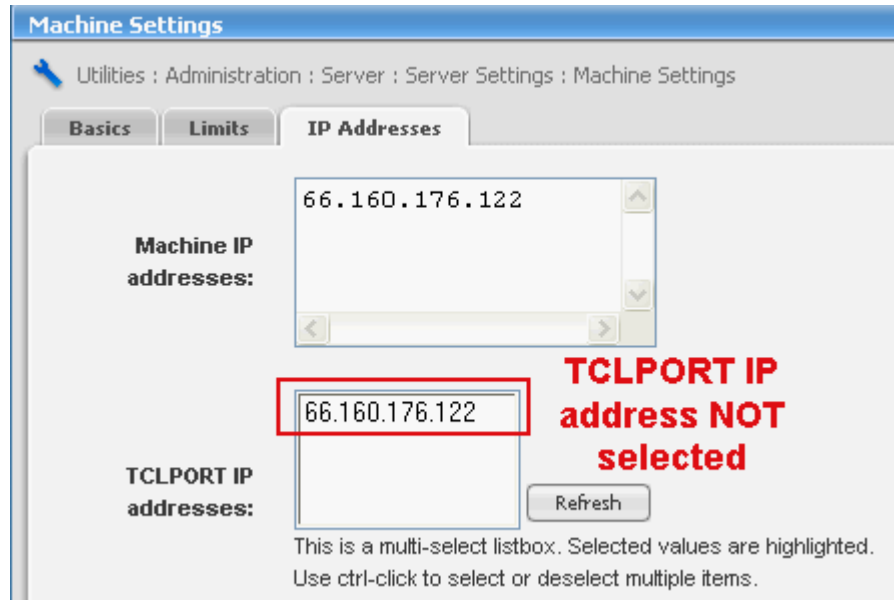
1. Log into ListManager on one of your hosting servers.
2. Go to [Utilities: Administration: Server: Server Settings: Automatic Maintenance: Logging](#).
3. Set **Enable Logging** to **Yes, Log All Messages that ListManager Sends to Mailing Lists**.
4. Click **Save**.

#### **Connecting Your Hosting Servers to Your Billing Server**

## Specifying the TCLPORT IP Address

By default, ListManager will only listen to the loopback address (127.0.0.1). You may specify that ListManager accept connections on other IP addresses. If you need to have other servers be able to connect to ListManager for scripting, you will need to specify the machine's IP address here.

You can select one or more IP addresses to connect to ListManager via TCLPORT from a remote server.



To select a TCLPORT IP address

1. In the left Navigation bar, choose **Utilities : Administration : Server : Server Settings : Machine Settings**.
2. Click the **IP Addresses** tab.
3. Highlight the address in the **TCLPORT IP addresses:** window.
4. Click **Save**.
5. ListManager must be stopped and restarted to activate this change.

If you only have one server, and you are running billing on that server, you may skip down to **Creating Hosting Servers in Your Billing Server**. Otherwise, you must configure your other servers so your billing server can communicate with them. Note that the billing server must be able to talk to your other servers on port 2021.

### **Connecting Your Billing Server to TCLPORT**

1. Log into ListManager on one of your hosting servers.
2. Go to [Utilities: Administration: Server: Server Settings: Security: GUI Hosts](#).
3. [Enter the TCP/IP address](#) of your billing server in **TCLPORT Hosts**.
4. Click **Save**.
5. Repeat for each server you'd like to be able to monitor or bill.

### **Billing Server**

#### **Creating Hosting Servers in Your Billing Server**

When you add a new server to your list hosting network, it will need to be created in the billing server.

1. Go to **Utilities: Administration: Billing: Servers**.
2. Click on *create new server*.
3. Enter a **Name** for the server (e.g., Lists).
4. Enter the server's **Host Name** for the server (e.g., lists.example.com or the TCP/IP address).
5. Enter any **Comments** you'd like to record for this server.
6. Click **Save**.
7. Repeat for each server you'd like to be able to monitor or bill.

#### **Validating and Syncing Servers**

Servers must be validated and synced before almost any changes can be made in the billing system.

Validation compares all information on the billing server with the hosting servers. If any differences appear, the information in the billing system needs to be updated. Once you have validated a server, the Validated field will be updated, as well as Version information.

Sync resolves any inconsistencies between the billing server and the hosting servers. Any time a change is made on a hosting server, sync will need to be performed so that the billing system can be updated with the new server information.

## Validating all Servers

1. Go to **Utilities: Administration: Billing: Servers**.
2. Click on **Validate All Servers** to validate all of your hosting servers.
3. If validation is successful, click on OK. If not, see Validation Errors (below).

## Validating Selected Servers

1. Go to **Utilities: Administration: Billing: Servers**.
2. Select the servers you'd like to validate by clicking on the box next them..
3. Click on **Validate Selected Servers**.
4. If validation is successful, click on OK. If not, see Validation Errors (below).

## Auto-Sync

Select this to ensure that any time a change is made on a hosting server, the billing system is automatically updated with the new server information.

## Validation Errors

### Errors Were Found, Click Here to Fix

Your billing server does not have information it needs to perform billing. Most likely, there are lists that are not assigned to a customer, or a customer has more lists or members than is permitted by their package.

To correct these errors, click on **Click Here to Fix**. You will be taken to a page that will display the errors. To correct them, click *fix selected objects*. Doing so will make an entry for these lists, sites or servers in your billing database tables. You may then assign an owner or perform other tasks once these objects are fixed.

# Working with Hosting Plans

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Each customer or list must have a hosting plan, which determines the amount they are charged for the use of your ListManager server. On the Hosting Plans page, you can view, edit, copy or delete an existing plan, or create a new plan.

### To edit a plan

In the **Name** column, click the name of the plan.

### To view the details of a plan

Click the **Detail** command for the plan.

### To copy a plan

1. Click the **Copy** command for the plan.
2. In the **New Name** box, enter the name you want for the new plan.
3. Click **Copy**.

#### To delete a plan

Click the **Delete** command for the plan.

#### To create a new plan

Click the **Create New Hosting Plan** button.

## Creating Hosting Plans and Charges

---

#### To Create Hosting Plans:

1. Go to **Utilities: Administration: Billing: Hosting Plans**.
2. Click *create new hosting plan*.
3. Enter a **Name** and **Description** for this hosting plan. Users will see the Name and Description on their invoice.
4. Specify whether there should be limits on the plan:

**Max Members** - Limits the number of members allowed for the entire plan. The default 0 allows unlimited members.

**Max Members Per List** - Limits the number of members per list on this plan. The default 0 allows unlimited members per list.

**Max Lists** - Limits the number of lists allowed on this plan. The default 0 allows unlimited lists.

**Max Lists Per Site** - Limits the number of lists per site on this plan. The default 0 allows unlimited lists per site.

**Max Sites** - Limits the number of sites on this plan. The default 0 allows unlimited sites.

5. Select whether or not to **Bill by List**. If Yes, the Monthly Price, Included Messages and Included Bandwidth apply to each list individually.
6. Select the **Billing Method**:

**Standard** - The customer is charged by the number of messages sent.

**Bandwidth** - The customer is charged by the total amount of mail sent (bandwidth).

7. Click the **Refresh** button. Depending on the Billing Method, you will see the following options:

**Monthly Price** - A set fee for this plan.

**Overage CPM** - The cost per thousand messages (CPM) that exceeds the Included Messages.

**Included Messages** - The number of message units included in a plan. The size of a message unit is determined by your setting for Max Message Size.

**Max Message Size** - The size of a message unit, in kilobytes. Messages larger than this size are counted as more than one message.

For example, if your Max Message Size was 10 (10 kilobytes), and a customer sent a single message that was 12,288 bytes in size, they would be charged for 1.2 messages. If this message was sent to one hundred recipients, they would be charged for 120 message units.

**Monthly Price Per Server** - The set fee per month for a server. Billing by Bandwidth can only be done per server.

**Cost Per GB** - The cost per gigabyte (GB) sent per month. If the customer exceeds the Included GB, they would be charged this rate per GB.

**Included GB** - The number of gigabytes (GB) included in this plan before additional charges apply.

8. Click **Save**.

## Creating Additional Charges

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ListManager allows you to bill for additional charges as well. For instance, you may want to charge customers for an initial setup fee. You also use additional charges to account for prepaid accounts.

1. Go to **Utilities: Administration: Billing: Additional Charges**.
2. Click *create new additional charge*.
3. Enter a **Name** and **Description** for this additional charge.
4. Enter the charge's **Default Amount**.
5. Select whether or not the charge **Is Recurring?**, meaning should this charge be added every month. For example, an initial setup fee would be a single time charge.
6. Select whether or not the charge **Is Proratable?**, meaning should this charge be prorated. For example, a setup fee would not be proratable, whereas a service begun at a certain time might be.
7. Click **Save**.



## Prepaid Accounts

Additional Charges are used to account for prepaid accounts. For example, if someone prepaid \$100, you would create a non-recurring, non-proratable additional charge of - \$100.

# Creating and Editing Customers

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Make sure that [servers have been validated and synched](#) prior to entering new customer information, in order for new servers and lists to appear in the billing system.

1. Go to **Utilities: Administration: Billing: Customers: Configure**.
2. Click create new customer.

The **New Customer** page appears with four tabs. Click each tab and add the information described below.

### Basic Information tab

1. Specify whether the customer **Is Active**.  
[Learn more about making a customer inactive](#).
2. Enter contact information about the customer:

**Company**

**P.O. Number**

**Vendor Number**

**Contact Name**

**Email Address:** This address will receive invoices.

**Additional Addresses:** Any additional email addresses that you wish to send invoices.

**Email Invoice Template:** Click this box, and then choose the template you created when you [set up Billing](#).

**Web Invoice Template:** Same as above.

### Payment Information tab

1. Specify a **Payment Method** for this customer:

**Free:** This customer does not pay for your services.

**Invoice:** This customer receives an invoice, and pays by money order or check.

**Credit Card:** This customer pays by credit card. Credit card information may be entered in the **Payment Information** tab.

2. Enter **Payment Method Notes** (optional).
3. Enter the cardholder's name, address, city, state, Zip code, and country.
4. Click the **Use AVS** box and choose one of the options. AVS (Address Verification Security) ensures that if the credit card billing address does not match the address on this page, payment is not made.
5. If you chose "Credit Card" as the payment method, enter the credit card number and expiration information.

### Information Tab

1. In the **Customer Information** box, enter any additional information you would like to have on record for this customer.
2. Enter a **Phone Number** and **Extension**.

### Additional Settings

1. Enter the **Start** and **End Date**, if applicable.
2. Enter the **Salespeople** responsible for this account, if applicable.
3. Enter a note that you would like to be included in your invoices to customers.

When you are finished entering information in the tabs, click the **Save** button.

**NOTE** After you create a customer, you must create at least one [billing group](#) for the customer.

## Creating Billing Groups

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Once you've created a customer, you must create a billing group for them. If a customer has one contract, they will have only one group. If you have different contracts for the same customer, the lists will be grouped under the different contract plans.

1. Go to **Utilities: Administration: Billing: Customers: Configure**.
2. Click on **Groups** in a customer's row.
3. Click the **Create New Group** button.
3. Give the Group a **Name**.
4. Click **Save**.

## Assigning Hosting Plans, Charges and Lists

Once you've created your hosting plan, additional charges, a customer and a billing group, you are ready to assign hosting plans, additional charges and lists to a customer.

### **Assigning Hosting Plans**

1. Go to **Utilities: Administration: Billing: Customers: Configure**.
2. Click on **Groups** next to a customer.
3. Select **Hosting Plans** next to the group. [Create a new group](#) if you don't see a group here.
4. Click on **Add Hosting Plan**.
5. Enter a **Start Date** and/or an **End Date**, if applicable, in YYYY-MM-DD format.
6. Enter a **Description** (if desired).
7. Click on **Select** next to the Hosting Plan you'd like to assign.
8. Click **Done**.

### **Assigning Additional Charges**

1. Go to **Utilities: Administration: Billing: Customers: Configure**.
2. Click on **Groups** next to a customer.
3. Select **Additional Charges** next to the group. [Create a new group](#) if you don't see a group here.
4. Click on **Add Additional Charge**.
5. Enter a **Start Date** and/or an **End Date**, if applicable, in YYYY-MM-DD format.
6. Enter a **Description** (if desired).
7. Click on **Select** next to the Additional Charge you'd like to assign.
8. Click **Done**.

### **Assigning Lists, Sites and Servers**

1. Go to **Utilities: Administration: Billing: Customers: Configure**.
2. Click on **Groups** next to a customer.
3. Select **Lists** next to the group.
4. Click on **Add List/Site/Server**.
5. To assign a list to the customer, click **Select Lists** next to the server. Click on the box next to the list name(s) and click on **Add Selected Lists**.
6. To assign a site to the customer, click **Select Sites** next to the server. Click on the box next to the site name and click on **Add Selected Sites**.
7. To assign the entire server to the customer, click on the box next to the server name and click on **Add Selected Servers**.
8. Select the server, site, or list to update, if applicable.
9. Enter a **Start Date** and/or an **End Date**, if applicable, in YYYY-MM-DD format.
10. Specify whether or not the server, site or list **Is Free**, if applicable.
11. Click **Update Selected Objects**.
12. Click **Done** twice to return to the **Utilities: Administration: Billing: Customers: Configure** menu.
13. Click **Detail** next to the customer to verify the information for the customer.

### Assign List Wizard

Alternatively, you can use the Assign List Wizard to assign lists to customers quickly and easily.

1. Go to **Utilities: Administration: Billing: Utilities: Assign Lists to Customers**.
2. Select the server in the drop-down box, and click **Select**.
3. Select the **Customer** in the drop-down box.
4. Select lists in the field below. Use a mouse click with the control key to select multiple lists, and a mouse click with the shift key to select a range of lists.
5. Click **Assign Lists to Customer**.

## Validating Customers

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All customers should be validated periodically to check for errors in their accounts. A good time to do this is just before each billing cycle. To do so:

1. Go to **Utilities: Administration: Billing: Customers: Configure**.
2. Click **Validate all Customers**.
3. A report will be generated showing any customer accounts that have errors (e.g., customer has no lists assigned; or no expiration date for credit card).
4. Click **Edit** to change the customer information.

## Running Bills

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Before you send out bills, you must run them, meaning you need to have ListManager generate the bills.

By default, Utilities: Administration: Billing: Customers: Bill shows all of your customers. Unless you want to bill everyone (including inactive customers), you'll want to use the Search box to find the customers you want to run bills for.

### **Generate Invoices for Currently Active Customers**

Generally, you'll want to generate invoices only for customers who are currently active.

1. Go to **Utilities: Administration: Billing: Customers: Bill**.
2. Select **Active Before** in the **Search** drop-down box.
3. Enter the last date of the billing period in the entry box in YYYY-MM-DD format.
4. Click **Go**.
5. Click **Bill All in View** to just bill those customers you selected. You will be taken to **Utilities: Administration: Billing: Customers: Bill: Run Billing**.
6. Confirm that the Start and End Dates at the top of the page are correct, and edit if necessary.
7. Click **Run All Customers** to run billing for all customers. Or, select the customers for whom you'd like to run bills, and click **Run Selected Customers**.
8. Click **OK**.
9. View an invoice for a particular customer by clicking on it under the **Last Bill Period** column or the **Amount/Status** column.
10. Click **Done**.

### **Generate Invoices for Selected Customers**

1. Go to **Utilities: Administration: Billing: Customers: Bill**.
2. Select the customers for whom you'd like to run bills by checking them.
3. Click **Bill Selected Customers**.

### **Searching for Customers to Bill**

The following options are available from the Search drop-down box:

#### **All Customers**

All customers entered in billing.

#### **Active Customers**

All customers designated as active (in [Utilities: Administration: Billing: Customers: Configure: Basic Information](#)).

#### **Inactive Customers**

All customers designated as inactive (in [Utilities: Administration: Billing: Customers: Configure: Basic Information](#)).

#### **Start Date After**

All customers whose start date is after the date specified in [Utilities: Administration: Billing: Customers: Configure: Additional Settings](#). Specify the date in the entry box in YYYY-MM-DD format.

**Active Before**

All customers who became active before a certain date. For example, if your billing period is from the first of the month but you run billing on the fifth, you want to only bill customers who were active for the billing period. If you have added new customers before that time, you would want to select for only those customers who were active before the first so you don't bill those who were added later. Specify the date in the entry box in YYYY-MM-DD format.

**Bill Amount Is Greater Than**

All customers whose bill is greater than the amount specified in the entry box.

**Bill Overage Amount is Greater Than**

All customers whose overage (messages sent in excess of what is included in their hosting plan) is greater than the amount specified in the entry box.

**Last Modified After**

All customers who were modified after a particular date (in [Utilities: Administration: Billing: Customers: Configure](#)). Specify the date in the entry box in YYYY-MM-DD format.

**Customer Is on Server**

All customers on a particular server. Specify the server in the entry box.

## Testing and Sending Bills

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Testing bills generates a copy of each invoice for your files. *Sending* the bills transmits a copy of the invoice to the customer via email.

**Viewing Bills**

Go to **Utilities: Administration: Billing: Customers: Send**.

1. Click on the value in the **Amount/Status** column for the bill you'd like to view.
2. Alternatively, click **View** on the row you'd like to view.

**Testing Bills**

A test creates the bill for the customer, but mails it to the Test Email Address specified here. *Do not be alarmed if you receive a bill addressed to someone else!* ListManager creates the bill for the recipients, but redirects it to you. You will receive exactly what your recipients will receive in your email box, so you can see if your bill looks the way you want it to. The bill has *not* been sent to your list, or to the customer whose email address is on your test message, until you select Send Bills.

1. Go to **Utilities: Administration: Billing: Customers: Send**.
2. By default, the addresses will be filled in with the values you entered in Utilities: Administration: Server: Server Settings: Advanced: Billing. If you would like to change them, enter them here:

**From Name**

The name of the person from whom the bill should appear to be coming.

**From Email Address**

The email address of the person from whom the bill should appear to be coming.

**Test Email Address**

The email address which should receive test messages.

**Message Bounce Email Address**

The email address which should receive mail that permanently failed. If a bill bounces, the customer has not received it. Being informed of permanent failures lets you know you need to contact the customer and update their information.

**Tcl Error Notify Email Address** - The email address which should receive notification if something goes wrong with the bill.

3. Enter the **Message Comments (Text)** and **Message Comments (HTML)**, if applicable.
4. Select the bills you'd like to test by checking the box next to them.
5. Click **Test Selected Bills**. Or, click **Test All Bills** if you'd like to see what every bill will look like. **WARNING:** You will receive a copy of each and every bill if you test all bills! Depending on how many customers you have, that may be a great deal of mail.

**Sending Bills**

Go to **Utilities: Administration: Billing: Customers: Send**.

1. By default, the addresses will be filled in with the values you entered in Utilities: Administration: Server: Server Settings: Advanced: Billing. If you would like to change them, enter them here:

**From Name**

The name of the person from whom the bill should appear to be coming.

**From Email Address**

The email address of the person from whom the bill should appear to be coming.

**Test Email Address**

The email address which should receive test messages.

**Message Bounce Email Address**

The email address which should receive permanent failures. If a bill bounces, the customer has not received it. Being informed of permanent failures lets you know you need to contact the customer and update their information.

**Tcl Error Notify Email Address** - The email address which should receive notification if something goes wrong with the bill.

2. Enter the **Message Comments (Text)** and **Message Comments (HTML)**, if applicable.
3. Select the bills you'd like to send by checking the box next to them.
4. Click **Send Selected Bills**. Or, click **Send All Bills** if you'd like to send every bill.

**Deleting Bills**

Bills that are sent or filed disappear from this view. If you'd like to delete all bills, click **Delete All**.

### **Filing Bills**

Bills that are filed will show in a customer's history, but are not actually sent.

## **Terminating Customers and Lists**

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In most cases, when a customer has cancelled their account, a final bill should be run and sent. Once the final bill has been sent, the account and lists should be terminated in billing.

### **Sending a Final Bill to Customers**

1. Go to **Utilities: Administration: Billing: Customers: Configure**.
2. Open the Edit Customer page by clicking on the name of the customer.
3. Click the **Additional Settings** tab.
4. Enter the End Date of the customer. Setting the End Date will prorate the last invoice for the appropriate amount of days service was provided.
5. After generating the final invoice for the customer, be sure to terminate the customer so that no more bills can be generated for them.

### **Terminating Customers**

Once you've sent a final bill to canceling customers, you must terminate them in billing so no more bills may be run for them.

A customer may be terminated in two ways: making them inactive, or by deleting them. Making a customer inactive is preferable, as it prevents bills from being generated for them but preserves the customer information, including billing history, that you may need at a future time. If the customer returns, you need only reactivate them. Deleting a customer removes them and all history about them from billing.

### **Making a Customer Inactive**

Go to **Utilities: Administration: Billing: Customers: Configure**.

1. Click on the name of the customer to open the **Edit Customer** page.
2. Select **No for Is Active** on the **Basic Information** tab.
3. Click **Save**. You will be returned to the Configure page.
4. Click on **Groups** next to the terminated customer.
5. Click on **Lists**.
6. Check all lists, sites and servers on the left and click on **Remove Selected Objects**.
7. Confirm that you want to **Remove Selected Objects**.
8. Click on **Done**.
9. [Terminate the customer's lists](#) if they have not been deleted from the server.



# Terminating Lists

---

When a customer leaves, or cancels a list, it must be terminated in billing as well. Lists must also be terminated in billing if a list is moved from one server to another, or renamed.

There are two ways of terminating a list: deleting it from the server directly, or keeping it but assigning it to a fake customer named "Terminated" or "Need to Delete" in billing.

It is preferable to assign terminated lists to a fake customer, because all the list information is preserved, and the list can be reinstated easily if the customer changes their mind. If the customer needs their membership, the data is still available. Once a list is deleted from the server, membership data is gone.

## Deleting a List

Log into the server where the list to be deleted is.

1. Go to [Utilities: Administration: Lists](#).
2. Click **Delete** next to the list to be deleted.
3. Log into the billing server.
4. Go to **Utilities: Administration: Billing: Servers**.
5. Select the server from which you deleted the list
6. Click on **Validate Selected Servers**.
7. Click *fix selected objects* when prompted.

## Terminating a List Without Deleting It

If an inactive customer has lists assigned to them, you will receive an error message when customer validation is performed. To prevent that from happening, create a fake customer called "Terminated" for those lists and move them to it.

1. Create a "Terminated" customer account which is inactive, with a "Terminated" group. See [Creating New Customers](#) for step-by-step instructions.
2. Go to **Utilities: Administration: Billing: Customers: Configure**.
3. Click on **Groups** next to the terminated customer.
4. Click on **Lists**.
5. Check all lists, sites and servers on the left and click on **Remove Selected Objects**.
6. Confirm that you want to **Remove Selected Objects**.
7. Click on **Done**. The lists are now not assigned to any owner. They need to be assigned in order to prevent errors during validation reports.
8. Go to **Utilities: Administration: Billing: Utilities: Assign Lists to Customers**.
9. Select the server that has the terminated lists on it
10. Select the unassigned lists.
11. Select the "Terminated" customer.
12. Click on **Assign List to Customer**.
13. Click **Done**.

# Billing Checklist

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The following is a checklist of steps you should take every time you run bills.

1. [Validate and sync](#) your servers with the billing server.
2. Check that all lists have been [assigned to customers](#) or to fake accounts.
3. If you have customers who have prepaid, set the [Carry-Over Remaining Credits](#).
4. [Run the bills](#), creating a bill for each customer.
5. [Test and send the bills](#).
6. [Terminate any customer](#) who should not receive future bills.
7. [Terminate lists](#).

# Billing Reports

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The Utilities: Administration: Billing: Billing Reports page is a useful tool for finding lists, sites and servers.

The first drop-down box gives you the following options:

**Show All**

Show everything that meets your criteria.

**Show Contains**

Show lists, sites or servers which contain the text you specify in the entry box.

**Show Exact**

Show lists, sites or servers which match the text you specify in the entry box exactly.

The second drop-down box gives you the following options:

**All**

All lists, regardless of whether or not they are owned by a customer.

**Owned**

All lists owned by a customer.

**Unowned**

All lists not owned by a customer.

The third drop-down box gives you the following options:

**Lists**

Search all list names.

**Sites**

Search all site names.

### **Servers**

Search all server names.

The entry box allows you to specify text your search should match or contain.

## **Billing Utilities**

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Billing utilities help you to perform tasks needed to maintain your billing system or to find particular members.

### **Assign Lists to Customers**

This wizard helps you to quickly assign lists to customers you have already [created](#).

### **Find Administrator**

This utility helps you to find an administrator on any of your servers. Enter an email address or name in the entry box, and click OK to search for an administrator who matches. You may specify multiple administrators by separating them with the | character.

### **Find Member**

This utility helps you to find a member on all lists on your servers, and delete them if desired. Enter an email address or name in the entry box, and click OK to search for a member who matches. Check **Delete Them** if you'd like to delete the address.

### **Carry-Over Remaining Credits**

This utility is used if you have prepaid customers. You would create a non-recurring, non-proratable charge, and give it a negative number that correlates to how much someone prepaid. You would next assign that charge to the customer, with the correct amount they prepaid. For example, if they prepaid a hundred dollars, you would enter -100.00 for the charge.

Before each billing cycle, you would enter the date of the previous billing start date, in YYYY-MM-DD format. For example, if you are billing for January, you would enter 2002-12-01. Next, select a charge for all customers' prorated charges to be grouped under.

### **Change Admins**

### **Forwarding Orders**

**IMPORTANT** Do not use either of the above features; they have been disabled and will generate an error.

### **Export Invoice Data**

Allows you to download a CSV (comma separated values) file for your invoices. Select the invoice start date (YYYY-MM-DD format), the customer type, and the fields to export. You will be prompted to save the CSV file in any location.

## Viewing a Customer's History

---

To obtain a billing history for a customer:

1. Go to **Utilities: Administration: Billing: Customers: Bill** and **Search** for the customer.
2. Click **History** for that customer. You can now access all invoices that have been generated for that client.

## Login Status

### Utilities: Login Status

---

#### Log Out

After clicking on Log Out, you'll need to log in again to access ListManager.

For security reasons, we recommend that you close all browser windows after logging out of ListManager.

#### Change Login

If you'd like to log in as a different user, you may either Log Out and Log In again, or Change Login. If you click on Change Login, you will have the opportunity to log back in again immediately.

#### Change List

If you'd like to change the list you're working on, click on Change List. The next screen will give you the option to change the list you're working on.

#### Change Language

The Change Language page lets you change the current language of the web interface for your administrator account. For more information on this, see [Utilities: Login Status: Change Language](#).

#### Your Account

If you'd like to see your settings, click on Your Account. You will be taken to the list, site or server view administrator page.

#### Change Node

To change which node you are working on, click on the Node name in the upper right hand corner of the administrators' interface. Note that the Node Name will not appear if you are not running ListManager in a clustered environment.

## Utilities: Login Status: Change Language

---

The Change Language page lets you change the current language of the web interface for your administrator account. This setting is currently cached in the ListManager server, which means that if the server is restarted, you may have to set your language again.

To change the language, click on the Select link or on the language name itself. The ListManager interface will then be visible in the selected language. Note that the associated character set for each language is also displayed.

[International Character Sets](#)

[Setting the default language](#)

## Other

### Utilities: Other

---

On the Utilities: Other page, you can access these features:

[Action Tags](#): Allow you to track recipient movement through your site.

[Offline Events](#): Tracks actions a user makes offline, such as by telephone.

[Clickthrough URLs](#): Allows you to edit clickthrough URL descriptions.

[About](#): Learn more about ListManager and its maker, Lyris Technologies, Inc.

### Utilities: Other: Action Tags

### Utilities: Other: Action Tags

---

Action Tags allow you to track recipient movement through your Web site. On the Utilities: Other: Action Tags page, you can access these various methods of creating action tags :

[Clickstream Tags](#): Insert these in the source code of web pages on your Web site. If you enable clickstream tracking, you can see how many pages your mailings' recipients have visited.

[Purchase Tags](#) and [Interest Tags](#): Record information in your ListManager database about recipients' purchase behavior or interest in a product.

[Member Update Tags](#): Update information about a member when they visit a particular page.

### **How Action Tags Work**

Action tracking relies in part on *cookies* — tiny pieces of information stored on a list member's Web browser. When list members click on a clickthrough tracking link, ListManager gives their browser a cookie. This cookie allows ListManager to recognize list members when they subsequently make a purchase, as well to track the most recent mailing clicked on.

An actual Action Tag is a line of HTML code that call an "invisible gif" — a tiny, 1-pixel by 1-pixel graphical image. Typically, this image is white, making it effectively invisible to the list member. When this invisible gif appears on a page viewed by a list member or is otherwise activated, your web server sends ListManager information about the action completed by that list member.

Note that the data passed from your Web server to ListManager via the Internet is merely a series of numbers. These numbers contain no personally identifiable information and are thus unintelligible to outsiders or "snoopers." Only ListManager can interpret this data, which means that only list administrators with appropriate access rights can view these purchases.

Your ListManager server must always be on and connected to the Internet to track actions correctly. Note also that if an individual list member's browser is configured to reject cookies, ListManager will not be able to link an action with that list member.

Alternatively, Action Tags can be created without cookies mostly for text based messages. It puts the memberid and messageid in the destination url. It gets tracked in the LM database and also in the receiving web server.

### **Important Note: Third Party Cookies**

You should use the same domain name (with a different host name) for ListManager as you use for the site you are tracking. If they are not the same, some visitors may receive warnings about third party cookies, and you may not get accurate data about visits.

For example, if the action tag refers to your ListManager server, lists.example.com, but your site is www.example1.com, people who click through from your mailing to your website may receive a warning about third party cookies. The solution is to create a DNS entry for lists.example1.com that refers back to your ListManager server, and to use that domain for your action tags.

A [P3P policy](#) can also be implemented to allow third party cookies to work properly.

## Utilities: Other: Action Tags: Clickstream Tag

---

The Clickstream Tag page allows you to create a clickstream tracking tag. If you place this tag on a page in your website, and recipients of your message click through on a tracking link to that page, the event will be recorded by ListManager. Enter a name to help you identify this tag, click **OK**, and ListManager will provide you with the HTML for this Clickstream tag.

Copy the HTML and paste it into the source code of any web page you'd like to track. You must include some tracking in your message—clickthroughs, opens, or HTML detection—in order to track clickstreams.

See [Utilities: Other: Action Tags](#) for more information about how Action Tags work.

### Important Note: Third Party Cookies

You should use the same domain name (with a different host name) for ListManager as you use for the site you are tracking. If they are not the same, some visitors may receive warnings about third party cookies, and you may not get accurate data about visits.

For example, if the action tag refers to your ListManager server, lists.example.com, but your site is www.example1.com, people who click through from your mailing to your website may receive a warning about third party cookies. The solution is to create a DNS entry for lists.example1.com that refers back to your ListManager server, and to use that domain for your action tags.

## Utilities: Other: Action Tags: Purchase Tag

---

A Purchase Tag gives information back to ListManager about a recipient's purchase.

The resulting tag must be pasted in the source code for any web page you'd like to track message recipients' purchases. You must include clickthrough tracking in your message in order to subsequently track purchases.

Although you can use a Purchase Tag with static (unchanging) values for price, quantity, etc., you will likely want to make your Purchase Tags dynamic by using variables that your script or shopping cart application can then change based on a customer's order.

For example, let's say you want to record a customer's purchase on their order confirmation page. This static Purchase Tag will always show that the purchaser bought one unit of product/SKU 1234 for \$100.00:

```
<IMG SRC="http://example.com/pt?name=purchase&fields=UnitPrice ,  
Quantity ,ProductSKU &UnitPrice =100.00&Quantity =1&ProductSKU  
=1234" ALT=" HEIGHT=1 WIDTH=1">
```

To make the Purchase Tag dynamic, use variables instead of static values:

```
<IMG SRC="http://example.com/pt?name=purchase&fields=UnitPrice ,  
Quantity ,ProductSku &UnitPrice =$price&Quantity =$quantity  
&ProductSku_=$sku" ALT=" HEIGHT=1 WIDTH=1>
```

Your purchasing script or shopping cart application can then dynamically update these variables with information about the customer's purchase, which then is sent to ListManager. Please see your shopping cart application's documentation or consult with your purchase script's programmer for more information about how to use variable values in these tags.

Note that you should use multiple tags for multiple products.

See [Utilities: Other: Action Tags](#) for more information about how Action Tags work.

### **Name This Tag**

A single word to describe this tag.

### **Fields to Track**

By default, the tag will track Unit Price, Quantity, Product/SKU#, Interest Stage and Interest Points. If you would like to add or remove fields to track, click the **Choose Fields** button.

### **Unit Price**

The price of the unit purchased. You may want to enter a variable here (e.g., \$price) that a script on your web server can update with the correct unit price.

### **Quantity**

The quantity purchased. You may want to enter a variable here (e.g., \$quantity) that a script on your web server can update with the correct quantity.

### **Product/SKU#**

The product or SKU number. You may want to enter a variable here (e.g., \$sku) that a script on your web server can update with the correct quantity.

### **Interest Stage**

The stage of a customer's interest (e.g., browsing).

### **Interest Points**

The amount of points to assign to this customer. The higher amount of interest points, the more interest the customer is showing. Interest points can accumulate, depending on whether you have multiple purchase or Interest Tags.

### **Important Note: Third Party Cookies**

You should use the same domain name (with a different host name) for ListManager as you use for the site you are tracking. If they are not the same, some visitors may receive warnings about third party cookies, and you may not get accurate data about visits.



For example, if the action tag refers to your ListManager server, lists.example.com, but your site is www.example1.com, people who click through from your mailing to your website may receive a warning about third party cookies. The solution is to create a DNS entry for lists.example1.com that refers back to your ListManager server, and to use that domain for your action tags.

## Utilities: Other: Action Tags: Purchase Tag : Choose Fields

---

[Learn more about Purchase Tags](#)

The **Chosen Fields** box lists the default fields for your purchase tags. The **Available Fields** box lists fields that are available to you but have not yet been chosen.

### To add an available field to the Chosen fields list

1. In the **Available fields** box, click the field you want to add.
2. Click the Add arrow.



### To remove a field from the Chosen fields list

1. In the **Chosen Fields** box, click the field you want.
2. Click the Remove arrow.



**NOTE** You can [add additional fields](#) to the purchase tag.

## Utilities: Other: Action Tags: Interest Tag

---

An interest tag lets you gauge a recipient's level of interest, based on the pages they have visited.

Once you have selected the interest tag, click "ok" to generate the HTML for the tag. The resulting tag must be pasted in the source code for any web page you'd like to track message recipients' interest. You must include clickthrough tracking in your message in order to subsequently track interest.

Interest Tracking is a feature of ListManager Pro or Enterprise, and is unavailable for standard ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade ListManager.

Interest Tracking has three components:

Events  
Stages

## Points

*Interest Events* are actions that your list members take, such as clicking through to your Web site, viewing web pages, downloading material, submitting web forms, or making purchases.

*Interest Stages* are numerical values assigned to particular Interest Events to communicate the relative position of each Event within the sales cycle. Assuming an Interest Stage scale of 1 to 100, an Event such as a visit to a product page might be assigned a 30, whereas a purchase might be assigned a 90. Interest Stages thereby enable you to gauge how far your members have progressed towards demonstrating more interest in your business. The Interest Stage registered for each member will be the highest one they have visited—for example, if they purchased, and then browsed further on your Web site, their Interest Stage would still be for the higher purchase interest. You can customize the scale for Interest Stages to suit your needs.

*Interest Points* are numerical values assigned to particular Interest Events to communicate the relative importance of each Event within your sales cycle. Assuming a Points scale of 1 to 100, an Event such as visiting a product page may be assigned 3 Interest Points, whereas a request to be contacted by might be assigned 90 Interest Points. A returned product may be assigned a negative value. As your members complete various Events, they accumulate additional Points—enabling you to identify hot leads who deserve special treatment. You can customize the scale for Interest Points to suit your needs.

See [Utilities: Other: Action Tags](#) for more information about how Action Tags work.

### **Name of Interest Event**

Displays the event name. Click the *choose event* button, to see a list of some default interest tags that ListManager is shipped with. When you "select" one of these interest tags, it automatically inserts it into the interest tag page. From here the name, stage, and points can be modified prior to creating the tag (by clicking "ok"), or alternatively, this can be changed later in the HTML of the tag itself.

ListManager includes a series of default interest tags. These all have a designated tag name, interest stage, and interest points.

### **Interest Stage**

The stage of a customer's interest.

### **Interest Points**

The amount of points to assign to this customer. The higher amount of interest points, the more interest the customer is showing. Interest points can accumulate, depending on whether you have multiple purchase or Interest Tags.

### **Important Note: Third Party Cookies**

You should use the same domain name (with a different host name) for ListManager as you use for the site you are tracking. If they are not the same, some visitors may receive warnings about third party cookies, and you may not get accurate data about visits.

For example, if the action tag refers to your ListManager server, lists.example.com, but your site is www.example1.com, people who click through from your mailing to your website may receive a warning about third party cookies. The solution is to create a DNS entry for lists.example1.com that refers back to your ListManager server, and to use that domain for your action tags.

## **Utilities: Other: Action Tags: Member Update Tag**

---

A Member Update Tag updates a database field for a member. For example, if a customer visits a particular page with a contest on it, you may update a database field to indicate the customer is interested in contests.

The resulting tag must be pasted in the source code of any web pages that the message recipients will visit. With the tag in place, when a recipient visits that page, the tag will cause the ListManager database to be updated with the information in the tag. You must include some kind of tracking in your message—clickthroughs, opens, or HTML detection—in order to update a member in this fashion.

See [Utilities: Other: Action Tags](#) for more information about how Action Tags work.

### **Field Name**

The name of the field to update, from the ListManager members\_ table.

### **Value**

The value that should be updated to the field when a customer visits the page.

### **Create New Field**

If you'd prefer to create a field to store your member update information, you may create a new field. See [Utilities: Administration: Server: Database: Add/Remove Member Columns: Add Member Column](#) for more information.

### **Important Note: Third Party Cookies**

You should use the same domain name (with a different host name) for ListManager as you use for the site you are tracking. If they are not the same, some visitors may receive warnings about third party cookies, and you may not get accurate data about visits.

For example, if the action tag refers to your ListManager server, lists.example.com, but your site is www.example1.com, people who click through from your mailing to your website may receive a warning about third party cookies. The solution is to create a DNS entry for lists.example1.com that refers back to your ListManager server, and to use that domain for your action tags.

## **Utilities: Other: Clickthrough URLs**

---

When you create a [clickthrough URL](#), you may optionally assign it a name to assist you with reports. Once you have assigned a URL a name, it will continue to have that name until you rename it here.

The main Clickthrough URLs page displays the ID number, URL and name for each clickthrough URL you have created. Click on the URL to change the name associated with it.

You will be taken to a page which displays the ID number of the URL, the URL, and an entry box with the current name. To change it, enter a new Name, and click Save.

## Utilities: Other: Offline Events

---

ListManager can track what actions a recipient takes on your website automatically if you use action tags on your website. However, you may have situations where a user performs an action (such as making a purchase) offline, such as by telephone. Although this action was performed offline, you may still want it included in your ListManager database if it was the result of an email message.

Offline events will be included in any reports for that mailing, and may be used to create a triggered mailing. Note that each offline event can be associated with only one mailing. An identical offline event can be used for more than one mailing, but must be created individually for each mailing.

There are three types of offline events:

### **Offline Event**

Records an event for a member, with no additional information.

### **Offline Interest Event**

Records an event for a member, and allows [interest](#) stage and points to be assigned to the event.

### **Offline Purchase Event**

Records an event for a member, allows interest stage and points to be assigned to the event, along with additional [purchase](#) information.

Creating an offline event insert rows in the `clicktracking_` and `clickstreamdata_` tables, and can be viewed by going to the [Member History](#) page for an individual member.

Offline events are a ListManager Enterprise feature. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Enterprise.

To record an offline event:

1. Select the type of event you would like to create.
2. Enter the **Event Name**.
3. Enter the **Member Email Address** of the list member.
4. (Offline interest and purchase events only) Enter any additional information you would like recorded for the event such as interested stage or points.

5. Click **OK**. ListManager will record the event, and return a URL that may be used to create this event again.

### **Event Name**

Enter a descriptive name for your event, such as "phone call/date" or "purchased 10 units".

### **Member Email Address**

Enter the email address of the list member. ListManager cannot record offline events for email addresses that are not list members.

### **Mailing**

Select a mailing from the drop-down menu. The offline event will be associated with the mailing selected here.

### **Interest Stage**

Enter the interest stage for this event (available for offline interest and purchase events).

### **Interest Points**

Enter the interest points for this event (available for offline interest and purchase events).

### **Quantity**

Enter the quantity purchased. Quantity must be 1 or greater

### **Optional Fields**

Additional values (optional fields) may be added to an offline purchase event. available for Purchase Tracking. Any optional fields seen here must be created prior. For information on this, see [Utilities: Other: Action Tags: Purchase Tag](#). These custom fields, which are added to the clickstream\_ table will appear on both the Purchase Tag (as normal), but also as a value in the offline event.

## **Utilities: Other: SOAP API**

---

The SOAP API in ListManager works by fetching URLs in the ListManager web interface from within your program.

For example, if you use your web browser to go to <http://localhost/utilities/other/api/test> and click "submit" you will see the phrase "Test succeeded!".

Instead of using a web browser, you will want to use small programming scripts to fetch URLs that do actions you desire.

### **Examples in various programming languages**

Below is source code for fetching the test URL in the ListManager web interface. These examples show how easy it is to have ListManager perform an action for you.

#### *Linux Command Line*

```
curl -u admin:lyris http://localhost/utilities/other/api/test do
or
GET
http://admin:listmanager@localhost/utilities/other/api/test_do
```

#### *Microsoft ASP*

```
<% Response.Buffer = True
Dim objXMLHTTP, xml
Set xml = Server.CreateObject("Microsoft.XMLHTTP")
xml.Open "GET",
"http://admin:listmanager@localhost/utilities/other/api/test do"
,
False
xml.Send "
Response.Write xml.responseText
Set xml = Nothing %>
```

#### *PHP*

```
<?php
function urlget ($url) {
$f page = @fopen ($url, "r");
if ($f page) {
$page contents = fread ($f page, 10240);
fclose ($f page);
return ($page contents);
};
return "";
};
print
urlget ("http://admin:listmanager@localhost/utilities/other/api/t
est do");
?>
```

#### *Python*

```
import urllib
f =
urllib.urlopen("http://admin:listmanager@localhost/utilities/oth
er/api/test do")
print f.read()
```

### **How to find API functions**

In order to make it easy for you to find and understand every Programming API function in ListManager, we have organized all the functions into menus, and each function has a very simple HTML form demonstrating what kind of information the function needs, and how that function works.

### **Passing Parameters**

API functions can all be passed parameters in the URL, with the standard GET format (ie, setting=value on the URL) or alternatively, for larger amounts of data, all functions accept their parameters through the HTTP-POST standard (ie, as form POST variables).

## Return Values

Most Programming API functions return just one value. In those cases the value is returned as raw text, as the HTML results of the URL.

If an error occurs and the API function cannot work, a text message is returned in this format:

```
<ERROR>sorry, an error occurred</ERROR>
```

Some API functions need to return a list of value, such as the function for "On what lists is a given email address?". In those cases a list of items is returned in this format:

```
<ITEM>first list item</ITEM>  
<ITEM>second list item</ITEM>  
<ITEM>third list item</ITEM>
```

If an API function needs to return a key/value array, such as the function for "Get all attributes of a member", then the results are returned in this format:

```
<KEY>first key</KEY><VALUE>first value</VALUE>  
<KEY>second key</KEY><VALUE>second value</VALUE>  
<KEY>third key</KEY><VALUE>third value</VALUE>
```

## Security

The same security which the web interface enforces applies to the programming API as well. Thus, as a list administrator, you are allowed to access to all the member functions that you normally have access to in the GUI. If you try to work on a member from a list you don't have access to, an error will occur. Some API sections, such as the Server Config, SQL and List sections, require Server Administrator security rights.

All API functions are protected by an HTTP login. Whatever program you use to fetch URLs will need to pass a valid name and password when fetching the API URL (all the examples above do so). For example, in Perl this is accomplished with the command:

```
$req->authorization_basic('admin', 'lyris');
```

while in many other languages this is simply accomplished by adding username:password to the URL, like so:

```
http://username:password@hostname/utilities/other/api/test_do
```

If you are an administrator of a shared server, note that your list administrators do have access to a smaller set of the programming API, which includes most of the members API, so that they can program direct subscription management scripts.

## Performance

The speed of most API functions is fast enough for most applications.

However, if you have bulk operations you need to accomplish, such as importing a member list, you should work directly with the SQL database that ListManager is using.

# Utilities: Other: About

---

The about section tells you about the benefits of ListManager, Lyris Technologies, the people who designed and built ListManager, and support links:

## Product

Lyris ListManager is the premier email management application for business. You can use ListManager for opt-in marketing campaigns, email newsletters, and online discussion groups, among other projects.

ListManager's key benefits include:

- A powerful interface for easy management of mailings and members
- A member-friendly experience to increase list size and effectiveness
- Failsafe subscription processes to reduce list administration workload
- Speed and scalability to ensure your mail is delivered reliably

ListManager is used by thousands of businesses around the world, ranging from successful start-ups to Fortune 500 corporations. Our [customer list](#) includes many notable names, and our [press releases](#) discuss our customers' accomplishments.

The Lyris Web site includes more [product information](#) and [product reviews](#), as well as many [support resources](#) for ListManager. If you have any questions about ListManager, please [contact us](#).

## Company

Lyris Technologies develops software and services for email management, and specifically for *email messaging* and *email filtering*. We started operations in 1994, and are located in Berkeley, California.

Our goal has always been to design applications that increase the value of email. We do this by:

- Enabling permission-based ("opt-in") contact
- Facilitating the integration of email with business
- Eliminating unwanted messages ("spam")
- Reducing the time required for email administration

To learn more about Lyris, please take a look at our [company news](#) and [product directory](#). You can also [contact us](#) directly anytime.

## People

Lyris ListManager is the result of a dedicated team working together for many years, and we'd like to thank those who made a specific contribution to this version.

## Support and Documentation

We offer support for ListManager online, by email, and by telephone:

- [Search the FAQ and archives](#)
- [Submit an email support request](#)
- [Contact Lyris for direct help](#)

Our online self-help resources are available 24 hours a day, seven days a week. They include this User's Manual, Frequently Asked Questions (FAQ), and archives of publicly-available support questions. If you need help getting started or have "how to" questions, we recommend using these online resources first.

Our optional, paid support resources allow you to submit new questions by email or



telephone. You can learn more about [support contracts](#) on our Web site, or by [contacting us](#) with specific questions.

We also offer extensive documentation for programmers and server administrators: See the [Programmer's Guide](#) section of this manual or [Tclhttpd Manual \(.pdf\)](#)

# Discussion Forum Interface

## The Discussion Forum Interface for Members

---

The Discussion Forum Interface allows those who are not ListManager administrators to interact with mailing lists, or forums, through the web interface instead of by email. Server administrators are able to see all lists and read all messages in the discussion forum interface. However, to post messages to a particular list the server administrator must join the list like any other member. For more information, see [Accessing and Logging into the Discussion Forum Interface](#).

By going to

```
http://yourserver/read/
```

you may:

- Learn about forums available on the server
- Log in, and view which forums you are subscribed to
- Subscribe and unsubscribe from forums
- Read archived messages
- Search the message archives
- Hold conferences (chat sessions) with other members
- Manage your membership settings
- Find out more about a forum

In addition, list administrators may:

- Edit archived messages
- Delete archived messages

## Accessing and Logging into the Discussion Forum Interface

---

### Accessing the Main Discussion Forum Interface

You may access the discussion forum interface by going to the server's main discussion forum URL. For example:

```
http://listmanager.example.com/read/
```

Please remember to include the final slash after read. This URL will take you to the All Forums tab for the server's first site. To see forums available in other sites, access a particular forum in that site and click on All Forums.

### Accessing the Discussion Forum Interface for a Particular Forum

You may access a particular forum by specifying it at the end of the URL with `?forum=listname`. For example:

```
http://listmanager.example.com/read/?forum=listname
```

### Accessing the Discussion Forum Interface for a Different Site

Depending on the server settings in [Utilities: Administration: Server: Server Settings: Advanced: Enable Features](#), the main discussion forum interface URL either brings you to all lists for the site you are logged into, or to all lists available on the server.

### Logging Into the Discussion Forum Interface

Many forums will require that you log in in order to view messages. Others will require that you log in in order to post a message to the forum. If this is the case, you will be prompted to provide your email address and password.

Note that if you are a member of several forums on the server with different email addresses or passwords, the lists you have access to will depend on the email address/password combination you provide. If you do not have a password for some lists, but you have one for others, you will need to provide your password to access any of your lists, even those for which you do not have a password. If you try to log into a forum that you are not a member of, you will not be able to get in, and you'll be asked to log in again.

Site and server administrators have access to see and read all messages in the discussion forum interface. However, to post messages, they must first join the list as a member.

If you forget your password, and enter an incorrect password, you will be warned that an incorrect password has been entered for that email address. You can then click *email password* and you will immediately be sent an email informing you of which lists you are subscribed to, and the password for each list. You can then log in with the correct password.

### Viewing Lists by Topic

In pre-6.0 versions of ListManager, lists were organized by topics in the user interface. After the 7.0 discussion forum interface, lists are organized by site only, not by topics.

## Navigating the Discussion Forum Interface

---

The Navigation Bar is at the top of every ListManager screen. It tells you whether or not you are logged in, and which forum you're logged into (if any). The tabs are available on every screen, and help you navigate the discussion forum interface.

### Current Forum

The upper right hand corner of the screen shows you the forum you are logged into, if any.

### You Are

The upper right hand corner of the screen shows you who you are logged in as, if at all. If you would like to log in, click on Not Logged In and provide your email address and password (if you have one). Or, click on My Account or My Forums.

## Help

Clicking on the Help icon takes you to the ListManager Manual.

## Tabs

You can navigate between the major areas of the ListManager discussion forum interface by clicking on one of the Navigation bar tabs.

### Messages

Clicking on the Messages tab allows you to see an overview of the messages for the current forum. From there, you may read messages, reply to messages, or create a new message.

Depending on a forum's settings, you may need to log in before you may view its messages.

### Search

The Search tab allows you to search the message archives for the current forum.

Whether or not a forum is searchable depends on the settings for that forum.

### My Account

The My Account page allows you to change your members settings. On the **Essentials** tab, you may change your email address, name or type. On the **Advanced** tab, you may also change your password, specify whether or not you want to receive copies of your own postings, and whether or not the changes you make should take affect for all lists on the server.

If you are not logged in, clicking on **My Account** will prompt you to do so.

### My Forums

The My Forums page shows you which forums you have subscribed to. You may unsubscribe from lists on this page.

If you have not logged in, clicking on My Forums will prompt you to do so.

### All Forums

The **All Forums** page shows you all forums on the server. If there are multiple sites on a server, All Forums will only show you the lists for the sites in which you are a member. If you are not logged in, it will show you all the forums for the site you logged into, or for the default site if you did not specify a particular forum when you accessed the discussion forum interface.

# Viewing and Subscribing to Forums

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## Viewing Forums

To view all available forums for a site, click on All Forums. You will see a list of all the public forums available on the site you logged into. (For more information about logging into a site, see [Accessing and Logging into the Discussion Forum Interface](#)).

Twenty forums are displayed at one time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of forums at a time. Click **Next** to see the next twenty mailings, **Previous** to see the last twenty.

You may change the sorting order of the forums by clicking the up or down triangles next to **Name**, **Description**, and **Members Only?**. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a). Click **Next** to see the next twenty members, **Previous** to see the last twenty, or **Show more** to see up to a hundred forums.

#### **Name**

The name of the forum. Click on the forum name to read the messages for a forum. If you are already logged in, or if the list allows non-members to view messages, you will be taken to the Messages page where you can read the forum's messages. If you are not logged in, and the list allows only members to read its messages, you will be asked to log in. If you are not a member of such a list, you will need to subscribe to the forum before you will be able to access it.

#### **Description**

A description of the forum.

#### **Members Only?**

Whether or not reading the forum's messages is restricted to members, or if anyone may read them.

### **Subscribing to a Forum**

To subscribe to a forum, click "subscribe" next to the forum name. If you are logged in, you will be subscribed with your current settings. Depending on the forum's settings, you may be prompted for the following:

#### **New Subscriber Password**

The password required to join this forum. Some forums require that you specify a password in order to join. If this forum is password-protected, you must specify it here.

#### **Your Email Address**

The email address which should receive email from this forum.

#### **Your Name**

The name you'd like to be associated with your membership to this forum. This setting may be optional or required, depending on the forum. If you are already logged in, this field will be populated with the full name for the list you are currently logged into, or the name that is used most frequently for your email address on the server.

#### **Set a Password**

The password you'd like to use in order to access this forum. This setting may be optional or required, depending on the forum. If you are already logged in, this field will be populated with your password for the list you are currently logged into.

Be aware that you may not be added immediately. You may need to reply to a confirmation message in order to activate your membership. Or, your membership may be pending the approval of an administrator. Check your email for the status of your subscription.

### Unsubscribing to a Forum

To unsubscribe to a forum, click the "unsubscribe" link next to the forum name. ListManager will ask if you are sure that you would like to unsubscribe yourself (or that particular email address) from the forum. To unsubscribe from all forums, click the Unsubscribe all button. Note that if you are the list administrator for a particular list, you cannot unsubscribe from that particular list.

## Reading Messages

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### Entering a Forum

If you have already selected a forum, you may click on the Messages tab to read the messages for that forum.

There are several ways to select a forum:

1. Go to the forum directly in the URL. For example, if your server's name is `www.example.com`, and the forum you'd like to enter is `jazztalk`, the URL would be:

```
http://www.example.com/read/?forum=jazztalk
```

2. Click on the **All Forums** tab, and select the forum. You will be taken to the Messages tab.
3. Click on the **My Forums** tab, and select the forum. You will be taken to the Messages tab.

Depending on the list settings, you may need to log in before you are allowed to read the list's messages.

### The Messages Page

Twenty message threads (groups of messages and their replies) are displayed at one time. To view more, click **Show more**. Repeatedly clicking **Show more** will show greater numbers of threads at a time. Click **Next** to see the next twenty mailings, **Previous** to see the last twenty.

You may change the sorting order of the threads by clicking the up or down triangles next to Date, Subject, Replies and Author. By clicking the top triangle, the sort order will be ascending (a-z); clicking the bottom arrow makes the sort order descending (z-a).

**Date**

The date this thread started. The date displayed is from the first message sent to the thread.

**Subject**

The thread's subject. Clicking on the subject will display all the messages for a message thread.

**Replies**

The number of replies to a message. If 0, there were no replies to the message. Clicking on this number will show an overview of the messages sent to this thread. You may then click on the subject of any particular message to read it.

**Author**

The initial message's author. Click on the author's name to find out more information about the person who started this thread. You will be taken to the About this Author Page, which displays the author's name (if available), the first part of their email address (the domain is not displayed for privacy's sake), the messages posted by this member, and the date the author became a member.

From this page, you may view the messages that author has posted. That page will give you the option to view messages from all authors.

**Administrator Functions**

Administrators have additional functions when reading messages:

**Edit**

Administrators may edit a message subject, header or body.

**Delete**

Administrators can delete a message altogether. If an administrator deletes the first message in a thread, the entire thread will be deleted.

## **Sending Messages**

---

**Creating a New Message**

A new message will be a new message thread in the discussion forum interface. All replies to your message will be grouped under your initial message as a message thread.

1. Select a forum from My Forums or All forums.
2. Click on the Messages tab. Depending on the forum's settings, you may be prompted to log in.

3. Click **Create New Message**. Depending on the forum's settings, you may be prompted to log in.
4. Enter your email address (if prompted), the Subject and Message Body of the message you'd like to be sent to the forum.
5. Click **Attach File** if you'd like to send an attachment with your message. Note that you can attach any type of file, i.e. text, csv, exe, pdf, scripts, etc., but ListManager will warn you if the file is over 1 MB because many email programs do not allow attachments larger than this. Although you will be warned, the message will still be sent even if it exceeds 1 MB.
6. Click **OK** to send the message, or Cancel to abort it.

Depending on the forum's settings, your message may be sent immediately or may need to be approved. Approved messages will appear on the forum's Messages tab.

### Replying to a Message

A reply to a message will be threaded beneath the message replied to.

1. Select a message from Messages.
2. Click the **Reply** button for the message you would like to reply to. Depending on the forum's settings, you may be prompted to log in.
3. Enter your email address (if prompted), the Subject and Message Body of the message you'd like to be sent to the forum.
4. Click **Attach File** if you'd like to send an attachment with your message. Note that you can attach any type of file, i.e. text, csv, exe, pdf, scripts, etc., but ListManager will warn you if the file is over 1 MB because many email programs do not allow attachments larger than this. Although you will be warned, the message will still be sent even if it exceeds 1 MB.
5. Click **OK** to send the message, or Cancel to abort it.

Depending on the forum's settings, your message may be sent immediately or may need to be approved. Approved messages will appear on the forum's Messages tab.

## Searching for Messages

---

Some forums may allow you to search their message archives. The basic search allows you to look for particular words used in a message. The advanced search allows you to



specify the location of the words (in the message header, subject or body) or to exclude words.

## Basic Search

1. Select a forum, either in My Forums or All Forums.
2. In the left Navigation bar, click **Search**.

If the forum allows searching of its archives, you will be taken to the Search page.

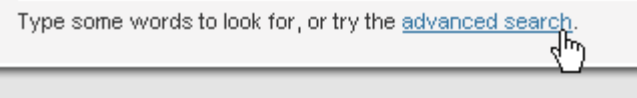
3. Enter the word(s) you'd like to search for. You may separate words with a space or comma.
4. Click the **Search** button. If your search is successful, the next page will show you the results.

## Advanced Search

1. Select a forum, either in My Forums or All Forums.
2. In the left Navigation bar, click **Search**.

If the forum allows searching of its archives, you will be taken to the Search page.

3. Click the **advanced search** command.



Type some words to look for, or try the [advanced search](#).

4. In the **Search for** box, type the word(s) you'd like to search for. You may separate words with a space or comma.
5. Under **Search for these words in**, choose an option:

**entire message:** anywhere in the message.

**body:** In the message body (below the subject line).

**header:** In the message header (includes information about the sender, the subject, etc.).

6. Select whether you want messages with **any** or **all** of the words you've selected.
7. (Optional) In the **Exclude** box, type the word(s) you'd like to exclude. Messages that contain these words will not be included in your search results.
8. Under **Exclude messages with these words in**, choose an option:

**entire message:** anywhere in the message.

**body:** In the message body (below the subject line).

**header:** In the message header (includes information about the sender, the subject, etc.).

9. Click the **Search** button. If your search is successful, the next page will show you the results.

### Advanced Search Example

Let's say you'd like to search for all messages about trains and trucks, but you'd like to exclude your own postings.

1. Select a forum, either in My Forums or All Forums.
2. In the left Navigation bar, click **Search**.
3. Click the **advanced search** command.
4. In the **Search for** box, type the words you'd like to search for:

```
trains trucks
```

5. Under **Search for these words in**, choose **entire message** for the location of the words you're searching for:
6. Select **all** to search for messages with both words (trains and trucks) in them.
7. In the **Exclude** box, type your email address.
8. Under **Exclude messages with these words in**, choose **header**. Since your email address appears in the header, your search excludes any messages sent by you.
9. Click the **Search** button. If your search is successful, the next page shows you the results.

## Editing Your Settings

---

If you are a member of a forum, you may edit your settings via email commands, or through the discussion forum interface.

1. In the left Navigation bar, click **My Account**. ListManager will prompt you to log in if you haven't already.
2. The My Account page shows your settings on two separate tabs: **Essentials** and **Advanced**. You may edit your settings here.
3. Click **Save**. This saves the changes made to your account. Click on **Cancel** to abort any changes you've made. Click on **Log Out** to log out of the discussion forum interface. You will be prompted to log in again as a different user.

### Essentials

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#### Your Email Address

The email address you've logged in with. To change it, edit it here and click **Save Changes**.

### **Your Name**

The name (if any) associated with your membership record. To change it, edit it here and click **Save Changes**.

### **Membership Type**

How you receive messages from the mailing list.

The choices are:

#### **Mail**

You receive copies of messages posted to the forum immediately.

#### **Digest**

Each night, around 12:00 am, you will receive a single email message containing all the messages contributed to the forum that day. At the top of the message will be a numbered list of the subjects in that digest, followed by the complete messages themselves. Digest recipients will not receive messages sent to segments.

#### **MIME Digest**

The same as a digest, but in MIME format so that individual message formatting is preserved. Some email clients such as Outlook will show the digest as a series of attachments. Digest recipients will not receive messages sent to segments.

#### **Index**

Each night, around 1 in the morning, you will receive a single email message containing all the subject lines of all the messages contributed to the forum that day. If any of the messages interest you, the bottom of the index gives the email command that will retrieve the bodies of the messages. Or, you can access the discussion forum interface directly.

#### **Nomail**

No email is sent to you. You are free to go the web interface whenever you want, and read the full text of the messages there. This setting is also useful for people who want the ability to contribute to a mailing list, but do not care to see the contributions to the forum.

## **Advanced**

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### **New/Verify Password**

Your password. If specified, you must use this password to log into the discussion forum interface. For your security, your password is shown as asterisks here. Depending on your settings, having a password may or may not be optional. Note that if you change your password, you will need to log into the discussion forum interface again with your new password.

To change the password, it must be entered twice to verify it has been entered correctly.

If the address has multiple accounts on the server, there will be an option to change the password for all administrators that have this email address and who used the previous password.

There will also be an option to send the specified email address a link to change the password.

### **Apply Changes**

By default, changes you make to your account apply to all of your subscriptions on the server. If you change your email address, for example, it will be changed for all forums. By selecting "No", the changes you are making will apply only to the list you are currently logged into (shown in the upper right corner of the screen). You may also have an email sent that contains a link which will allow you to change the password for all of your forums.

## **Learning More About a Forum**

---

To learn more about a list, in the left Navigation bar, click **About**. You may need to be logged in as a member to view this information. The information available here depends on what the administrator has chosen to make available.

### **Name**

The forum's name.

### **Description**

The forum's description.

### **RSS Feed**

A link to this forum's RSS feed. Those who wish to read the mail for this list via RSS can use this URL to subscribe to this list's feed in their RSS reader. See [RSS](#) for more information.

### **Forum Admins**

The names and first part of the email addresses of this forum's administrators. Only part of the email address is displayed for privacy's sake. Clicking on the email address displays more information about the admin.

### **Total Members**

The total number of normal members of this forum.

### **Total Messages**

The total number of messages sent through this forum.

**Messages Today**

The total number of messages sent today through this forum.

**Messages in 7 Days**

The total number of messages sent through this forum in the past 7 days.

**Messages in 30 Days**

The total number of messages sent through this forum in the past 30 days.

**Date Created**

The date this forum was created.

**Allows Visitors**

Whether or not only members can view information about this list and read messages, or only members can.

## RSS

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Messages saved in ListManager's archives may be syndicated using RSS (Really Simple Syndication or Rich Site Summary) . RSS allows people with an RSS aggregator to be notified of new messages in a list's archives. They may then click on a link in the RSS feed to read the message.

The URL for ListManager's RSS feeds is available in the Discussion Forum Interface, on the About tab. To receive the RSS feed, users go to the RSS URL, and then "subscribe" it with their RSS aggregating software (this "subscribe" function is not the same as "subscribing" to a list in ListManager).

The URL to the RSS feed will generally be formatted as follows:

`http://example.com/read/rss?forum=forumname&rev=0.92`

ListManager uses RSS version 0.92. RSS aggregators using version 0.92 or later will be able to read ListManager's RSS feed.

If your list requires users must log in to access the list, the RSS feed URL will include a token to permit access, and the messages users view will be personalized.

**RSS Access**

ListManager's RSS function supports authentication and authorization. The same settings controlling access to the Discussion Forum Interface controls RSS access.

RSS will only be available if your list is set to keep [archives](#). Without archives, no messages will be displayed.

If the list [allows visitors](#), then non-members will be able to subscribe to the list's RSS feed without actually subscribing to the list. If not, members will need to login in order to proceed to the About tab and get the RSS URL. The login information will then be included in the RSS URL on the About tab, and will be formatted to include your email address and password (encrypted).

Only those IP addresses granted access to the Discussion Forum Interface in [Utilities: Administration: Server: Server Settings: Security: Web: TCP/IP for Discussion Forum Interface](#) will have access to the list via RSS.

ListManager will return messages from the past 14 days, up to one hundred messages.

### **RSS Reading**

The appearance and threading of ListManager's RSS feed largely depends on the RSS aggregator used. ListManager's RSS feed is designed to show the subject line and a portion of the message in the RSS aggregator, and to thread based on the subject. The RSS messages contain a link that takes the reader to the appropriate message in ListManager's Discussion Forum Interface.

## **Newsgroups (NNTP)**

---

Messages saved in ListManager's archives may be accessed using NNTP (Network News Transfer Protocol) . Newsgroups allows people to use an NNTP reader (such as that provided with Outlook) to read messages in a list's archives without going to the ListManager web interface.

The hostname to access ListManager via NNTP is the same as for your ListManager server. For example, if the URL to ListManager is <http://lists.example.com>, enter [lists.example.com](http://lists.example.com) where the newsreader asks for the news (NNTP) server.

NNTP is a feature of ListManager Pro or Enterprise, and is unavailable for standard ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Pro or Enterprise.

### **NNTP Access**

ListManager's NNTP function supports authentication and authorization. The same settings controlling access to the Discussion Forum Interface controls NNTP access.

NNTP will only be available if your list is set to keep [archives](#). Without archives, no messages will be displayed.

If the list [allows visitors](#), non-members will be able to access the list via NNTP without actually subscribing to the list. If not, members will need provide the correct email address and password in their newsgroup client.

Only those IP addresses granted access to the Discussion Forum Interface in [Utilities: Administration: Server: Server Settings: Security: Web: TCP/IP for Discussion Forum Interface](#) will have access to the list via NNTP. In addition, NNTP must be enabled in [Utilities: Administration: Server: Server Settings: Advanced: Enable Newsgroups](#).

If your list requires users must log in to access the list, the messages users view will be personalized if there are mail merge tags in the messages.

## Administrator Discussion Forum Functions

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Administrators may use the discussion forum interface as members do, but they have additional capabilities when reading messages.

### **Edit**

Administrators may edit a message subject, header or body.

### **Delete**

Administrators can delete a message altogether. If an administrator deletes the first message in a thread, the entire thread will be deleted.

Note that you must be logged in as an administrator to be able to edit or delete messages. To administer the list or to approve messages, you must log into the [administrator's web interface](#).

## Discussion Forum Interface FAQ

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### **Why can't I enter a forum?**

Some forums allow members only to read archived messages. You will need to [subscribe](#) or [log in](#) before you can access these forums.

### **Why can't I join a forum?**

You may need to confirm your membership before you can join it. Check your email to see the status of your membership.

Depending on its settings, a forum may be closed, or require the administrator's permission before you may join. You may go to the [About tab](#) and click on the administrator's email address if you have any questions about the forum.

### **Why can't I send a message?**

Most forums require that you be a member before you may post a message. Be sure that you are a member, and that you have [logged in](#).

The forum may also require that an administrator approve your message before it is sent to the list. In these cases, it may take some time before the administrator reads and approves your message.

### **Why can't I read or search for messages in a forum?**

Some forums only allow members to read messages. If you aren't a member, [subscribe](#) to the forum to read messages. If you are already a member, you may need to [log in](#) to read messages.

Not all forums keep message archives, or keep archives for a limited period of time. Other forums may keep archives, but may not make them searchable. You may go to the [About tab](#) and click on the administrator's email address if you have any questions about the forum.

### **Why don't I see all forums on the server? I know there are others!**

Some administrators may choose to hide their forums, so they are not visible when you click [All Forums](#). You may still go to these forums directly, but you cannot browse for them.

Forums are also grouped into different sites. If you are logged into one site, you may not see forums for another site. You need to [log into a forum](#) for that site to see that group of forums.

### **Why can't I log in?**

Make sure that you are adding the final slash to the URL if you are getting an authentication window.

If you are a member of several forums on the server with different email addresses or passwords, the lists you have access to will depend on the email address/password combination you provide when you try to log in. If you do not have a password for some lists, but you have one for others, you will need to provide your password to access any of your lists, even those for which you do not have a password.

If you are not a member of any list, you should click on [All Forums](#) in order to subscribe.

Server and site administrators must be members of a list in order to log in.

### **Why do I keep getting asked to log in?**

If you do not log in successfully, the interface assumes that you made a mistake when trying to log in and asks you to log in again. Click on the Messages or All Forums tabs if you'd like to stop trying to log in.

### **What do I do if I forget my password?**

If you forget your password, and enter an incorrect password, you will be warned that an incorrect password has been entered for that email address. You can then click *email password* and you will immediately be sent an email informing you of which lists you are subscribed to, and the password for each list. You can then log in with the correct password.

### **Why am I asked if I want to accept a cookie?**



Cookies allow ListManager to keep track of your log in information as you move through your forums. They also allow you to share URLs with others so they can go directly to a posting, for example.

Your browser must accept cookies in order to log in and use the discussion forum interface. Either manually accept the cookies ListManager is giving to you, or change your web browser's settings to allow cookies.

# ListManager Administration

## Configuring ListManager from the Command Prompt

### Database Operations

---

ListManager has a number of command line options for database actions. To use them, open a command prompt, and change to the directory where you have installed ListManager. Then, run

```
lm command
```

or

```
./lm command
```

if you're using Unix.

#### **dbcreatetemplates**

Creates or updates the default templates. Normally, the Setup program takes care of creating the default templates for you. The updated templates will not appear until you restart ListManager and the ListManager web server.

#### **dbbillingcreate**

Creates all the database tables used by ListManager for billing. Any existing billing tables in the database will be deleted and recreated, deleting any data in those tables.

ListManager must not be running when this command is run.

**dbcreate** Creates all database tables used by ListManager. Any existing ListManager tables in the database will be deleted and recreated.

If you specify a password on the command line, this will be used to create a default administrator account with the name "admin". If you do not specify a password the password for the admin account will be "lyris".

For example, to create the databases with an admin password of "blue", you would type:

```
lm dbcreate blue
```

Please note that this will completely erase any data you have in the ListManager tables in your database and start you anew. If you are unsure about this command, back up your database first.

ListManager must not be running when this command is run.

After running `dbcreate`, you'll need to tell ListManager what your activation code is. You can either insert it into the `lyrConfigNodeSettings` table directly, or use a command to enter this information. See [Setting Server Options](#) for more information about the `activate` and `dns` commands.

### **dbinmailcreate**

Recreate the incoming mail database table, clearing the table that already exists.

This option is useful if you want to quickly erase all email in the incoming mail database, perhaps because you sent a lot of email to ListManager that you now realize you do not want it to process.

ListManager should not be running when this command is run.

### **dboutmailcreate**

Recreate the outgoing mail database table, clearing the table that already exists.

This option is useful if you want to quickly erase all email in the outgoing mail database, perhaps because you told ListManager to send a lot of email you now realize you do not want it to send.

ListManager should not be running when this command is run.

### **dblogcreate**

Recreate the ListManager log database table, clearing out all log entries that are currently there.

This option is useful if you want to completely clear all the log entries in ListManager, in a very rapid manner. For example, if you have no need for the existing log entries, this will remove them all.

ListManager should not be running when this command is run.

### **dbupgrade**

Converts the ListManager database files to the most current format. You need to run this command when upgrading to a new version of ListManager. Normally, the Setup program takes care of running this for you. Be sure you have sufficient disk space for transaction logs before performing a `dbupgrade`. It is highly recommended that you perform a backup of your database (or a database dump for MSSQL) before upgrading your database.

ListManager must not be running when this command is run.

### **deletenode**

Deletes the specified node from the database. Syntax:

```
lm deletenode nodename
```

### **encode\_string**

Encrypts the name or password ListManager uses to connect to the database. Syntax:

```
lm encode_string password
```

The string that is returned may then be used by the [lmcfg.txt](#) parameters \$sql\_encoded\_username and \$sql\_encoded\_password to connect to the database.

### **exporttofile**

Exports the database to a flat file. This command can be used when moving to a different database when used in conjunction with the importfromfile command.

Syntax:

```
lm exporttofile filename.dat
```

ListManager must not be running when this command is run.

### **getmachinename**

Displays the default machine name for this ListManager installation.

### **importfromfile**

Imports the database from a flat file created by the exporttofile utility. This command can be used when moving to a different database when used in conjunction with the exporttofile command. If the file is being copied to another machine, be sure to transfer it in binary mode.

A database can only be imported into the same version of ListManager it was exported from. For example, you cannot import the database from a 6.0 ListManager installation into a 7.0 ListManager installation.

Syntax:

```
lm importfromfile filename.dat
```

### **noremoveduplicateoutmail**

This causes the server to not attempt to find and remove lyrActiveRecips rows that have a corresponding entry in lyrCompletedRecips. This query can be very long, even when it finds and removes nothing. It might also cause the second and subsequent nodes in a cluster to deadlock while coming up. There is a risk that some recipients might receive duplicate emails.

Syntax:

```
lm noremoveduplicateoutmail
```

**ListManager must not be running when this command is run. Note that any custom columns will not be imported.**

### **notransact**

Used with dbupgrade to stop the database from putting all the upgrade in transaction logs. This command allows the transaction logs to be manually truncated as the dbupgrade is being processed, so less disk space will be necessary. This command may be necessary if you are upgrading a very large database in MSSQL.

Syntax:

```
lm dbupgrade notransact
```

ListManager must not be running when this command is run.

#### **renamenode**

Renames the specified node in the database.

Syntax:

```
lm renamenode oldnodename newnodename
```

#### **restorerootdnsservers**

Restores any of the default DNS root servers that may be missing from the `dnsbypass_` table. If the root DNS servers have been deleted using the web interface, ListManager will not be able to function properly. To restore them, run this command at the command prompt.

Syntax:

```
lm restorerootdnsservers
```

## Setting Server Options

---

The following command line parameters let you set ListManager's configuration options. Some of these parameters can be changed from the "Server Configuration" Web Interface page. The command line versions are included for convenience (particularly when you need to change options that are critical to the ListManager web interface).

To use them, open a command prompt, and change to the directory where you have installed ListManager. Then, run

```
lm command
```

or

```
./lm command
```

if you're using Unix.

**activate** Set ListManager activation code number to that specified on the command line. Usage:

```
lm activate code
```

In the above example, you would substitute *code* with your own activation code. You should not need to use this command, as it is done automatically by ListManager during installation.

#### **clearactivation**

Clears the activation code. Usage:

```
lm clearactivation
```

If you are moving ListManager to another machine or are changing the network card, you must run `clearactivation` before activating your serial code on your new machine.

Note: if there is no serial code, ListManager will return an error. Run *lm serial* to set the serial code.

### **displaydns**

No longer implemented. In older versions, it displayed the IP addresses of the DNS servers.

### **dns**

ListManager 6.0h and higher features an integrated DNS engine, so this setting is no longer available for users of 6.0h and higher. You no longer need to set up, configure, or maintain a DNS server for ListManager to use, nor will ListManager be limited by slow DNS servers.

If you are running an earlier version of ListManager, we recommend you upgrade ListManager.

For those running 6.0g and earlier, this command allows you to set the Domain Name Server to the TCP/IP address specified on the command line. Usage:

```
lm dns ip_address [ip_address2] [...]
```

In the above example, you would substitute *ip\_address* with the IP address of your DNS server. If you want to specify multiple DNS servers, you may do so by separating them with a space.

**email** Sets the email address of the administrator of this ListManager. Usage:

```
lm email emailaddress
```

In the above example, you would substitute "emailaddress" with the email address of the person who is the primary server admin.

### **forward**

Set mail forwarding rule to "ip-address port". Usage:

```
lm forward ip_address port
```

In the above example, you would substitute *ip\_address* with the IP address of the machine you want ListManager to forward non-ListManager mail to, and you would substitute *port* with the port number on that machine that will be receiving mail.

**getactivation** Activates your ListManager serial code. Usage:

```
lm getactivation
```

If ListManager has a valid serial code that has not been activated for another server, getactivation will provide the activation code for the server. Stop and restart ListManager to have the new code take effect.

If you have changed your ListManager license, it will be updated automatically within 24 hours. However, if you'd like to unlock your new license sooner, getactivation will update your license.

If you do not have a serial code specified for your server, getactivation will return an error message. Run *lm serial* (instructions below) to set the serial code from the command prompt.

**gettcpip** Specifies the first TCP/IP address on your server. Usage:

```
lm gettcpip
```

### **helotext**

Sets the string ListManager uses in the HELO portion of the SMTP transaction. Usage:

```
lm helotext hostname
```

In the above example, you would substitute *hostname* with the text you want ListManager to use in the HELO statement. This is extremely useful if you are behind a firewall and machines on the Internet cannot resolve the hostname your machine uses.

**help** Displays the command line help. Usage:

```
lm help
```

### **lcp**

ListManager 7.5 and higher has been upgraded to use an HTTP based programming toolkit. LCP is no longer used or supported by ListManager. If you are running a version of ListManager older than 7.5, we recommend that you upgrade ListManager.

### **mailreceive**

Sets the domains/hostnames the ListManager should accept mail for. Usage:

```
lm mailreceive domain [domain_2] [...]
```

In the above example, you would substitute *domain* with the domain you want ListManager to accept mail for. This command is extremely useful when you have ListManager coexisting with another mail server on the same machine, and the ListManager will be accepting mail for well defined domains, and passing all other mail onto the other mail server.

### **moderatenotification**

Sets the type of moderated message notification for this ListManager host. Usage:

```
lm moderatenotification [old | new]
```

Use the "old" argument to receive traditional moderation notifications. Use the "new" argument to receive MIME-digest style moderation notifications.

**nntpport** Sets the TCP/IP port that ListManager accepts incoming NNTP connections on. The default is 119. Usage:

```
lm nntpport port_value
```

In the above example, you would substitute *port\_value* with the port you want ListManager to listen on for NNTP connections.

### **rebrandname**

Sets the name used when documents are sent from ListManager. By default, documents are sent from Lyris ListManager. To change this name to another, use the rebrandname option. Usage:

```
lm rebrandname your name
```

ListManager must be restarted for this change to take effect.

Changing the name requires that you have a rebrandable license. Contact your account representative at sales@lyris.com for more information about purchasing a rebrandable license.

### **rebrandemail**

Sets the email address used when documents are sent from ListManager. By default, documents are sent from lyris-admin@yourserver. Changing the email address removes the name Lyris, and replaces it with the name of your choice. Usage:

```
lm rebrandemail name
```

ListManager will provide the @ sign and the domain name, so only add what you would like to come before the @ sign.

ListManager must be restarted for this change to take effect.

Changing the email address requires that you have a rebrandable license. Contact your account representative at sales@lyris.com for more information about purchasing a rebrandable license.

### **reset\_tcpip\_server\_admin**

Resets the TCP/IP addresses allowed to access the server admin web interface. Normally, access to the web interface is limited by [Utilities: Administration: Server: Server Settings: Security: Web](#). If the server admin inadvertently locks out access to the web interface, this command can be run to allow any TCP/IP access to the server admin web interface. Usage:

```
lm reset_tcpip_server_admin
```

ListManager and the ListManager web server should be restarted after running this command.

### **retrytiming**

Allows you to set the number of retries and retry interval for this ListManager. The command takes any number of parameters, separated by commas. Usage:

```
lm retrytiming interval1 [,interval2] [,interval3] [...]
```

Each interval measures the time, in minutes, between the previous try and the next try. The smallest acceptable retry interval is five minutes and the largest acceptable retry interval is 1440 minutes (24 hours). Retry intervals which are not within the acceptable range will be ignored.

For example, if you want to establish a retry schedule of 30 minutes, two hours, eight hours, and 24 hours, you would issue the following command:

```
lm retrytiming 30,120,480,1440
```

The default retry schedule is 30 minutes, two hours, four hours, eight hours, and 16 hours.

Please note that the retry interval is measured in relation to the time of the last retry, not the time the message was originally sent.



For most lists, three to five retries is more than enough. Also, it is a good idea to schedule one retry a full 24 hours after the message originally went out, to guard against temporary network outages.

### **serial**

Sets the serial code for the server. Usage:

```
lm serial code
```

Substitute your serial code for *code* above. Once you have entered your serial code, your activation code will be updated within 24 hours. Or, you may activate it immediately by running `getactivation`.

**smtpport** Sets the TCP/IP port that ListManager accepts incoming SMTP connections on. The default is 25. Usage:

```
lm smtpport port_value
```

In the above example, you would substitute *port\_value* with the port you want ListManager to listen on for SMTP connections.

### **tclport**

Add the TCP/IP address specified on the command line to the list of allowed TCLport hosts. Usage:

```
lm tclport ip_address
```

In the above example, you would substitute *ip\_address* with the IP address of the machine that will be making TCLport connections with this ListManager host.

### **tclportbindip**

**Sets the IP address ListManager binds to for tclport, which it uses to generate the web interface. Usage:**

```
lm tclportbindip ip_address
```

### **tclportpass**

Sets the password that the TCLport uses to log into this ListManager host. Usage:

```
lm tclportpass password
```

### **tclportport**

Sets the TCP/IP port that ListManager accepts incoming TCLport connections on. The default is 2021. Usage:

```
lm tclport port
```

In the above example, you would substitute *port* with the port you want TCLport on.

### **tclporttimeout**

Configures the time, in seconds, that a TCLport will remain alive before being disconnected by ListManager. There are some situations where a TCLport connection might not be relinquished by the connecting server. The default timeout is 600 seconds, which should be sufficient for most users. The timeout can be changed with the `tclporttimeout` command-line parameter. Usage:

```
lm tclporttimeout seconds
```

where *seconds* is the time in seconds that an unused TCLport connection will stay connected. Changing this setting isn't normally required, but if you have problems with TCLport connections being used up, you can set this to a lower number, such as 600 seconds.

**tcpporttrace**

Runs ListManager, and display all tcpport (web interface) commands. Usage:

```
lm tcpporttrace
```

**version** Displays the version of ListManager that is running. Usage:

```
lm version
```

## Database Maintenance and Administration

### Database Maintenance and Administration

---

With the exception of MSDE (Windows), Lyris ListManager connects to and uses your database. Lyris Technologies does not provide technical support for installation, use or maintenance of MS SQL, or Oracle. Contact your database vendor for more information about support for these databases.

Backing up the database is the only maintenance you'll need to keep ListManager running smoothly. Backing up the database truncates the logs for MS SQL, which can fill your disk if left too long. You'll also want a backup of the database in case of a server failure. For more information about backing up your database, please consult your DBA or the appropriate documentation for your SQL database.

#### Maintaining the ListManager MSDE Database

If you are running ListManager using the included MSDE database, we strongly recommend that you [install Service Pack 3a](#) to protect your database server.

We also recommend you [perform regular backups](#) of the MSDE database.

Finally, if you have not implemented your own maintenance plan (using MS SQL client tools not included with MSDE), you should also enable the database maintenance [scheduled task](#) to perform maintenance tasks such as updating statistics and defragmenting the index.

### Connecting to Your Database with Imcfg.txt

---

The Imcfg.txt file defines the database type, name and authentication information that ListManager will use when connecting to your database. The installer will insert the values you choose as part of the installation process. To change the SQL server, database, user or password, use a plain text editor to edit the Imcfg.txt file.

Each variable is given a "\$name", followed by an equals sign (=) and the value, in quotation marks. A semicolon (;) should be at the end of each line. All lines which begin with a hash (#) are commented out, and not read when connecting to the database.

**\$node\_name**

The `$node_name` variable specifies the machine name of this ListManager instance. If you are running ListManager in a clustered configuration, each node must have a distinct node name. This name is usually the machine's hostname.

*Do not edit or change the node name!* If you do so, ListManager will create a new node in the database with no configuration information. ListManager will not function properly until the node is removed. See [Database Operations](#) for more information about the `renamenode` function.

### **\$sql\_type**

The `$sql_type` variable defines which database driver ListManager should use. Valid values for `$sql_type` are:

"MSSQL" - Native Microsoft SQL Server.

"Oracle" - Native Oracle OCI driver.

Example:

```
$sql_type="MSSQL";
```

### **\$sql\_server**

The `$sql_server` value is the host name of the machine running the your SQL server software. This value should be blank if the database is local for MSDE, or Microsoft SQL Server. Example:

```
$sql_server="mysqlserver.example.com";
```

### **\$sql\_user**

The `$sql_user` value is the login name of the user to connect to the database. This user must have full permissions to create/delete/modify values in this database. May be blank if using MSSQL and integrated security. Example:

```
$sql_user="lyris";
```

### **\$sql\_encoded\_user**

This value is the encrypted login name of the user to connect to the database. The user name may be encrypted by running `lm encode_string` from the command prompt. The encrypted string may then be used in the `lmcfg.txt` file for a more secure login to ListManager, as the SQL database user will not be passed in clear text to ListManager. The `$sql_user` value should not be used or commented out when using `$sql_encoded_username`. Example:

```
$sql_encoded_user="we418c53"
```

### **\$sql\_password**

The `$sql_password` value is the login password of the user to log in as. May be blank if using MSSQL and integrated security. Example:

```
$sql_password="lyrissqlpassword";
```

### **\$sql\_encoded\_password**

This value is the encrypted password of the user to connect to the database. The password may be encrypted by running `lm encode_string` from the command prompt. The encrypted string may then be used in the `lmcfg.txt` file for a more secure login to ListManager, as the SQL database password will not be passed in clear text to

ListManager. The `$sql_password` value should not be used or commented out when using `$sql_encoded_username`. Example:

```
$sql_encoded_password="we418c53"
```

### **`$sql_database`**

The `$sql_database` value is the name of the database ListManager should use. This value is ignored by Oracle. Example:

```
$sql_database="listmanager";
```

### **`$sql_askpassword`**

The `$sql_askpassword` option causes ListManager to ignore `$sql_password` and prompt for the SQL database password on the console. The `$sql_password` parameter is only valid when starting ListManager from the console, not when starting as a service or as a daemon. This feature enables ListManager to be run without having the SQL database password saved unencrypted in the `lmcfg.txt` file.

To enable this option, enter the variable and set to "yes". Example:

```
$sql_askpassword="yes"
```

### **`$sql_pool`**

The `$sql_pool` value is the maximum size of the connection pool that ListManager will keep. This allows ListManager to recycle connections rather than creating a new connection for every command. Example:

```
$sql_pool="25";
```

With the exception of the MSDE server which is optimized for 8 connections, a setting of 25 will give good performance for most database connections. By default, the `$sql_pool` value is set to 8 for MSDE installations and 25 for all other installations. The minimum number of database connections typically in use by ListManager is 15. Even if you set a number lower than this, ListManager will set to 15 (8 for MSDE).

### **`$log_startup_messages`**

**If set to "no", the ListManager startup messages will not be logged, either to the console or the log file. Example:**

```
$log_startup_messages="no"
```

### **`$log_directory`**

The `$log_directory` value is the directory where log files will be placed. For example, `/var/log/lm` or `C:\lm\log.` Log file names have the format `lognnnn.txt` where `nnnn` is a positive integer. If not set the log files will be placed in the same directory as the ListManager executable.

### **`$log_new_file_on_startup`**

The `$log_new_file_on_startup` value should be "yes" or "no." When set to "yes" a new log file will be created each time ListManager is run. When set to "no" ListManager will append to the latest log file. If not set ListManager will create a new log file on startup.

### **`$max_socket_connections`**

Limits the number of simultaneous socket connections that ListManager is allowed. The default setting is 3000. If you are getting warning messages during mail send that indicate ListManager is running low on file descriptors, you may need to raise this amount by several hundred or more. If you are running low on memory and experiencing stability problems, you may need to lower the amount.

For Linux users, you must open the S96lm script and raise the ulimit -n amount by 500.

## Database Timeout Values

If your database is exceptionally large, you may experience performance issues. In extreme cases, the web server can lock up waiting for a database connection due to long running database queries. To prevent this, you can specify database timeouts as options in the lmcfg.txt file. These options initialize the timeout values and the size of the reserved pool. They are recommended values; you can fine-tune as necessary.

**NOTE** You can also set these values in ListManager. The time in both places is measured in seconds.

```
$sql reserved pool = "1";  
$sql default pool timeout = "-1"; // indefinite (default).  
$sql default command timeout = "3600"; // 2 hrs.  
$sql list posting timeout = "3600"; // 2 hrs.  
$sql nightly job timeout = "3600"; // 2 hrs.  
$sql incremental update timeout = "600"; // 10 minutes  
$sql tclport pool timeout = "60"; // 1 minute  
$sql tclport command timeout = "60"; // 1 minute  
$sql master thread pool timeout = "1"; // 1 second  
$sql_master_thread_command_timeout = "1"; // 1 second
```

### Descriptions:

**\$sql\_reserved\_pool:** This is not a timeout. It is a count of the number of database connections to be used by certain processes.

**\$sql\_default\_pool\_timeout:** Pool timeouts not defined by any other timeout type.

**\$sql\_default\_command\_timeout:** Command timeouts not defined by any other timeout type.

**\$sql\_list\_posting\_timeout:** Task that handles the processing of an incoming mailing.

**\$sql\_nightly\_job\_timeout:** Used for nightly jobs.

**\$sql\_incremental\_update\_timeout:** Update summary statistics for only those mailings that have changes since the previous update.

**\$sql\_tclport\_pool\_timeout:** Timeout to get a TCL port command connection.

**\$sql\_tclport\_command\_timeout:** Timeout when TCL port command takes too long. Used for GUI (web server) transactions (HTTP GETs and REQUESTs).

**\$sql\_master\_thread\_pool\_timeout:** Timeout to get a master thread command connection.

**\$sql\_master\_thread\_command\_timeout:** Timeout when Master thread command takes too long. Used to accept incoming socket connections.

### Specifying lmcfg.txt on Startup

You can specify a different lmcfg.txt file by adding a command-line argument. This option allows programmers to have different icons on the desktop for different lmcfg.txt files.

You can use an alternate configuration file using the cfgfile command-line option. The file to load is specified after the "cfgfile" command-line argument. For example:

```
lm.exe start cfgfile mycfg.txt
```

The cfgfile arg can appear anywhere in the command line, and must be a relative path.

## MSDE Limits

---

An MSDE database is limited in total size to 2 GB. How quickly you reach 2 GB depends on the number of members you have, the frequency with which you send, how long you keep archives, incoming mail and outgoing mail, and other factors. If you are upgrading from 4.x or lower, and wish to use MSDE, you can determine how large your total database size is by adding together the size of all the files in your db directory.

ListManager will warn you via email if your database is growing too large. If you are running ListManager in the foreground and your database is too large, you'll see a message similar to this one:

```
severity: 17 - Insufficient Resources - The statement caused SQL Server to run out of resources (such as locks or disk space for the database) or to exceed some limit set by the system administrator.  
msgtext: Could not allocate space for object 'members ' in database 'ListManager' because the 'PRIMARY' filegroup is full.
```

If you find that your database is growing too large under MSDE and are unable to trim its size by managing the length of time data is kept, you should consider upgrading to a stand-alone SQL server.

## Making an MSDE Backup

---

You should make regular backups of your MSDE database in case of server failure.

### To back up MSDE

1. Shut down ListManager. If ListManager is running in a console window, *ctrl-c* will begin the shutdown process. If it is running as a service, stop the service by navigating to Start -- Settings -- Control Panel -- Administrative Tools.

2. Shut down MSDE using the SQL Server Service Manager. It can be found by clicking Start -- Programs -- MSDE -- Service Manager.
3. Using Windows Explorer (Start – Programs – Accessories – Windows Explorer), In the left Navigation bar, click the SQL Server Data Directory:

C:\Program Files\Microsoft SQL Server\MSSQL\Data>ListManager\_Data.MDF  
 C:\Program Files\Microsoft SQL Server\MSSQL\Data>ListManager\_Log.LDF

4. Copy the entire data directory to your backup location.
5. Restart MSDE using the SQL Server Service Manager.
6. Restart ListManager.

**To restore your backup**

1. Stop ListManager.
2. Copy the ListManager\_log.ldf and ListManager.mdf files from the backup location to the data directory of your MSDE installation.
3. Restart MSDE.

## **Installing Service Pack 3a for MSDE**

---

If you are using ListManager with MSDE, Lyris Technologies recommends that you install Microsoft SQL Server 2000 Service Pack 3a for MSDE so your server cannot be compromised by the Slammer Worm.

**To install Microsoft SQL Server 2000 Service Pack 3a for MSDE**

1. Shut down ListManager and MSDE.
2. Backup your database. View [backup instructions](#).
3. Download MSDE2000A.exe from <http://www.microsoft.com/downloads>.
4. You will be prompted to create a SQL2KSP3a folder on your c: drive.
5. After the files are extracted in the SQL2KSP3a directory, use the command line to change to the SQL2KSP3a/MSDE directory.
6. From the command prompt, run the following command:

```
setup /upgradesp sqlrun SECURITYMODE=SQL UPGRADEUSER=sa
UPGRADEPWD=yourpasswd
```

\* Keep in mind this might take several minutes to update.

7. Restart MSDE and ListManager.
8. If ListManager has problems connecting to MSDE, run the SQL Server Network Utility to enable TCP/IP and Named Pipes for the enabled protocols. To do so:
  - Click Start
  - Click Run
  - Enter SVRNETCN.EXE, and click ok.
  - Add TCP/IP and Named Pipes for the Enabled Protocols.

If you are running a version of MSDE other than the version bundled with ListManager, you should contact the vendor who distributed your version of MSDE for upgrade and patching instructions.

## Improving Performance for an Oracle Database

---

Oracle10g introduces the ability to reclaim space from a segment by shrinking of the segment. Shrinking a segment makes unused space available to other segments in the tablespace, does not affect your ability to access data, and may improve the performance of queries and DML operations. To use this feature, you must have the Automatic Segment Space Management (ASSM) and row movement features enabled.

## Date Problem on Oracle Cluster

---

**Problem:** When an Oracle node ListManager is talking to fails and ListManager transparently connects to another Oracle node, the NLS\_DATE\_FORMAT value for the session doesn't persist.

**Solution:**

```
create or replace trigger data_logon_trigger
after logon
ON DATABASE
begin
    execute immediate
        'alter session set nls_date_format = "YYYY-MM-DD
        HH24:MI:SS" ';
end;
/
```

## Limiting the Number of Simultaneous Sockets

---

If you are getting warning messages during mail send that indicate ListManager is running low on file descriptors, you may need to limit the number of simultaneous sockets.

**Windows**

1. Open your lmcfg.txt file.
2. The default setting for the **\$max\_socket\_connections** variable is 3000. Raise it to 3500. If this does not help, try raising it again until mail send improves.

**Linux**



1. Open the S96lm script.
  2. Raise the ulimit -n amount by 500. If this does not help, try raising it again until mail send improves.
- NOTE** If you are running low on memory and experiencing stability problems, you may need to lower the above amounts.

## The ListManager Web Server

### The ListManager Web Server

---

Part of your ListManager installation is the ListManager Web Server. If you are upgrading from an earlier version of ListManager and were using the Apache web server included with ListManager, it will be uninstalled, and the ListManager Web Server will be installed. The ListManager web interface will then be available by going to the ListManager machine's host name:

`http://yourhostname.example.com`

If you already have a web server running on the machine which you are installing ListManager on, ListManager will install the web interface on a higher port. For Windows, the next port available above 80 will be selected; for Unix, you will be able to select the port. The ListManager URL in those circumstances would be:

`http://yourhostname.example.com:81`

Note that multiple web servers can serve multiple ListManagers. A single pool of web servers can run for multiple ListManagers. This is helpful for service provider/hosting applications. It is not necessary to run the same version of ListManager, so they can be upgraded one at a time without complication. To do this, all Tcl web server IP's must be set up in [Utilities: Administration: Server: Server Settings: Security: GUI Hosts](#). Then the ListManager site(s) must be set up, in [Utilities: Administration: Sites: New Site: Essentials](#). Then the `tclweb/bin/tclhttpd.rc` file must be modified.

#### The Web Server and Tracking

If the ListManager Web Server is unavailable, ListManager will not be able to register any tracking events, or serve the invisible gifs used for opens and HTML detection. To track clickthroughs, clickstreams, Interest and Purchase Tracking, your ListManager Web Server **MUST** be running and available through your firewall (if applicable).

If you are using ListManager's tracking features, you may want to install the ListManager Web Server on another machine, or possibly on multiple machines if you are sending to large lists.

The number of web servers you need to set up will depend on how extensively you use the tracking features. If you use multiple servers, they should all have the same hostname for their A record, so that the load is balanced between them.

Your license limits how many ListManager web servers you may have. Contact your Lyris sales representative or email [sales@lyris.com](mailto:sales@lyris.com) for more information.

#### Web Logs

ListManager creates and maintains a web log for ListManager 7.5 or later. The web server creates a log file, which by default can be found in:

```
~\tclweb\htdocs\utilities\debug\logs
```

An example of the full path for this would be:

```
C:\Program Files\ListManager\tclweb\htdocs\utilities\debug\logs
```

The log files are .txt files, and are kept indefinitely once they are created. They display information such as the IP address that connected, and the type of operating system.

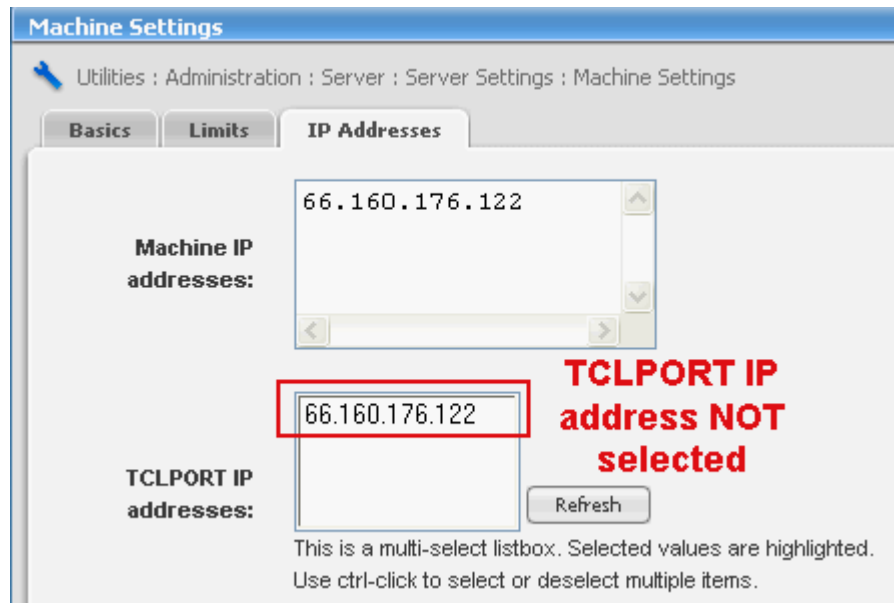
### Firewall Considerations

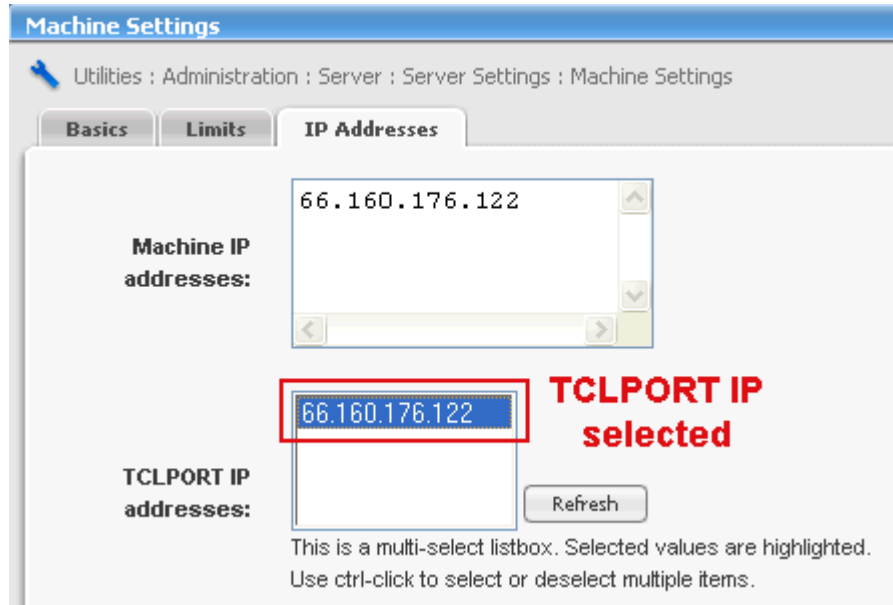
To use ListManager's tracking features, your ListManager web interface(s) must be available outside your firewall. See [Your Firewall and ListManager](#).

### TCLPORT IP addresses

By default, ListManager will only listen to the loopback address (127.0.0.1). You may specify that ListManager accept connections on other IP addresses. If you need to have other servers be able to connect to ListManager for scripting, you will need to specify the machine's IP address here.

You can select one or more IP addresses to connect to ListManager via TCLPORT from a remote server.





#### To select a TCLPORT IP address

1. In the left Navigation bar, click **Utilities**, point to **Administration**, then point to **Server**, then point to **Server Settings**, and then click **Machine Settings**.
2. Click the **IP Addresses** tab.
3. Highlight the address in the **TCLPORT IP addresses:** window.
4. Click **Save**.
5. ListManager must be stopped and restarted to activate this change.

## Web Server Availability

---

You can start, run and upgrade the ListManager program independently of the ListManager Web Server. While the ListManager program is not running, recipients will still be able to click on most links and see the pages associated with those links. Also, the Web Server will continue to capture data from the following recipient actions:

- clickthroughs
- clickstreams
- purchase tracking
- member updates
- unsubscribes
- detect\_open / detect\_html / detect\_both

The data is saved to disk and is processed the next time the ListManager program runs. Attempts at operations not listed above result in an error screen.

Every time the web server sends a command to the ListManager program, it checks the versions of each. If they are not the same, the web server views the program as being "not available" and saves data to disk as described above. After the program is upgraded and the versions do match, the data is processed.

## NOTES

- Unsubscribes are not processed immediately. A message is transmitted stating the unsubscribe will be processed shortly; if email notification is requested, an email is sent if the unsubscribe fails or if it succeeds.
- When upgrading ListManager, upgrade the web server first. This ensures that you will continue to capture data while the ListManager program is being upgraded.

## Starting and Stopping the ListManager Web Server

---

The web interface is the main way you, the administrator, work with ListManager. You will use the web interface to create sites, topics, mailings lists and access all of the functionality in ListManager.

### Starting and Stopping the Web Server in Windows:

To start the ListManager Web Server manually, open a command prompt and change to the C:\Program Files\ListManager\tclweb\bin directory. To start the Web Server, run `httpd-lm.exe`

To stop the Web Server, hit ctrl-c.

The ListManager web server may be run as a Windows service; see [Windows Services](#) for more information.

### Starting the Web Server in Linux:

To start the ListManager Web Server manually, change to the ~ListManager/tclweb/bin directory, and run `./httpd-lm`

To stop the Web Server, hit ctrl-c.

The ListManager Web Server may also be run from the ~ListManager/bin directory using the start script:

```
./S96httpd-lm start
./S96httpd-lm stop
```

## Installing the Web Interface on a Separate Machine

---

1. Run the ListManager installer on the machine you'd like to run the web interface on.

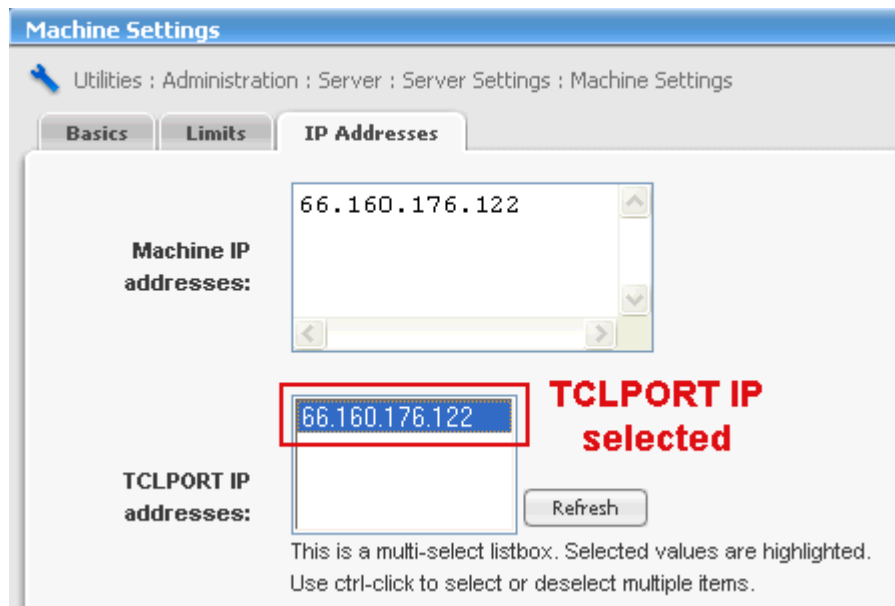
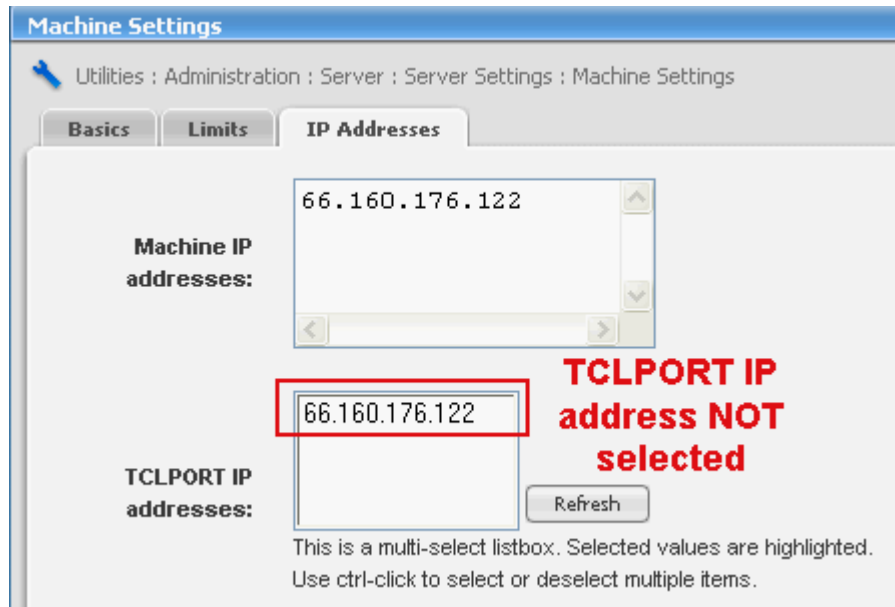
2. Install ListManager. The installer will request database connectivity information, but you need not provide it. Once ListManager is installed, do not run lm.exe. You will only be running httpd-lm.exe on this machine.
3. Find the file `~tclweb/bin/tclhttpd.rc`, and open it with a plain text editor.
4. Edit the Config `tclport_ip` to be the TCP/IP address of your original ListManager server. Also edit the Config `tclport_port` if you have changed it in [Utilities: Administration: Server: Server Settings: Network Settings: Ports](#) and Config `tclport_password` if you have changed it in [Utilities: Administration: Server: Server Settings: Advanced: For Programmers](#).
5. Go to your original ListManager installation, and edit [Utilities: Administration: Server: Server Settings: Security: GUI Hosts](#). Add the IP address of the remote web server to the IP addresses currently there.
6. Start the ListManager Web Server on the remote machine. You should now be able to access the ListManager web interface.
7. To make clickthroughs use the hostname you've configured for your remote server, configure it in URL to Web Interface in [Utilities: Administration: Sites: Edit Site: Essentials](#).

Note that you must have port 2021 open between your original ListManager installation and your ListManager web server.

### **TCLPORT IP addresses**

By default, ListManager will only listen to the loopback address (127.0.0.1). You may specify that ListManager accept connections on other IP addresses. If you need to have other servers be able to connect to ListManager for scripting, you will need to specify the machine's IP address here.

You can select one or more IP addresses to connect to ListManager via TCLPORT from a remote server.



#### To select a TCLPORT IP address

1. In the left Navigation bar, click **Utilities**, point to **Administration**, then point to **Server**, then point to **Server Settings**, and then click **Machine Settings**.
2. Click the **IP Addresses** tab.
3. Highlight the address in the **TCLPORT IP addresses:** window.
4. Click **Save**.
5. ListManager must be stopped and restarted to activate this change.

# How to Install the Web Interface by Hand

---

The ListManager Web Server does not need to be installed on the same machine as ListManager; it can be on a different machine. The easiest way to install the ListManager Web Server on another machine is to run the installer on that machine and select the appropriate option to install just the web server.

However, if you wish to install the ListManager Web Server by hand on a different machine, follow these steps

1. Uncompress the ListManager archive to the directory from which you will run the ListManager Web Server. Note: We use the name `~lm` to refer to this directory.
2. Rename the file `~lm/tclweb/bin/tclhttpd_template.rc` to `tclhttpd.rc`. Edit it, replacing `'$HOSTNAME'` with the name of the machine; `'$PORT'` with the port you want the web server to listen to (e.g., 80); and `'$EMAILADDR'` with the email address of the administrator.

3. Run the command:

```
~lm/tclweb/bin/httpd-lm
```

To run the ListManager Web Server in the foreground, or run the command:

```
~lm/tclweb/bin/httpd-lm 1>/tmp/httpd-lm-stdout.txt 2>/tmp/httpd-lm-stderr.txt &
```

To run the ListManager Web Server in the background.

4. Start ListManager:

```
~lm/bin/lm start
```

Now, try to display the web interface by pointing a web browser at the URL `http://your.web.server/`. The web interface should appear in your browser. If it does not, look at the ListManager console. If it says, "unauthorized connection attempt from ZZZZ", then repeat step #7 for that TCP/IP address and try again.

## Configuring the ListManager Web Server - tclhttpd.rc

---

The file `~listmanager/tclweb/bin/tclhttpd.rc` contains the configuration information for the ListManager Web Server. The ListManager web server will be configured for you automatically during installation. If for some reason you need to change the configuration (for example, if you'd like to move the web interface to another port), edit `~ListManager/tclweb/bin/tclhttpd.rc` with a plain-text editor.

The file contains notes about each setting and how to configure them. These settings are those that may need to be changed if you change the name of your server, the port it should listen to, or the TCP/IP address it uses.

### Config host

The fully-qualified host name of this server.

**Config port**

The port the web server uses for HTTP requests. The default is 80. If you have another web server running on the same machine as ListManager, the installer will have moved the port (e.g., 81). If you change the port of the web server, be sure to change the URL to Web Interface in [Utilities: Administration: Sites: Edit Site: Essentials](#).

**Config ipaddr**

The TCP/IP address used by the web server. By default, this is set to your host name. To force it to use only one IP address (for instance, if you are behind a firewall), enter that IP address here. If you change the port of the web server, be sure to change the URL to Web Interface in [Utilities: Administration: Sites: Edit Site: Essentials](#).

**Config USE\_TLS1**

Enables SSL support for the ListManager Web Server. See [Adding SSL to the ListManager Web Server](#) for more information about SSL support. Note that "0" disables the SSL support, and "1" enables it.

**iocp\_overlapped\_accept\_count**

Sets how "bullet-proof" the web server's listening socket is from heavy loads and SYN flood attacks. This limit should be raised if connecting clients complain about CONREFUSED or TIMEOUT errors, or the server log files list many "peer disconnect" errors in a row.

In severe lab testing, the developer discovered that a setting of 700 appears to completely bullet-proof, but that setting does reserve about 337K of the special 'non paged' memory pool. The 'non paged pool' is a global resource and is limited to about 1/4 of the physical memory of the machine for all processes combined. Each count is equivalent to about 500 bytes of reserve.

**Tclport Connection Information**

The following settings are used by the webservice to talk to ListManager. Changes to these settings may disable your web interface unless the same changes are made to the ListManager lyrConfigNodeSettings table.

**Config tclport\_ip**

The TCP/IP address of your ListManager server. If the web interface is running on the same machine as ListManager, then this setting should be the TCP/IP address of your machine or 127.0.0.1.

However, there is no requirement that the web interface be on the same computer as the ListManager. If this is the case, then this parameter should point to the TCP/IP address of the ListManager you want to display.

By default, this setting should be "127.0.0.1", meaning that that the ListManager is on the same machine as this web interface. See [Installing the Web Server on a Separate Machine](#) for more information about having the web server on a separate machine.

**Config tclport\_port**

The port number that should be used by the ListManager Web Server to talk to ListManager. This value is 2021 by default. If this value is changed, it must also be changed in ListManager by running

lm tclport *number*



See [Setting Server Options](#) for more information.

### **Config tclport\_password**

The login password used by the ListManager Web Server when connecting to ListManager. This value is TCLPORTPasswd by default. This password must be the same as the value in the ListManager lyrConfigClusterSettings table in order for the web interface to function. This is a security precaution so that unauthorized users cannot access the ListManager Web Server. If this value is changed, it must also be changed in ListManager by running

```
Im tclportpass password
```

See [Setting Server Options](#) for more information.

### **Config disable\_api**

The ListManager SOAP-based API is enabled by default. To disable it, set this parameter to 1.

### **Config ASP Settings**

#### **To disable the ASP option**

Config ASP 0

#### **To enable the ASP option**

Config ASP 1

The following items are removed from the interface when the ASP option is enabled:

Content: Insert URL: Referral

Utilities: List Settings: New Subscriber Policy: Confirm Subscribes

Utilities: List Settings: Automatic Maintenance: Error Mail: Hold Users

Utilities: List Settings: Automatic Maintenance: Error Mail: Bounce Limit

Utilities: List Settings: For Programmers : Extensions

Utilities: List Settings: For Programmers : Email Scripting (except Initialization Script)

Utilities: List Settings: Site map changed to reflect missing settings

### **Setting Up Multiple Web Servers to Serve Multiple ListManagers**

Multiple web servers can serve multiple ListManagers. A single pool of web servers can run for multiple ListManagers. This is helpful for service provider/hosting applications. It is not necessary to run the same version of ListManager, so they can be upgraded one at a time without complication. To do this, all Tcl web server IP's must be set up in [Utilities: Administration: Server: Server Settings: Security: GUI Hosts](#). Then the ListManager site(s) must be set up, in [Utilities: Administration: Sites: New Site: Essentials](#). Then the tclweb/bin/tclhttpd.rc file must be modified to include the following lines:

```
#####  
# MJP - new multi-listmanager configuration:  
#  
# tclport_multihosts - if this exists and is set to 1, then the multiple listmanager hosts  
# logic  
# is turned on, and the following Config values will be checked and acted upon:
```

```

#
# tclport_use_DNS - if this exists and is set to 1, DNS will be used to locate the correct
# listmanager host specified by each incoming request. This of course requires a local
# subnet
# behind a loadbalancer, so the DNS in this private environment specifies the
# listmanager host
# and not the tcl web server.
#
# tclport_DNS_IP1
# tclport_DNS_IP2 - these are the IPs of the DNS servers to use if tclport_use_DNS ==
# 1. You can add
# more DNS servers (tclport_DNS_IP3, tclport_DNS_IP4, etc.) as long as the numbers
# are consecutive.
#
# tclport_hosts - if not using DNS, this gives a list of hostname-hostip pairs to map any
# request that comes in to the correct listmanager back-end machine. This is necessary
# if
# you are not using a private subnet behind a loadbalancer.
#

Config tclport_multihosts 1
Config tclport_use_DNS 1
Config tclport_DNS_IP1 xxx.xxx.x.xxx
#Config tclport_DNS_IP2 xxx.xx.xx.x

#Config tclport_hosts {{joe.example.com} {xxx.xx.xx.xx} \
# {joe} {xxx.xx.xx.xxx} \
# }

```

## Parameters for URLID to URL Caching

### **Config urlcache\_directory [file join [Config home] ../urlcache]**

Where to store the disk-cached files.

### **Config urlcache\_monitor\_interval 300**

How often to check to see if new tracking URLs have been created (to pre-cache them)  
. The setting is in seconds, so 300 (seconds) = five minutes.

### **Config urlcache\_precache\_max\_fetch 500**

This is the maximum number of items the pre-cacher will fetch. This occurs after server startup, so it does not affect initialization time. All newly created URLs are fetched again every five minutes up to the amount set for this parameter. The default setting of 500 should suffice for most situations while still being fast enough to prevent any noticeable load on the server.

### **Config urlcache\_max\_items 10000**

How many items to store in memory. 10,000 items should take about 2.5 MB of memory; 1,000 should take 250 KB of memory. The higher the setting, the better the performance, to a point; we recommend a minimum of 1000 (one thousand) and a maximum of 10000 (ten thousand). A setting higher than 10000 will not result in increased performance.

**NOTE** The default settings should work fine for most situations.

---

[\\_Ref1332963060](#) [\\_Ref-1092303787](#)

## Adding SSL to the ListManager Web Server

SSL (Secure Sockets Layer) is a protocol that allows you to manage security of your web server. ListManager supports SSL 3 and TSL 1.

In order to use SSL with the Lyris ListManager Webserver, it is necessary to generate a private key file and go through the process of acquiring a certificate file, as well as enabling SSL in the tclhttpd.rc file. The example we provide here for generating the SSL files use OpenSSL (<http://www.openssl.org>), but a similar process can be done with tools from RSA (<http://www.rsa.com>). You will need to have OpenSSL installed and have an openssl (or openssl.exe) binary to follow this example.

We include (in the 'tclweb/bin/certs/' directory) the openssl program so that you do not need to obtain it yourself. However, if you prefer, openssl can also be compiled from source, downloaded as an RPM (for Linux), or obtained from Cygwin (<http://www.cygwin.com>).

SSL is a feature of ListManager Pro and Enterprise, and is unavailable for standard ListManager. Contact your account representative at [sales@lyris.com](mailto:sales@lyris.com) if you'd like to upgrade to ListManager Pro or Enterprise.

Please note: These examples are for illustrative purposes only. If you need extra assistance please contact [sales@lyris.com](mailto:sales@lyris.com) to learn about our professional services.

### **SSL Installation Information:**

- [Adding SSL for Windows](#)
- [Adding SSL for Linux](#)
- [Installing an Intermediate Root Certificate](#)

### **Adding SSL for Windows**

1. Open a command prompt, and then change the directory to **...tclweb/bin/certs/**.

2. Generate a CSR file (Certificate Request) and the private key file

**NOTE** This should all be on the same line:

```
openssl req -new -nodes -keyout skey2.pem -out public2.csr -  
config openssl.conf
```

You will be prompted for a passphrase, and various data about your organization. If you wish, you can edit the openssl.cnf file to provide default information for your organization, so you don't have to type it each time you create a certificate. Verisign (<http://www.verisign.com>) has some example input for creating the certificate request.

3. You will have generated two files: your public key for requesting a certificate (public.csr), and a private key (skey.pem). These files should be protected from the outside world.

4. Submit the CSR file you created to a Certifying Authority (CA) such as Verisign. The certificate request should look something like

```
-----BEGIN CERTIFICATE REQUEST-----  
JLKJSDKLSJDLKJLKjdfakslfjaldkfafLSKJDSL234324/a/adsfasaadadfasda  
More letters and numbers....  
-----END CERTIFICATE REQUEST-----
```

To test SSL, you can request a temporary (15 day) license from Verisign by looking for the free SSL Trial ID offer. In order to use this test license, you will also have to install a Client Certificate ("Test CA Root") into the client browser you are planning to use.

5. Fill out the technical contact information and submit. You will receive your certificate via email.

6. Install the certificate in the ListManager web server. The file you receive back from Verisign (or you favorite certificate authority) should be copied into a file called server.pem.

7. Copy the server.pem and skey.pem (from step 1 above) to the ListManager tclweb\bin\certs directory.

8. Turn on the SSL option for the ListManager webserver. Open tclweb\bin\tclhttpd.rc in the ListManager directory with a plain text editor (such as Notepad or Wordpad) and edit the following line to be as follows:

```
Config USE_TLS1 1  
Config USE_SSL2 1  
Config USE_SSL3 1
```

By default this option is off (0).

9. Add a list of SSL ciphers to support, if necessary, to the Config SSL\_CIPHERS setting.

```
Config SSL_CIPHERS { }
```

**NOTE** OpenSSL provides the SSL support for TclHttpd. The TclHttpd setting "Config SSL\_CIPHERS { }" takes a string of the same form expected by OpenSSL's "ciphers" command:

**openssl ciphers [-v] [-V] [-ssl2] [-ssl3] [-tls1] [cipherlist]**

Note that multiple ciphers are listed with ":" (colon) between each cipher name:

```
Config SSL_CIPHERS {ALL:eNULL}  
Config SSL_CIPHERS {3DES:+RSA}
```

You can learn more about OpenSSL and ciphers [here](#).

10. Restart the webserver. You should see output like this (if started from the command line).

```
ListManager Web Interface: now running on port 80  
secure httpd started on SSL port 443
```

## Adding SSL for Linux

1. Generate a CSR file (Certificate Request) and the private key file:

```
openssl req -new -nodes -keyout skey.pem -out public.csr -config
openssl.conf
```

You will be prompted for a passphrase, and various data about your organization. If you wish, you can edit the openssl.cnf file to provide default information for your organization, so you don't have to type it each time you create a certificate. Verisign (<http://www.verisign.com>) has some example input for creating the certificate request.

2. You will have generated two files: your public key for requesting a certificate (public.csr), and a private key (skey.pem). These files should be protected from the outside world. To set the file permissions appropriately, run:

```
chmod 600 skey.pem
```

3. Submit the CSR file you created to a Certifying Authority (CA) such as Verisign. The certificate request should look something like

```
-----BEGIN CERTIFICATE REQUEST-----
JLKJSDKLSJDLKJLKjdfakslfjaldkfafLSKJDSL234324/a/adfsaadaadfasda
More letters and numbers....
-----END CERTIFICATE REQUEST-----
```

To test SSL, you can request a temporary (15 day) license from Verisign by looking for the free SSL Trial ID offer. In order to use this test license, you will also have to install a Client Certificate ("Test CA Root") into the client browser you are planning to use.

4. Fill out the technical contact information and submit. You will receive your certificate via email.

5. Install the certificate in the ListManager web server. The file you receive back from Verisign (or you favorite certificate authority) should be copied into a file called server.pem.

6. Copy the server.pem and skey.pem (from step 1 above) to the ListManager tclweb/bin/certs directory.

7. Turn on the SSL option for the ListManager webserver. Open tclweb/bin/tclhttpd.rc in the ListManager directory with a plain text editor (such as emacs or vim) and edit the following line to be as follows:

```
Config USE_TLS1 1
Config USE_SSL2 1
Config USE_SSL3 1
```

By default this option is off (0).

8. Restart the webserver. You should see output like this (if started from the command line).

```
ListManager Web Interface: now running on port 80
secure httpd started on SSL port 443
```

## Installing an Intermediate Root Certificate

When using an intermediate root certificate, you may get an error indicating that the certificate is not yet valid, or has expired, when it clearly is in the correct date range. Here is how you solve that problem with Verisign:

1. Cd to tclweb/bin (underneath the directory where you installed ListManager)
2. Make a backup copy of the file tclhttpd.rc.
3. Open tclhttpd.rc with a plain text editor.
4. Replace

```
Config SSL_CAFILE "
```

with

```
Config SSL_CAFILE [file join [Config SSL_CADIR] intermediate.crt]
```

5. Save tclhttpd.rc.

In the "certs" directory (underneath "bin"), create a file "intermediate.crt" and add this to it (including the CERTIFICATE headers)

(obtained from <https://www.verisign.com/support/site/caReplacement.html> ):

-----BEGIN CERTIFICATE-----

```
MIIDgzCCAuygAwIBAgIQJUuKhThCzONY+MXdriJupDANBgkqhkiG9w0BAQUFADBf
MQswCQYDVQQGEwJVUzEXMBUGA1UEChMOVmVyaVNpZ24sIEluYy4xNzA1BgNV
BAsT
LkNsYXNzIDMgUHVibGljIFByaW1hcnkgQ2VydGImaWNhdGlviBBdXRob3JpdHkw
HhcNOTcwNDE3MDAwMDAwWhcNMTEExMDI0MjM1OTU5WjCBujEfmB0GA1UEChM
WVmVy
aVNpZ24gVHJ1c3QgTmV0d29yazEXMBUGA1UECXMOMVmVyaVNpZ24sIEluYy4xMzA
x
BgNVBAsTKlZlcmITaWduIEludGVybmF0aW9uYWwgU2VydMvYlENBIC0gQ2xhc3Mg
MzFJMEcGA1UECxAzZ3LnZlcmIzaWduLmNvbS9DUFMgSW5jb3JwLmJ5IFJlZi4g
TEIBQkIMSVRZIEExURC4oYyk5NyBWZlJpU2lnbjCBnzANBgkqhkiG9w0BAQEFAAOB
jQAwGykCgYEA2IKA6NYZAn0fhRg5JaJIK+G/1AXTvOY2O6rwTGxbtueqPHNFVbLx
veqXQu2aNAoV1Klc9UAI3dkHwTKydWzEyruj/IYncUOqY/UwPpMo5frxCTvzt01O
OfdcSVq4wR3Tsr+cDCVQsv+K1GLWjw6+SJPKLICp1OcTzTnqwSye28CAwEAAaOB
4zCB4DAPBgNVHRMECDAGAQH/AgEAMEQGA1UdIAQ9MDswOQYLYIZIAyB4RQE
HAQEw
KjAoBggrBgEFBQcCARYcaHR0cHM6Ly93d3cudmVyaXNpZ24uY29tL0NQZuA0BgNV
HSUeLTAhBggrBgEFBQcDAQYIKwYBBQUHAWIGCWCGSAGG+EIEAQYKYZIAyB4RQ
QEI
ATALBgNVHQ8EBAMCAQYwEQYJYIZIAyB4QgEBBAQDAgEGMDEGA1UdHwQqMC
gwJqAk
oCKGIGh0dHA6Ly9jcmwudmVyaXNpZ24uY29tL3BjYTMuY3JsMA0GCSqGSIb3DQEB
BQUAA4GBAAgB7ORoIANC8XPxl63unx2sZUxCM+hurPajozq+qcBBQHNgYL+Yhv
1RPuKSvD5HKNRO3RrCAJLeH24RkFOLA9D59/+J4C3IYChmFOJI9en5leDCSk9dBw
E88mw0M9SR2egi5SX7w+xmYpAY5Okiy8RnUDgqxz6dl+C2fvVFla
-----END CERTIFICATE-----
```

7. Restart the ListManager tclhttpd web server.

**Note:** ListManager 9.x uses OpenSSL 0.9.7. This version may give false positives under certain circumstances.

## Creating a Web Server for Action Tracking Only

---

Some security-conscious administrators of ListManager may want to use a stripped-down version of the ListManager Web Server that can be used for action tracking only, not for administrator or discussion forum access. They may then make this web interface available outside their firewall, while having the complete version accessible inside for administrative purposes.

By stripping out these interfaces, the only interaction that an outside user can have is to get responses to tracking-type events, such as clickthroughs, clickstreams, Interest Tracking, and Purchase Tracking.

Check with your sales representative before you create a second webserver; most ListManager licenses are restricted to allowing one webserver to connect to a ListManager instance

## Installing and configuring the secondary Webserver

The secondary (secure) webserver can be run on the same machine as ListManager and the primary (admin) webserver, or set up on another machine. In order for the secondary webserver to run on the same machine as the primary webserver, it's necessary that the combination of IP address and port number are unique. The best practice would be to have two IP addresses on the machine, and have each webserver bind to one of the IP addresses. Then access to the webserver can be controlled at the corporate (or even machine) firewall.

Here are the steps for creating the secondary web server.

### Secondary Web Server

1. Check with your sales representative before you create a second webserver; most ListManager licenses are restricted to allowing one webserver to connect to a ListManager instance.
2. If installing on a secondary machine, run the ListManager installer on the secondary machine. Provide bogus information for the database configuration, and skip over database creation.
3. Copy the whole tclweb directory structure to a new location (either on the same server or to another server)
4. Edit the tclhttpd.rc to specify the IP address and port number for the server. You will need to edit the following entries.
5. Config host
6. Config https\_host
7. Config port
8. Config ipaddr
9. Config https\_ipaddr
10. Config tclport\_ip (IP address of the server hosting ListManager).
11. If the webserver is installed on another server, you will need to specifically allow it to connect in ListManager's GUI security settings. In the left Navigation bar, click [Utilities: Administration: Server: Server Settings: Security: GUI Hosts](#), and add the IP address of the webserver host to the TCLPORT hosts textbox

### Secondary Webserver Service

To install the secondary webserver as a Windows service on the same host as the primary server:

1. Copy tclweb\bin\reg.txt to reg2.txt
2. In the two places ListManagerWeb appears, replace with ListManagerWeb2
3. Fix the directory path in these two variables:
4. Application
5. AppDirectory
6. Copy tclweb\bin\mksrv.bat to mksrv2.bat
7. Where ListManagerWeb appears, replace with ListManagerWeb2.
8. Where reg.txt appears, change to reg2.txt.
9. Run mksrv2.bat to install the ListManagerWeb2 service, and make sure it runs.

### Securing the secondary webserver

1. Open a command prompt.
2. Change directory to ~tclweb/htdocs/css.
3. Remove all files in the css directory **except** .tclaccess.
4. Change directory to ~tclweb/htdocs, and then remove all subdirectories EXCEPT css, libtml, img, scripts, subscribe, templates and utilities. Under utilities, you can remove everything except the directory path utilities\debug\logs\ (needed for web logs)
5. Remove all files with the pattern \*.\* except home.tcl and .tml.

Following these steps should leave you with the following files and directories in the htdocs directory: css, img, libtml, scripts, subscribe, templates, utilities, .tclaccess, .tml, home.tcl. These files need to be present for the webserver to function.

Once you've created a stripped-down web interface, you will need to redirect users to use this secure webserver instead of your administration web server. In the administrative web interface, go to [Utilities: Administration: Sites: Edit Site: Essentials](#), and add the URL for the secure webserver to URL to Web Interface. All future clickthroughs will be sent through that webserver.

Additional steps can be taken to lock down privileges in a manner that can be used in conjunction with the above steps, or instead of those steps.

ListManager allows you to lock-down the IP addresses of users who are allowed to log in as certain roles. In the Server settings, you can go to [Utilities: Administration: Server: Server Settings: Security: Web](#), and provide IP addresses and IP address ranges for allowing logins. Typically, you might have the following entries:

```
10.0.0.0-10.255.255.255
127.0.0.1
```

which would allow you to access the interface from the internal network only, and from the machine hosting the web server. You need to adjust the ranges for your network, and you can add IP addresses for people outside your network to log in as administrators as well.

## Adding a Robots.txt File

---

ListManager's web interface may be indexed by search engine robots (alternatively called web crawlers, spiders, webants and worms) like any other web site. In some cases, users may not want their ListManager archives indexed, or they find that indexing overloads their ListManager web server.

To specify particular directories robots should not visit, you may add a robots.txt file to the ListManager /tclweb/htdocs directory. For more about robots and using robots.txt to exclude them, see <http://www.robotstxt.org/>.



# Rebranding ListManager

## Rebranding ListManager

---

The "Lyris ListManager" brand is visible in several places:

- As a logo in the discussion forum interface
- As a logo in the administrator's interface
- In email messages sent from the server
- In the banner when mail is sent to the server

If you have a rebrandable license, you can rebrand everything listed above. If you don't have a license, you can only rebrand the discussion forums. For further information about rebranding licenses, contact your account representative at [sales@lyris.com](mailto:sales@lyris.com).

### Rebranding the Administrator's Interface (i.e., replace the logo in the upper left corner with your own logo)

The logo is a graphic named "background.gif" which is located in this folder:

```
~\tclweb\htdocs\img\global\
```

It is inserted into the ListManager interface due to being referenced in this style sheet:

```
~\tclweb\htdocs\css\styles.css
```

To remove this logo and replace it with your own, do one of the following:

#### Create a new graphic that replaces the existing one

1. In the global folder, rename the existing "background.gif" file to "background\_original.gif."
2. Create a new graphic containing your logo and name it "background.gif."
3. Save the new graphic to the **global** folder.
4. If the web interface is running, refresh the screen to see the change.

**Important:** The dimensions of the image can be no larger than 1200 x 400.

#### Create a new graphic and then reference it in the style sheet

1. Create a new graphic containing your logo and name it anything you want.
2. In the **css** folder, open the style sheet named "styles.css."
3. Search for the "background.gif" text and replace it with the name of your new graphic.
4. Save and close the style sheet.
5. If the web interface is running, refresh the screen to see the change.

### Rebranding the Discussion Forums

The procedures are the same as those listed above for rebranding the administrator's interface with one difference: the graphic file is named "background-mri.gif" instead of "background.gif."

### **Change the Email Messages Sent from the Server and Remove the Branding on the Lower Portion of the Screen**

If you have a rebrandable license for ListManager, you can edit the email messages ListManager sends from the server. By default, the name used for these messages is **Lyris ListManager**, and the email address is **lyris-admin@yourserver**. To change the name, run the **rebrandname** command from the ListManager command prompt. This also removes the Lyris branding located at the bottom of the screen:



#### **To use the rebrandname command**

1. Open a command prompt, and then change to the ListManager directory.
2. Type the following:

```
lm rebrandname your name
```

#### **To change the email address**

1. Open a command prompt, and then change to the ListManager directory.
2. Type the following:

```
lm rebrandemail name
```

ListManager will insert everything after the @ sign, so only include what should go before the @ sign (e.g., acme-support).

**Important** ListManager must be restarted for these changes to take effect.

#### **Changing the Information Displayed for EmailAdvisor**

The image and contact information for the EmailAdvisor service can be changed in [Utilities: Administration: Server: Server Settings: Advanced: Enable Features](#).

**Note** See [Customizing the ListManager Web Interface](#) for more details about customizing the ListManager web interface.

## **Security Considerations**

### **Security Considerations**

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Server administrators must consider carefully how they will control access to ListManager's functions in addition to securing ListManager, its database and webserver on their network. The administrative roles assigned to individuals determines

their access to ListManager's various functions. Access to the ListManager web interface and message archives may also be restricted.

Other security considerations include limiting who may join a list, see the list's members and may post messages through the list.

## Security of the Web Interface

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ListManager supports a number of features for controlling access to the web interface. These features are:

### **Name/password access**

Both the user and administrator portions of the web interface require a username and password. In the case of members, the username is always the email address. For administrators, a password is required. For users, the list administrator can decide whether passwords should be used at all, optional or required.

### **Administrator Interface**

The administrator web interface requires a user name and password. Server administrators may restrict other admins to particular areas of the interface by assigning them the appropriate [administrative role](#) or by using [permission groups](#) to allow or deny access to particular pages.

### **Limit by TCP/IP Address**

Access to the interface may also be restricted by IP address; see [Utilities: Administration: Server: Server Settings: Security: Web](#) for more information.

### **Administration Web Server**

Some security-minded administrators may wish to protect access to the ListManager web interface by putting it behind a firewall, and then install a [stripped-down ListManager web server](#) to process tracking and other user events.

### **Access to List Archives**

By default, the messages sent through a list are visible in the Discussion Forum Interface to both members and visitors. To restrict visibility of these archives, change the settings in [Utilities: List Settings: Discussion Forum Interface: Message Reading: List Visibility](#).

Note that if you do not require your members to have passwords, then non-members may be able to get their way into your mailing list and read the archives if they know just the email address of a member on your list.

If this concerns you, you can set your mailing list to [require member passwords](#). List members can have a link to reset their password emailed to them by going to the [Discussion Forum Interface](#). If they fail to log in on the My Forums tab, they will have the opportunity to have a link to reset the password emailed to them.

List admins can have a link to reset their password emailed to them if they fail to log into the [admin interface](#).

### **Custom Web Interface**

The web interface is written in Tcl and the complete source code is included. You are welcome to change the web interface to suit your needs. No royalties are paid to us and no permission need be requested of us in order to do this. Some people write just a few pages for subscribing and unsubscribing, and do not show their "public" users that the ListManager web interface even exists.

## **Subscription Security**

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### **Who May Join?**

By default, ListManager lists are "open", meaning no administrator needs to approve a member. You may make individual lists private, closed, or password protected in [Utilities: List Settings: New Subscriber Policy: Security](#).

Furthermore, you may wish to restrict your mailing list to only allow subscription requests performed using the web interface. For instance, you could put your web interface on an Internal-access only web server, so that outsiders cannot get to it. This would allow you to have an "open" mailing list, where people in your company could join by getting to the web interface form, but outsiders could not. Subscription options may be selected in [Utilities: List Settings: New Subscriber Policy](#).

ListManager also supports explicit banning of members, and the "reverse banning". The ban member feature would allow you, for instance, to ban someone who was an employee of a competing company from joining your mailing list.

Reverse banning is a setting which allows you to ban everyone *except* those that match your pattern. An excellent use of this feature is to have a corporate mailing list that is open, so that anyone in your company can join easily and automatically, but that nobody from the outside can join. To do this, you would tell ListManager to ban all addresses not having your corporate domain name on their email address, for example "acme.com".

### **Private Lists**

A private mailing list is one where only people who a list administrator as personally approved are allowed to join the mailing list.

With a private mailing list, people can request to join the mailing list, by filling out the Join web page or sending in an email request. With a private list, people who request to join are not enabled until the list administrator approves them. Whenever someone requests to join, the list administrator(s) can receive notification of the join request, and approve or reject them.

To create a Private mailing list, create a mailing list as you normally would, using the Create Mailing List web page. Then, in [Utilities: List Settings: New Subscriber Policy: Security](#), select Private.

After you have created your list, you will want to create a member who is a list administrator, and who receives the email notifications of the join requests. Go to [Utilities: Administration: Administrators: List Admins](#) to create additional list administrators.

Now, whenever someone asks to join the mailing list, you will receive an email notification of their request. You will then be able to approve or reject them with an email command, and the notification message will tell you which commands to send back to approve or reject the person.

## Confirmed Subscriptions

ListManager can send a "confirmation request" when a person asks to subscribe to a mailing list. The confirmation request message is sent to the email address that was subscribed. The person must receive this confirmation request message, and reply to it, in order for the membership to be activated. With a confirmed subscription, ListManager has proven that the email address given to it is indeed the email address of the person who requested the subscription.

Confirmed subscriptions prevent two problems:

1. People sometimes join a mailing list under a fake email address, in order to post harassing or otherwise inappropriate messages to the mailing list. With a confirmed subscription, people must use an email address that they can receive email at, which provides a "paper trail" that points back to a real person.
2. In order to harass other people, some malicious people will subscribe the other person to mailing lists that the person never asked to be signed up to. If enough mailing lists are involved, the person may receive a huge amount of email and this can be a real inconvenience to them. This is especially a problem when a web form is used to subscribe people, as it is very easy to enter someone else's email address in that form. Confirmed subscription solve this problem, because the person being abused gets the confirmation request, and does not confirm, so that they membership is never activated.

You may configure subscription confirmations in [Utilities: List Settings: New Subscriber Policy: Confirmation](#).

## Unsubscribing

There are many ways to unsubscribe from a ListManager mailing list:

- Log into the [discussion forum interface](#), select My Forums, and click "unsubscribe" next to a list.
- Send the command "unsubscribe listname" to listmanager@your-server-name.com.
- Send the command "unsubscribe listname your-email-address" to listmanager@your-server-name.com.
- Forward any posting you receive from a mailing list to the unsubscribe-listname@your-server-name.com address.
- Click on an unsubscribe link provided in an email message.

If an unsubscribe request is made with the "unsubscribe" command sent to listmanager@this-ListManager-server.com, as in "unsubscribe jazztalk", then the

person named in the From: field is unsubscribed. If the email address named in the From: field is not a member, ListManager returns a message to that person saying that they could not be unsubscribed.

ListManager also provides the option of naming an email address on the "unsubscribe" command line, such as the command "unsubscribe jazztalk bob@example.com". In such a case, if unsubscribe confirmation are enabled for the list, then a confirmation message is sent to the subscriber, then ensure that they are same person and not that someone else is trying to unsubscribe them.

When mail is received at the "unsubscribe-listname@..." address, ListManager tries to determine who the subscriber is and automatically removes them. In most situations, this works very well.

The ListManager unsubscribing logic for unsubscribe requests received at the "unsubscribe-listname@..." is fairly sophisticated, and here is how it works. When ListManager receives a message to the "unsubscribe-listname@..." address, ListManager goes through the following steps:

1. First looks for X-Lyris-Member-ID in the header. If it's there, that's who gets unsubscribed. This catches almost all cases, except when the forwarding program strips out the headers (such as in this example).
2. Looks for a purgeid tag in the header (X-Lyris-To:) and then in the body. If it's there, that person gets unsubscribed. Note: purgeid tags are "cleaned up" before they are re-posted to a list (i.e., in quoted message), by removing the square brackets. In the example below, the square bracketed email address clearly identifies "wantsoff", so that who gets unsubscribed. Also note that MS-Mail generated addresses with the text [SMTP:...] are correctly skipped by ListManager.
3. Looks at the Return-Path (the MAIL FROM:<> sender), and sees if it's a member. If it is, then this is likely a forwarded message, and unsubscribe that person. Pegasus Mail does this.
4. Finally, if none of the above is valid, the person named in the From: header is unsubscribed.

You may have ListManager always send [unsubscribe confirmations](#), or only when the unsubscribe request is questionable (e.g., when the address being unsubscribed is different from that in the email header).

## Access to the List of Members

---

In the old days of the Internet any person on the Internet could obtain a list of members for any mailing list. This was done so that members could know who else was on the mailing list and also to facilitate unsubscribing in certain cases.

These days, there are unscrupulous people looking to get your member list so that they can send junk mail to them. In addition, obtaining the member list makes the security easier to "crack", especially if there are no member passwords.

For these reasons, ListManager defaults to only letting the list administrator (and by extension, site and server administrators) obtain the member listing. The member list is obtained with the "review" command, which must be preceded with a password with the "login" command.

Optionally, a mailing list can be set up to allow members to obtain the member listing with the review command. In this case, the authentication is done on the From: address, which must match a member address and the listing is only sent to that member address.

If security is not a concern, you can elect to make your member listing available to anyone. These three options (admins/members/anyone) are available in the list settings under [Utilities: List Settings: Discussion Group Features: Security](#).

## Security for Posting Messages

---

The From: field in email messages is insecure. Many email clients allow you to tailor the From: field to say absolutely anything you want. Thus, it is easy for anyone to send mail to someone else and have a forged From: line.

There are many ways ListManager may validate that email messages it received should be posted through the list:

### Verification of Email Address

When mail comes into a mailing list for distribution, ListManager looks at the From: header, extracts the email address and looks the email address up in the list of members for that list. If the email addresses match, the message is assumed to be from that member. If they do not match, ListManager rejects the message.

### Verification by Name

ListManager can also verify the identity of a poster by matching the name with the member's full name, if the option [Allow Name Match](#) in Utilities: Administration: Server: Server Settings: Security: Spam Blocking is enabled.

If enabled, ListManager looks that full name up to see if they are a member of the mailing list. If the full name matches, then the posting is assumed to be by that member. ListManager uses this technique to work around a common problem with list managers: if only members are allowed to post and the list manager knows people only by their email address, then people with multiple email addresses will be continually refused the right to post, because their alternate email addresses are not listed as members. Since ListManager matches on the email address, and if that fails, on the full name, in a wide variety of situations it correctly identifies the member and their posting is not refused as being "not from a member of this list".

However, this feature can also let spam or viruses post to the list if the name in the From: field matches the name of any member. Therefore, it is disabled by default.

### Restrict Posting to Administrators

By default, email marketing and announcement style lists only allow administrators to post messages through a list. However, due to the risk of forgery, even these lists should require moderation. See [Utilities: List Settings: Email Submitted Content: Security](#) for more information.

### Moderation

A list may be set to require moderation of all messages. When a list is moderated, an administrator must approve the message before it is sent to the list. ListManager supports various levels of moderation; see [Utilities: List Settings: Email Submitted Content: Security](#) for more information.

### **Restrict Email Posting**

A more radical step is to disallow email submissions entirely and only use the web interface to create messages. Yet even more secure would be to put the web interface behind a firewall, so that outsiders cannot get to it, or to put it in an undocumented server location, so that other people do not know it is there. See [Utilities: List Settings: Email Submitted Content: Security](#) for more information.

### **Allow Non-Member Posting**

By default non-members cannot post to a mailing list. This can be disabled, to allow non-members to post. If new member moderating is on, the postings from the non-members are treated as new member postings, and are moderated. Non-member posting may be enabled in [Utilities: List Settings: Discussion Group Features: Security](#).

### **Match Phrase Protection**

Recipients may need to include a specified word in their postings in order to be accepted. If the word is missing, the message would be rejected. See [Utilities: Automated Messages: Match Phrases](#) for more information.

### **Password Protected Posting**

All postings to the mailing list must have the sender's password in the first line, in the format `PASSWORD:user_password`. See [Utilities: List Settings: Email Submitted Content: Security](#) for more information.

### **Bans**

[Members: Bans](#) prohibit posting from rejected addresses. Because the From: field may be forged to be from an accepted address, bans do not provide sufficient protection.

### **Anonymous Postings**

Some kinds of mailing lists benefit from allowing people to be anonymous when they post. For example, an employee suggestion discussion might need to be anonymous, as might a psychological support group.

ListManager supports Anonymous mailing lists, by removing all identifying marks from the headers of the messages distributed to the mailing list. The From: defaults to "Anonymous" and can be set to something else if desired.

If a list is moderated, the moderator will see the real author of the message before approving it, and it will "anonymize" when distributed.

Of course, this feature cannot read, so if the message content contains something, which identifies the person, ListManager cannot do anything about that. Thus, people should remember to not include their personal mail footers when posting to an anonymous mailing list.

To make your list anonymous, go to [Utilities: List Settings: Discussion Group Features: Message Look](#).



### **Maximum Messages Per Day**

This setting limits the total number of postings to mailing list, in one day. Some mailing lists may want to set an upper limit on the activity of a mailing list and can use this feature to do it. This limit applies to all postings by all members of the mailing list. See [Utilities: List Settings: Discussion Group Features: Message Rejection Rules: Etiquette](#).

### **Maximum Posts Per Member**

On a discussion mailing list, some people will occasionally write the majority of the email messages, thereby stifling the conversation and keeping other people from feeling comfortable posting their messages. Also, some people may write several small messages, when it would be better if they had combined their thoughts into one message.

For these reason, you may want to impose a "maximum posts per member, per day" limit. If a member goes over this limit they must wait until the next day to post another message. See [Utilities: List Settings: Discussion Group Features: Message Rejection Rules: Etiquette](#).

### **Reject Email Attachments**

Many email programs include attachments automatically when they send messages out. Sometimes, these attachments are a graphic logo of the mail program, sometimes they are a digital signature and sometimes they are files for other purposes. Some people prefer their mailing lists to only contain "pure" email, with no attachments, and want to reject messages that contain attachments. A [Match Phrase](#) can be set up to scan for attachments and reject messages that contain them.

## **Extending ListManager with Programs**

### **How can I extend ListManager with my own programs?**

---

ListManager allows you to add your own programs into the ListManager execution stream. Extensions can be added to match phrases, auto-responders, list postings, and the listmanager@ ListManager address.

Your scripts can let the normal ListManager execution stream continue, or they can interrupt it.

For example, you can write an extension that logs each use of an auto-responder. This would allow you to keep track of when people received information, and you could use this information to follow up with them. Or, perhaps your auto-responder is programmed to send one document to people inside your company and another document to people outside your company. In such a case, your program would actually replace the default auto-responder behavior.

Another use of technology would be to extend the checking ListManager does on list postings. For example, your script might count the number of greater-than symbols,

(">") which indicate message quoting, and refuse messages postings where the bulk of the posting is a quote of someone else's message.

To add your own extensions to ListManager, you need to tell ListManager when you want it to run your program. In the configuration screens for Match Phrases and Auto-Responders, List Settings and Server Settings, there are two fields for extension scripts. This gives you the option to run a script before the default ListManager action takes place, and to run a script after the action has taken place.

With an auto-responder extension, your script will be run any time an email message comes in to the auto-responder's email address. This is similar to adding a program to the Sendmail "aliases" file.

With a match phrase extension, your script will be run any time the match phrase is found in the context it is defined for. For example, you could trap for offensive words in a message posting to your list, and your script would be run when the match phrase saw them. Note: Match phrases can be attached to auto-responders, list postings, and the listmanager@ address, so that multiple scripts can be run. For instance, if you have a match phrase extension, and an auto-responder extension, if the match phrase is found on that auto-responder, it will run, and then the auto-responder extension will run.

With a List extension, your script is run any time a posting is made to the mailing list. You can prevent the list posting from being accepted by deleting it before the default action is taken.

With a listmanager@ extension (set in the server configuration page), you can add your own processing to the processing of ListManager commands, which ListManager does.

You can write your script using any programming language, though we recommend using a language that has access to the ListManager API, such as Perl or C/C++. You will need to pass the Message ID over the command line, by specifying \$MESSAGEID on in your extension command line. So, for instance, if you are on Windows, and have a Perl script named "lyrext.pl" that you want to run, your command line might be:  
c:\perl5\bin\perl.exe c:\scripts\lyrext.pl \$MESSAGEID

This runs the Perl interpreter (*perl.exe*) against your *lyrext.pl* script, and passes the Incoming Message ID on the command line.

Normally, your script will use the Message ID to load the message in question, and perform some action. By default, when your program exits, ListManager will continue processing the message. However, if you want ListManager to stop processing the message after your script has run, you should delete the Message. In Perl, this is done with the command `&InMailDelete($MessageID);`

For more information about programming and ListManager, see the Programmer's Guide at [http://www.lyris.com/lm\\_guide/](http://www.lyris.com/lm_guide/).

## How do I validate Email Addresses in my Perl programs?

---

If you are writing your own CGI form for subscribing people, we recommend that you validate the email addresses that are entered on the web form. Otherwise, people will often enter invalid email addresses, and then wonder why they are not receiving email from you. For example, a common mistake is for people to leave the ".com" off their address, as in "bob@aol" or "jane@juno".

This Perl subroutine will check to make sure the email address you give it looks valid, trim any starting or trailing white space and return the email address to you. If the email address was not valid, it will return a blank string.

Note: This subroutine does not check that the email address actually exists on the Internet, or that the domain name is valid, only that that the format of the email address is correct. In our experience, this catches the majority of problems.

```
$a = "john\@example.com";
print &CheckEmailAddress($a);
sub CheckEmailAddress() {
# This regexp validates the format of an email address. It
returns the cleaned
# version of the email address, or blank if the address was not
valid.
#
# An email address must be of the form:
# 1) (trim any spaces or tabs or linefeeds or carriage returns)
# 2) (possibly one quotation mark)
# 3) (one or more characters for username, excepting a quotation
mark)
# 4) (possibly one quotation mark)
# 5) @
# 6) (one or more characters for hostname(s), excepting [ <>\t])
# 7) .
# 8) (two or more characters for top-level-domain, excepting [
<>\t])
# 9) (trim any spaces or tabs or linefeeds or carriage returns)
#
# 1 2 3 4 5 6 7 8 9
#
# .....'''.....'''.!!!!!!..!!!!!!.....
# .....
# $ [0] =~ /[ |\t|\r|\n]*\"?([^\"]+\")?@[^\ <>\t]+\.[^\ <>\t][^\
<>\t+)[ |\t|\r|\n]*;/
return $1;
}
```

## Customizing the ListManager Web Interface

---

The ListManager web interface is written in Tcl, and is designed so you may edit it to add or remove features, or to change its look and feel.

A guide to the ListManager GUI Programming API is available as part of your ListManager installation in `~tclweb\htdocs\docs\api`.

The discussion forum interface may be [customized to have your own logo](#). The ability to have your own logo in the administrators web interface is an additional cost option. Contact [sales@lyris.com](mailto:sales@lyris.com) if you are interested in rebranding ListManager.

Lyris Technologies can assist you in customizing the web interface. Contact your account representative at 800-768-2929 for more information.

## Admin FAQ

### IIS and ListManager

---

IIS frequently binds to all IP addresses on a machine by default, even when configured not to do so. Users who want the ListManager web server to coexist with IIS will need to configure IIS so it does not bind to all IP addresses on the machine. See the following Microsoft IIS related links:

IIS binds to all IP addresses: <http://support.microsoft.com/?kbid=259349>  
Disabling socket pooling: <http://support.microsoft.com/kb/238131/EN-US/>  
Disabling socket pooling for IIS SMTP service:  
<http://support.microsoft.com/?kbid=281760>  
Metabase method for disabling socket pooling has no effect:  
<http://support.microsoft.com/default.aspx?scid=kb;EN-US;813368>

### Whitelist Complaint Handling

---

In an effort to fight spam

while delivering opt-in messages, many email providers have implemented whitelists, or lists of senders who have agreed to their whitelist guidelines to ensure they will not be automatically filtered as spam. Typically, the organization wanting to be whitelisted must sign an agreement to remove subscribers who identify the sender's mail as spam and to set up a feedback loop.

The email provider then emails information about the complaint to the sender, so the recipient may be removed.

ListManager can automate the handling of these messages so that complaint notifications sent by the email provider to the specified address will:

- Automatically delete any active mailings for the member
- Unsubscribe the member
- Ban that member from the list, so the member may not be re-added
- Log the complaint, viewable in Reports: Members: Member Complaints and recorded in the lyrMemberComplaintLog table.

#### **To create the feedback loop email address**

The server administrator must create an [autoresponder](#) that processes the message as a complaint, and then inform the email provider that all complaints must be sent to that address.

#### **To create this autoresponder**

1. In the left Navigation bar, click **Utilities**, point to **Automated Messages**, and then click **Autoresponders**.
2. Click Create New Autoresponder.
3. For **Email Address Prefix**, enter the email address prefix the complaints should be sent to. For example, if you enter *aol-complaints*, you should inform AOL that complaints should be sent to *aol-complaints@yourserver.example.com*.
4. For **Document Title**, select **(none)**.
5. Select the **Advanced** tab.
6. For **Applies To**, select **entire server**.
7. For **Special Mail Handling**, select **Complaints**.
8. Click **Save**.
9. Inform the email provider to send complaints to the autoresponder you have specified.

## SPF and Fighting Spam

---

### What is SPF?

SMTP, the protocol used to send and receive email, has a serious security flaw: it does not check and see if an email message is really coming from the email address in the From: field.

Spammers use this security flaw to hide the true source of their email. Viruses also spawn email with forged headers, disguising the contaminated computer as they attempt to infect others.

SPF (Sender Policy Framework) is a proposed authentication protocol designed to help fight spam. It works by checking to see whether email really comes from who it says it comes from in the email header.

### How does SPF work?

SPF works by adding additional information in a domain's DNS record specifying which machines may legitimately send email for that domain.

The owner of a domain (e.g., *example.com*) already notes in its DNS records which computers should be used to receive mail for that domain. SPF works by adding additional information to the DNS record specifying which computers are authorized to *send* mail for that domain.

When mail servers receive email, they can check which computers are authorized to send mail for the domain of the email address in the From: field, and see if this message actually came from one of those authorized computers. If it did, the message is assumed to be legitimate and allowed through. If it did not, or if it is questionable, the receiving mail server can accept the message, mark it and accept it, or refuse to receive it.

### **How can SPF help ListManager?**

ListManager receives mail for a number of email addresses, such as join addresses, leave addresses, and list posting addresses. These addresses, like any other email addresses, may receive spam or be the subject of virus attacks.

Beyond the additional load on ListManager to handle these messages, there are additional problems with the kinds of spam ListManager gets.

When spam is received for join addresses (e.g. join-listname@example.com), the From: address of the spam is added to the list. Generally, these are fake email addresses, but sometimes (in the case of a virus) they are legitimate addresses which then receive unsolicited email from the ListManager list.

Spam sent to leave addresses (e.g. leave-listname@example.com) can unsubscribe legitimate list members, and thus prevents interested subscribers from receiving the email they opted in to receive.

Potentially the most dangerous spam for a ListManager server is that sent to posting addresses (e.g., listname@example.com). If the email header is forged so it appears to come from someone approved to send mail through the list, and the list is not moderated, the spam or virus is sent to the entire list.

By using SPF authentication on incoming mail, ListManager can check if an incoming message is coming from where it says it coming from. If not, ListManager can reject these messages, or mark them so they may be identified later. By rejecting mail that fails SPF "early" in the mail transaction (before the entire message has been received), ListManager has more capacity to handle legitimate email.

SPF authentication may be configured on the server level at [Utilities: Administration: Server: Server Settings: Security: Spam Blocking](#).

### **What limitations does SPF have?**

In order for SPF authentication to work, domain holders must publish additional information in their DNS records. SPF adoption is still in its early stages, so not all domains have an SPF record. However, SPF has been adopted by AOL and Microsoft, so it is likely that many domain holders will begin to publish SPF records, and as they do so more and more ISPs will use SPF to validate email.

SPF does not prevent spam with legitimate domains (e.g., from "throwaway" domains used once and then abandoned). Spam sent by computers that use the right domain in the From: field will also not be blocked by SPF.

### **Can SPF help ListManager deliver email?**

It can, if you publish SPF information for your ListManager server's domain. More information about SPF and the kind of DNS record you need to make can be found at <http://spf.pobox.com/>.

# Making ListManager Run Faster

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This is a list of techniques we have found which can have an effect ListManager performance, and make it run faster.

## **Limit SMTP error logs**

Receiving detailed SMTP logs for a list posting can sometimes be the only way to track down problems. However, keeping track of all this information can have a performance penalty on your ListManager server. Use detailed SMTP reports only when critical to solve delivery problems.

**Do not receive Error Mail Notifications** If you are set as a list administrator, have a large mailing list (10,000+ members), and set yourself to receive error mail notifications, you will be asking ListManager to forward every copy of Error mail on to you. This increases the amount of work ListManager needs to do when it receives error mail.

**Do not disable error mail handling** By default, ListManager will keep track of error mail, and a point each day that a user bounces mail (when a transient or permanent failure occurs). After a number of points configured in the List Settings screen, a user is put on hold. Do not turn this mechanism off for large lists, as you will be telling ListManager to send mail to all your email addresses, even those that are invalid. We find that up to 10% of a mailing list's addresses go bad every month. Not letting ListManager clean up the list of members for you adds significantly to the load. See [Utilities: List Settings: Automatic Maintenance](#) for information on how to set your lists up to properly hold and purge members.

**Purchase the "Plus", "Diamond", or "Extreme" version of ListManager.** If you are unsure as to whether a different license can help you, contact us at [sales@lyris.com](mailto:sales@lyris.com) for a free time-dated enhanced serial number, which will provide you with a limited-time opportunity to see that version in action.

**Make sure you have enough memory** Many sites are out of memory, and running on virtual memory (hard disk swapfile). The most important measurement on Windows and Unix systems is the total memory that your processes are using. If your processes are using more memory than you have physical memory, then you are low on memory, and likely using your swapfile heavily.

## **Make sure you have sufficient bandwidth**

The [recommended bandwidth](#) for the various license levels may be insufficient for your needs if you are sending out large messages, or if ListManager is sharing its bandwidth with other applications.

## **Notify held members infrequently**

On large lists, ListManager will be identifying many members with email problems and putting them on hold. If you use the hold notify feature, where ListManager sends a notification message to held members, do so infrequently, such as on a 4 or 5 day interval. Sending held notifications every night tends to use a lot of CPU power just to try to send mail to people who probably are not receiving it anyway.

## **Limit the amount of Tcl scripting in a mailing**

Extensive tcl scripting to customize messages can slow down mailings, as more processing must be done for each message.

## How can Members "expire" after a certain time period?

---

In the settings for each user, you can set the number of days for which the membership should last. ListManager will automatically "expire" that member once their membership runs out.

For instance, you can set the expire date to "365" to give your members a one year membership to a group.

After a member expires, they are not erased. Their membership settings are kept, but their "status" changes to "expired" and they are no longer able to participate. To reinstate them, you need only change their "status" to "normal". See [Members: New Member: Settings](#) for more information.

## How do I make a Mailing List that sends to several Mailing lists?

---

Making lists that have as members other lists is called a parent-child relationship for ListManager. The "Parent" has the list names of other ListManager lists as members of the list. When a posting is sent to the Parent all "child" lists get distributed to. There are several settings that need to be configured correctly for this arrangement to work. See [Utilities: List Settings: Basic Information: Enable Features](#) for more information.

You may also select several lists to send to at one time when creating a mailing. See [Mailings: New Mailing: Recipients](#) for more information.

## How do I subscribe people automatically?

---

You may create a web subscribe form in ListManager that you may put on your Web site. See [Utilities: Web Forms: New Subscribe Form](#).

Another simple method for subscribing people automatically is to send a message on their behalf to subscribe-listname@... using a program.

On Unix, you do this by using Sendmail.

On Windows, you can use the "Blat" command line program to send an email message. Blat is available at: <http://gepasi.dbs.aber.ac.uk/softw/Blat.html>

The command to send an email message to ListManager to subscribe someone on Windows is:

```
echo subscribe | blat - -server 207.105.6.126 -f john@example.com -t sub-nt-list
```



You will need to change the john@example.com to be the address to be subscribed and the TCP/IP address to be the IP address for your ListManager server.

Another option is to write a SQL insert statement to be processed directly against your SQL Server. This is a faster method of getting data into the SQL Server, but perhaps a bit more complicated. The members\_ table has defaults for most columns, so the insert statement needs to only provide a few key fields.

## What Happens to Bad Mail Addresses?

---

If ListManager is unable to send mail to an address after all its retry attempts it counts as a bounce for that email address. Only one bounce will be counted against a member per day.

Once the number reaches the value set in Utilities: List Settings: Automatic Maintenance, then that email address is put on hold and regular mailings will not be sent to them until they are unheld.

Depending on how your list is set up, held users may or may not be deleted after a specified length of time. You also have the option of periodically notifying users who are on hold to give them the opportunity to unhold themselves.

Often, email addresses are not permanently bad. For example, addresses sometime exceed their mailbox size and cannot receive mail. But, when the user clears their mailbox, they are able to receive mail again.

This is the reason why ListManager may take several days of transient failures before holding email addresses since many mail problems are temporary. But transient delivery problems may also indicate a permanent delivery problem, as in the case of an abandoned email account which is permanently full.

For detailed information on how to configure the handling of error mail, see [Utilities: List Settings: Automatic Maintenance: Error Mail](#).

Note that failed send attempts are recorded in the lyrCompletedRecips table: a total of the number of bounces for an address is no longer contained in the members\_ table.

## What machine should I buy to run ListManager?

---

ListManager is a very fast and powerful program, but the hardware it runs on will influence its speed. If you are running lists with hundreds of thousands of members or otherwise just want the speed to be better, it is recommended that you have a machine for running the ListManager executable that is separate from the machine running the SQL Server software. By splitting the work between two (or more) machines, you can get better speeds through ListManager.

If speed is less important than costs, you can run ListManager and the SQL Server on the same machine. In this case, you will need a relatively new CPU, several hundred megabytes of RAM, and at least a few gigabytes of hard drive space available. See [www.lyris.com](http://www.lyris.com) for more specific recommendations.

The hardware for a client (ListManager) machine doesn't generally need to be as robust as the hardware for the SQL Server. Generally, the client machine doesn't need big or fast hard drives, since little data is stored on the client, and the client doesn't use a large amount of RAM. Therefore it is recommended that you buy a modern single CPU and a few hundred megabytes of RAM (see the Lyris Web site at [www.lyris.com](http://www.lyris.com) for more specific numbers), but otherwise invest money in the server if you want to improve performance.

The SQL Server should have large, fast disks. The more RAM it has the less it needs to get from the hard drive, so more RAM will improve the performance. If your budget allows it, hardware-based RAID controllers are probably the fastest method to control hard drives.

See [Memory and Bandwidth Recommendations](#) for more information.

## What about my existing Web Server?

---

If you already have a web server installed on your machine, or you plan to install the web interface on a separate machine, the ListManager Web Server will install on port 81 instead of port 80. To access the ListManager web interface, go to:

`http://yourdomain.tld:81/`

However, if you plan to use ListManager for tracking (opens, clickthroughs, clickstreams), we recommend you install ListManager on a dedicated ListManager machine.

## Why does ListManager not use Sendmail?

---

ListManager relies on its own sending and receiving mailer instead of Sendmail. Why is this?

Many, many reasons. The major problem with list managers is maintenance. With ListManager having its own mailer, it knows exactly what the problem is, the instant it occurs. Also, if ListManager used Sendmail to receive email, it would have to rewrite Sendmail's `/etc/aliases` file, and that wouldn't be very elegant.

More importantly, ListManager doesn't do what other list managers do for mail sending efficiency. The other list managers send one message to a list, and use a huge BCC: list to get it out. When someone posts to a mailing list, exactly the same message is sent to every member of the list. The problem with this approach is that when permanent failures come back, it is very difficult to determine which user bounced it, because every message was the same.

ListManager makes every message unique, with an X-Lyris-Member-ID and X-Lyris-Member-Name SMTP header. Then, when a permanent failure message comes in, it becomes very easy to tell who did it and to automatically process them.

If you sent every message uniquely with Sendmail, you would get very little mail out, as Sendmail forks (makes a completely new copy of itself in memory) for each message, and so the number of concurrent copies of Sendmail you can run is fairly small. The ListManager mailer is multithreaded, so it takes up very little memory for each message send and very little CPU time. ListManager can run several thousand concurrent mail sends, even on a 64MB machine.

We're also seeing very fast message delivery times as a result of the low CPU demands and efficient memory usage.

The decision to leave Sendmail behind was crucial to the design of ListManager. It will coexist with Sendmail on the same machine. But, it will not use Sendmail for its own mail operations.

If you are running Sendmail or some other mail transfer agent, ListManager will relocate it to another TCP/IP port, and take over SMTP port 25. ListManager first receives all incoming mail. If the incoming mail is not addressed to a ListManager email address, ListManager automatically passes the email off to the relocated Sendmail program that processes it as normal. With this technique, both ListManager and Sendmail can coexist on the same machine, and there are no strange configuration tricks to play.

And, of course, having our own mailer means we can easily support many different operating systems, since we don't have to rely on the eccentricities of each platform's different mailing methods.

## How can I be certain my Email Messages were delivered?

---

ListManager will not consider a message successfully delivered until the receiving mail server has responded with a code indicating it was successfully accepted. If that doesn't happen, ListManager will continue to retry the message at the interval set in the retry schedule, and for the number of retries specified.

The progress that a posting is making can be seen in the web interface by clicking on [Mailings: Mailing Status: All Outgoing Mailings by Date](#), and then selecting the message in question. This screen displays the number of addresses that have received the message, as well as the number that have had transient delivery problems. It also shows how many times ListManager has retried the message, and allows you to set the message to "Done".

## Why Do My CSV Downloads Look Strange in Excel

---

If you have HTML in any of your mailings, you may find that CSV downloads of mailings tables look strange when you open them in Excel

ListManager is providing the data in the correct format, but Excel is changing the formatting because it sees an <HTML> or <body> tag. Excel attempts to display the

document as it thinks it should be shown, instead of leaving it in a table format. If the file is opened with a plain text editor, the file will be displayed properly (though not in a table format).

## How Can I Work Around DNS Settings in ListManager?

---

ListManager includes its own DNS resolver optimized to perform at the high speeds ListManager requires to send mail out quickly. Your network environment may be such that you must change the DNS resolver's default settings.

### DNS Ports

The DNS resolver initiates the transaction on port 53, and the data returns on some higher port. Most firewalls can keep state appropriately - they recognize that the request was initiated internally, and allow the inbound connection on the higher port. However, your firewall may need some additional rules to permit DNS information to be returned correctly to ListManager. Administrators concerned about having higher ports available in their firewall may [specify the port settings for the DNS binding](#) through the administrator interface.

### Internal DNS Routing

ListManager uses external DNS information for sending mail to your domain, which can cause problems with some firewalls. Instead of delivering to the internal IP address, ListManager will use the external DNS information for your domain, requiring the mail to go out through the firewall and then back in again. If your firewall refuses this kind of traffic, use [DNS Bypass](#) to specify how ListManager should route mail correctly inside your firewall.

### Alternate DNS Resolver

Administrators may specify an alternate DNS from the one packaged and used by ListManager. Lyris does not recommend specifying an alternative DNS server. Lyris strongly recommends that you use the integrated DNS resolver built into ListManager. If your organization's policy requires use of your own DNS server, understand that Lyris cannot guarantee the standard high-speed and highly accurate ListManager performance. Lyris provides only limited technical support for alternate DNS configurations.

If you understand these conditions and still need to use your own DNS resolver, run an SQL command to insert the DNSServer key into the lyrConfigClusterSettings table ([queries may be run from the Administrators's interface](#) within ListManager). For example, to specify an alternate DNS server with the IP address 192.168.223.125, run the following SQL query:

```
update lyrConfigClusterSettings set DNSServer='192.168.223.125'
```

Note: ListManager must be restarted for this change to take effect.

# Email Commands

## Email Commands

---

Members and administrators may use email commands to subscribe and unsubscribe, change member settings, and retrieve list and member information.

Early email list management software programs did not have a web interface to facilitate list and member management; all administration was performed by sending email commands to the server.

The ListManager web interface allows members and administrators to interact with ListManager without email commands, but email commands are still useful in situations where the web interface is not available. The email commands may also be used by scripts to add, edit or delete members.

### How Email Commands Work

Email commands may be sent in one of two formats:

1. Commands may be sent to the `listmanager@server` command address: `listmanager@theserverhostname`. The commands the sender wishes to perform are part of the body of the message, e.g., `join listname`. Many commands may be included in one message. This method is generally used by list administrators adding, editing or unsubscribing members, but may also be used by members who wish to edit their settings.
2. Commands may be sent in the email address itself, so a sender may send a message to `join-listname@theserverhostname` and be added to the specified list name without a message body.

When ListManager receives a command via email, it looks at the email address the message was sent From: and performs the request if its list and server rules permit. It then sends a response to the requestor unless the *quiet* command is used to suppress the response.

### Legacy Commands

ListManager will also accept mail for most of the common list manager addresses. With ListManager, you have the option of several different kinds of command syntaxes. Wherever possible, it was made to be compatible with the command syntaxes of other list processor programs, so that users can use the command they are familiar with, and are not required to learn something new.

### Invalid Commands

When ListManager sees an invalid command, it takes note, and moves to the next line. If more than ten lines in an email message are invalid, the message processing stops.

For example, consider an administrator who sends a series of commands to ListManager, but the administrator misspells one of the commands. In such a case, the correctly spelled commands will be executed, and an email message will be sent to the person indicating which commands were successfully processed and which lines in the email message did not appear to be ListManager commands.

If you are having problems sending email commands to ListManager, try sending the message in plain text. HTML formatting may add extra lines to the beginning of the message, and may change the commands so they are illegible to ListManager.

### Signature Detection

Since so many people on the Internet use signatures, ListManager has a built-in signature detection mechanism. The purpose of this mechanism is to stop processing the message, which prevents signature lines from generating errors in the response email ListManager sends out. Detecting a signature is analogous to issuing the "end" command.

This mechanism looks for either of these character strings: "--", "\*\*\*", or "==". Once one of these strings is encountered, ListManager stops processing the message immediately. Please note that this mechanism is not fully activated in a MIME-encoded message, because in that case the "--" *may* be a content type separator, and in that case the message still needs to be processed. The exception is if the MIME type is "text/plain", in which case the parser still check for "---", since it isn't oddly encoded.

## Subscribing

---

### subscribe-listname

To subscribe to a list, send an email with no message to *subscribe-listname@yourserver* or *listname-subscribe@yourserver*.

For example:

```
subscribe-jazztalk@example.net  
jazztalk-subscribe@example.net
```

The following words may be used instead of *subscribe*:

- sub
- join
- on
- signon
- subscribe
- subscibe (a common misspelling)
- suscribe (a common misspelling)

ListManager will automatically determine, by receiving the email, that the person wants to subscribe to a list called "jazztalk", and it will automatically determine their email address and name.

Note: If your list is password protected, then users cannot use this form of subscribing, and must instead send mail to *listmanager@yourserver* or send mail to *listname-request@yourserver*.

### Subscription Options

Members may specify their membership type (that is, the kind of mail they would like to receive) when they subscribe by specifying the option in place of the word subscribe.

Example:

```
digest-jazztalk@example.net
```

The following may be used instead of *subscribe* to join a list with the specified membership type:

```
digest
mimedigest
index
nomail
```

### Subscribing with the Listmanager@ Command

You can subscribe to a mailing list by sending a subscribe command to the listmanager@yourserver.com address. The listmanager@ address is referred to as the "ListManager" address in this documentation.

When sent to the ListManager address, any of the following subscribe syntaxes are acceptable:

```
subscribe listname
subscribe listname password
subscribe listname "your name"
subscribe listname "your name" password
subscribe listname password "your name"
```

The *password* syntaxes are only applicable if the mailing list is password protected, and in such a case the password must be specified at subscription time in order to be accepted. In the cases where the person's name is specified next to the Password, ListManager is able to extract the password from the text, and correctly understands that what remains is the person's name.

In the above prototypes, the *your name* labels are place holders where the person subscribing can insert their name. The person's name does not need to be two words—all the words in double quotes will be understood as the person's name.

For instance, the following subscribe command is valid:

```
subscribe jazz-discuss "Mr. James Barton Smith"
```

If the subscriber does not specify their name on the subscribe command line, ListManager will attempt to determine the person's name from their email address. For example, if their email message says:

```
From: James Smith <jsmith@acme.com>
```

ListManager will extract the name *James Smith* and apply it as part of this member's subscription settings.

### The *quiet* modifier

If you add the word "quiet" to the *subscribe* command, ListManager will not send a confirming message back, unless the subscription fails for some reason. For instance, for a list called "jazztalk", you could join it with this command:

```
subscribe jazztalk quiet
```

The public domain list server "majordomo" uses a "listname-request@yourserver.com" address, and ListManager supports this convention for compatibility.

When sent to the *listname*-request address, any of the following subscribe syntaxes are acceptable:

```
subscribe
subscribe password
subscribe "your name"
subscribe "your name" password
subscribe password "your name"
```

All these ways of joining a mailing list is equivalent. It is up to you which method you decide to tell your users to use. There is no "Best Way", just a way that you are most comfortable with.

## Posting to a List or Segment

---

### Contributing to a List

Members can post to the list by sending their message to: *listname@yourserver*

For example:

```
jazztalk@lists.example.com
```

### Contributing to a Segment

To send a message to a particular segment, the address is the listname, followed by a period, the subset name, and the name of the server. For example, if the list name is "jazztalk" and the segment name is "events", and the server is named "example.com", you would write to the following address:

```
jazztalk.events@lists.example.com
```

## Unsubscribing

---

### leave-listname

To unsubscribe from a list, send an email message to *leave-listname@server* or *listname-leave@server*. Example:

```
leave-jazztalk@lists.example.com
jazztalk-leave@lists.example.com
```

The following words may be used instead of *leave*:

- unsub
- uns
- unsubscribe
- unsuscribe (a common misspelling)
- signoff
- leave
- remove
- off



ListManager will look at your email address, determine if you are a member of the mailing list, and remove you from the mailing list.

### Unique Unsubscribe Address

If you are using the mail merge tag %%email.unsub%%, a unique unsubscribe email address will be generated for each recipient. See [Mail Merge Short Tags](#) for more information. Example:

```
leave-jazztalk-354-5684q@lists.example.com
```

This unique address includes the message ID of the mailing so ListManager can track which mailing a member unsubscribed from. It also includes the member ID and a check character so ListManager can unsubscribe the member even if the message is forwarded to another email address. The check character ensures that recipients cannot simply change the member ID and unsubscribe another member.

### Unsubscribing When Using the Listmanager@ Command Address

You may also unsubscribe by writing to the listmanager@ command address. To do so, send a message to *listmanager@yourserver* with the command *unsubscribe listname*. ListManager will unsubscribe the address the message is from.

You may request ListManager unsubscribe a different email address or member by member id with the syntax *unsubscribe listname emailaddress*:

```
unsubscribe jazztalk jane@example.com  
unsubscribe jazztalk 234654
```

Whenever this method is used, for security purposes ListManager will send a notification to the address with your original request attached so that you are notified whenever someone who does not appear to be you attempts to unsubscribe you.

### Purge

To unsubscribe from all the ListManager mailing lists on a server, send the *purge* command to listmanager@:

```
purge
```

The *purge* command is also available as a Command address, by sending mail to *purge@hostname...*

## Resuming a Held Membership (unhold)

---

If your email address has been bouncing email for several days, ListManager may put your membership on "hold" and stop sending you electronic mail. In such a case, send the "unhold" command to the [ListManager listmanager@ address](#), and ListManager will return any "held" subscriptions back to "normal." The format of the unhold command is:

```
unhold
```

Or, send a message to *unhold@listmanagerhostname*.

## The List Owner Address

---

Email Address: Owner-Listname@ and Listname-Owner@

Mail sent to this address will be distributed to the owners of a mailing list who have specified that they want to receive owner mail. Note that mail sent to these addresses will not be subject to match phrases.

## Listmanager@ Server Email Command Address

### The Listmanager@ Server Address

---

All email commands may be sent in the body of messages sent to the server email command address listmanager@. For example, to subscribe to a list, a member may send a message to the listmanager@ address and include the *subscribe listname* command in the body. For example, to subscribe to the jazz-talk list on a server with the host name *example.com*, the subscriber would send the following to *listmanager@example.com*:

```
subscribe jazz-discussion
```

ListManager will understand commands entered on the subject line and in the body of the message.

Multiple commands can be issued, each on a separate line. For example, to subscribe to two mailing lists and leave another in one email message:

```
subscribe jazz-discuss
subscribe rock-discuss
unsubscribe opera-discuss
```

To determine the listmanager@ address for your Site, take the host name you created for that Site, and prepend "listmanager@" to it. For example, if your Site's host name is *minerva.example.com*, your Server address is *listmanager@minerva.example.com*.

### Listmanager@ Alternatives

The following are alternative addresses for listmanager@:

```
listmanager@
list@
lists@
listserver@
listname-request@
```

In addition, you can define additional listmanager@ addresses to rewrite an address to be listmanager@. For instance, you can specify that *mailing-lists@* be rewritten as *listmanager@*, and this would allow people to send ListManager commands to *mailing-lists@your.hostname.example.com*.

You may also [rebrand ListManager](#) so that the rebrand name may be used as a listmanager@ alternative.

### The *Listname-Request* Address

Email Address: listname-request@

Purpose: An alternative to listmanager@, this email address will accept all ListManager commands. By adding the listname in the address, it does not need to be specified in the command (but it will work fine if it is).

Example address: [jazztalk-request@example.com](mailto:jazztalk-request@example.com)

Example command: "subscribe"

When commands are sent to this address, all the same commands work, but the listname is no longer needed in the command. For instance, one command to subscribe to a mailing list is:  
subscribe listname

That command syntax will work for any of the ListManager addresses. However, if the command is sent to listname-request, such as jazz-request@example.com, this command is enough, since the list name is clear from the mailing address:  
subscribe

## Set Membership Settings

---

These commands change a member's settings when sent to the [listmanager@ server email command address](#). Members may use these settings to set their own settings, or administrators may do so after using the *become* [command](#).

### The *set* Command

To change your membership settings for a list, use the *set* command:

```
set listname [option] [option]
```

Note that you must specify the list name; you may not wildcard the list name with \*.

When sent to the *listname-request*@ address, the command syntax is:

```
set [option] [option]
```

You can place as many options on the *set* line as you wish.

You may set any field in the members table. Examples:

```
set jazztalk digest
set jazztalk nomail noack quiet
set jazztalk email=bob@example.com
set jazztalk oldpw=flower pw=hamburger
set jazztalk setfield(address="150 Main St. Anywhere, CA 94704")
end
```

### Change Email

To change your email address, use the email= option. The syntax for this command is:

```
set listname email=new-email-address
```

For example, if you are currently subscribed to *jazztalk* with the address *bob@example.com* and want to be subscribed as *bjones@example.com* you would send the command:

```
set jazztalk email=bjones@example.com
```

### Notes

- The text after the email= cannot have any spaces in it.
- If you change your address with the email= command, you will receive a message notifying you of the change even if you use the [Quiet modifier](#). This is done as a security measure.

### Change Membership Type

To change the type of messages you receive, use the set command with one of these keywords:

*Mail* - Receive mail as it is contributed.

*Digest* - Receive daily digest with all the messages of the day.

*MIMEDigest* – Receive daily digest with all the messages of the day in MIME format.

*Index* - Receive daily index of the subject lines of the messages of the day.

*Nomail* - Receive no mail.

Example:

```
set jazztalk digest
```

### Password

You can set your password with the *pw=password* command. For instance, if you do not currently have a password, to set it on the *jazztalk* list to be *hamburger*:

```
set jazztalk pw=hamburger
```

To change your password, you must first specify your current password with *oldpw=password*. For example, if your current password on the *jazztalk* list is *flower* and you want to change it to *hamburger*, you would write:

```
set jazztalk oldpw=flower pw=hamburger
```

Including a password in an email message is inherently insecure. If you are concerned about password security, do not use email commands that require a login command.

### Acknowledgement

To set whether or not you receive a message confirming the message was sent, use *set* with one of these keywords:

*ack* - When contributing to the mailing list, receive a confirmation message each message was distributed.

*noack* - When contributing to the mailing list, do not receive a confirmation message that the message was distributed.

Example:

```
set jazztalk ack
```

## Repro (Copy of Postings)

To determine whether or not you receive a copy of your own postings, use the set command with one of these keywords:

*repro* - Receive a copy of messages you contribute to a mailing list when the messages are distributed to list (this is the default)

*norepro* - Do not receive copies of your own postings.

Example:

```
set jazztalk norepro
```

## Comment

You can change your "comment" to be anything you like. The "comment" information is not used by ListManager for any purposes: it is merely a placeholder for any information you care to place in there. For example, you might use it to store the city you live in.

To set the comment, use the comment= keyword, as in:

```
set jazztalk comment=Washington
```

Note: The text after the comment= may have spaces if surrounded by quotation marks:

```
set jazztalk comment="Washington, DC"
```

## User ID

You can change your "user id" to be anything you like. The "user id" information is not used by ListManager for any purposes: it is merely a placeholder for any information you care to place in there. For example, you might use it to store your social security number, or perhaps the Member ID from some other database.

To set the user id, use the userid= keyword, as in:

```
set jazztalk userid=045-76-1230
```

Note: The text after the userid= cannot have any spaces in it.

## Other Member Settings

To change any field in your members table, use the setfield(fieldname=value) option. The syntax for this command is:

```
set listname setfield(fieldname=value)
```

For example, you may have added a field to your members table to record members' phone numbers, called *phone*. If you're currently subscribed to *jazztalk* and you'd like to change your phone number, you'd send the command:

```
set jazztalk setfield(phone=800-768-2929)
```

To set a value with spaces, use quotation marks. For example, if your database had a field for a user's complete address, called *address*, it could be set like so:

```
set listname setfield(address="2070 Allston Way Berkeley, CA
94704")
```

This command is useful if you're using an email message to the server to add people to the list with additional information by using the [become command](#).

Note that the field is case sensitive. For example, `userid_` would fail, as the correct field name is `UserID_`.

### The Quiet Modifier

If you add the word "quiet" to the set command, ListManager will not send a confirming message back, unless the set command fails for some reason. For instance, for a list called "jazz-discuss", you could set your membership to digest with this command:

```
set jazz-discuss digest quiet
```

Note that the "quiet" modifier is a valid argument to the unsubscribe command. The modifier must be after the list name or the email address. The modifier will prevent the Goodbye document from being sent to the unsubscriber.

The "end" command tells ListManager that there are no more email commands to process in this message. ListManager will stop processing your message when it sees the "end" command. The "end" command is optional. If you do not include it, ListManager will automatically scan to the bottom of your message for commands.

Here is an example:

```
subscribe jazztalk
set jazztalk digest
end
```

If you add the word "quiet" to the end command, ListManager will not send a confirming message back, unless there was a problem executing the command.

## Determining Membership Settings

---

The following commands are equivalent and will return an email message with your membership settings on the mailing list:

```
query listname
confirm listname
```

When sent to the *listname*-request address, the command syntax is just the single command, as in:

```
query
confirm
```

To determine which mailing lists running on that server you are a member of, use the *which* command

```
which
```

Additionally, the *which* command will inform you of those lists you have unsubscribed from, if that data is available.

## The Line Continuation Character

---

Many ListManager commands require that all information for the command be contained on one line. If your ListManager command will not fit on one line, you can use the line continuation character to tell it that the next line in your message should be treated as part of this line. The line continuation character is the ampersand character.

For example, a simple subscribe request, such as:

```
subscribe jazztalk Robert Smith
```

can be written with the line continuation character as:

```
subscribe jazztalk &  
Robert Smith
```

or even as:

```
subscribe &  
jazztalk &  
Robert &  
Smith
```

The slash character ("\") can be used as a line continuation character, instead of using the ampersand. For example:

```
subscribe \  
jazztalk \  
Robert \  
Smith
```

Another example of a good use of the line continuation character is multiple commands to the listmanager@ address, i.e., to unsubscribe multiple members using the **Delete** command:

```
login xxxxxxx  
delete listname quiet &  
Member1@example.com &  
Member2@example.com &  
Member3@example.com &  
end
```

You may also use "<<" and ">>" to delimit a list of items that should be considered as a single line.

For example:

```
login xxxxxxx  
add jazztalk <<  
Member1@example.com  
Member2@example.com  
Member3@example.com  
>>
```

By using the "<<" and ">>" delimiters, you don't have to place a "&" or "\" at the end of each line.

## The End command

---

The "end" command tells ListManager that there are no more email commands to process in this message. ListManager will stop processing your message when it sees the "end" command. The "end" command is optional. If you do not include it, ListManager will automatically scan to the bottom of your message for commands.

Here is an example:

```
subscribe jazztalk
set jazztalk digest
end
```

If you add the word "quiet" to the end command, ListManager will not send a confirming message back, even if there was a problem executing the command.

## Administrator Email Commands

### Administrator Email Commands

---

ListManager has a number of commands specific to administrators to allow adding or unsubscribing members, moderating messages, and retrieving list information.

The administrator must write to the listmanager@ server address using a list, site or server administrator email address, and use the login command to provide the admin password.

Note that if you are using a script to subscribe members using admin email commands, you may need to put in a [loop exception](#) for the admin email address. You may also want to use the *end quiet* command so notification about the command is not returned.

#### Login

All administrator email commands require the admin password to be provided in a login command in the first line to authenticate the sender as an admin with the rights to use the administrator commands.

Syntax:

```
login password
```

ListManager will use the email address the message is sent from to identify the sender as a Server, Site or List Administrator, and then check the password provided in the login command. If the password you specified with the login command is correct, it will proceed to process the commands in the message. If it is not, processing of your message will stop.

When ListManager detects a login command, it replaces the password with an XXX in the archived copy it keeps, and in the acknowledgement message that is sent back to you. The reason for this is so that other people looking at your email message, either in your mailbox, or in the incoming mail web page, will not be able to determine your password.



However, including a password in an email message is inherently insecure. If you are concerned about password security, do not use email commands that require a login command.

### End [quiet]

Like non-administrative members, administrators may also use the `end` command to indicate that ListManager should stop processing any additional text in the message.

```
end quiet
```

The *quiet* modifier is optional.

When the command interpreter encounters the *end* command, it stops processing the message immediately. Thus, if you use *end*, you must be certain to have all of your commands above it. If you use the *quiet* modifier, you will not receive notification from ListManager regarding that command message.

## Adding Members (Administrators)

---

### add

The *add* command lets a list administrator add a member to their list. The syntax of the *add* command in its simplest form is:

```
add listname [sendconfirm] emailaddress [name] [quiet]
```

The *sendconfirm*, user name and *quiet* modifiers are optional. Here is an example:

```
add jazztalk bob@example.com Bob Smith
```

The *add* command without modifiers subscribes the member as a normal member and sends them the default hello message. The administrator sending the command receives email notification if the command succeeded or failed. To suppress this notification message, the admin may end the message with *end quiet*.

If you do not specify a user name, the user will be created with no name in their member record.

If the list you are adding the user to is set to require passwords, one will be created automatically for that member. It is useful if you include the `%%url.resetpassword%%` tag in your hello message allowing the recipient to reset the password.

ListManager will not resubscribe existing members, or change a membership status from *unsub* to *normal* unless the *subform* modifier is used.

### sendconfirm

The *sendconfirm* modifier subscribes the member in *confirm* status and sends a confirmation message asking the member to confirm.

Example:

```
add jazztalk sendconfirm bob@example.com Bob Smith
```

### quiet

The *quiet* modifier suppresses sending the new member the default hello message.

```
Example:add jazztalk bob@example.com Bob Smith quiet
```

This command adds the member without sending the member notification. The administrator sending the add command will still receive notification of the success or failure of the add command unless the message ends with the *end quiet* command.

### subform

Unless the *subform* modifier is used, the *add* command will not change the subscription status of current members. The *subform* modifier adds members so their membership status will be *normal*, even if they were previously in the list in an inactive status.

For example:

```
add jazztalk subform user1@example.com
```

would change the status of user1@example.com from unsubscribed to normal.

## Adding Many Members

---

The *add* command requires all the information for the command to be on one line. To add multiple members with one add command, [line continuation characters](#) may be used. The same modifiers for adding single members may be used for adding many members.

The syntax below uses the ‘<’ and ‘>’ operators to delimit a list of names to be added. The syntax to add many members is:

```
add listname [quiet] [sendconfirm] [subform] <
User Name1 emailaddress1@example.com
User Name2 emailaddress2@example.com
>
```

If you want to add members with user names, the user name must be *before* the email address.

Example:

```
add jazztalk quiet <
User Name1 user1@example.com
User Name2 user2@example.com
>
```

Any text that is not a legal email address is assumed to be a name. For example, if you attempted to add user1@example@com, the address would not be added or shown as part of the list of email addresses successfully added, nor would there be an error message. It would be considered part of the name for the next address to be added if there is one, or ignored.

### quiet, sendconfirm and subform

The *quiet*, *sendconfirm* and *subform* modifiers are optional, and work exactly as they do when adding a single member. In the case where you add many members, a *quiet* modifier suppresses the "hello" message, a *sendconfirm* modifier sends a confirmation message to each member, and a *subform* modifier sets the membership status of currently subscribed members to *normal* regardless of previous membership status.

### Line Continuation with \ or &

Alternatively, you can use the "\ " or "&" characters to separate each name, rather than delimiting the entire group. The example below uses "&" to continue the line:

```
add jazztalk quiet &
user1@example.com &
user2@example.com
```

### Full List

If the site or server administrator has [limited the membership size of a list](#), ListManager will send you a message if you are approaching the member limit. While ListManager is processing your add request, it also checks to see how close you are to your member limit. If your add request brings your list to within 5% of the limit, ListManager will inform you in the email notification you receive unless the message uses the *end quiet* command.

Below is an example of what ListManager sends you when your member list is approaching its limit:

```
Note: This list is close to its maximum subscriber limit, with
only 5 new subscriber positions available.
```

## Adding To Many Lists

---

The administrator *add* command may also be used to add members to many lists at once as an extension of the regular syntax:

```
add listname1 listname2 listname3 [onehello][oneconfirm | sendconfirm] emailaddress
```

The *onehello*, *oneconfirm*, and *sendconfirm* modifiers are optional. You can use either *sendconfirm* or *oneconfirm*, but not both.

### onehello

If you specify the *onehello* modifier, the new member will receive a single hello document, from the first list listed. This allows you to add a member at once to many lists without bombarding them with a slew of hello documents.

Example:

```
add jazztalk ticketlist concertgroup onehello bob@example.com
```

The above example adds bob@example.com to the jazztalk, ticketlist, and concertgroup lists, and only sends the hello document from 'jazztalk'.

### oneconfirm

If you specify the *oneconfirm* modifier, the new member will receive a single confirmation request. Responding to the single confirmation will confirm all lists.

Example:

```
add greenlist redlist bluelist oneconfirm bob@example.com
```

The address bob@example.com will be added to the greenlist, redlist, and bluelist lists, and sets his membership status to *confirm*. Since greenlist, redlist, and bluelist are set to require confirmations, a single confirmation will be sent to him, which he can reply to in order to confirm for all three lists.

### **sendconfirm**

The *sendconfirm* modifier sends the new member a confirmation message for each list you add them to, as long as the list requires confirmation.

Example:

```
add greenlist redlist bluelist sendconfirm bob@example.com
```

The address bob@example.com will receive a separate confirmation message from greenlist, redlist, and bluelist, assuming they are all lists which require confirmation.

### **Adding Many Members to Many Lists**

You may add many email addresses to many lists, all in a single *add* command:

```
add jazztalk ticketlist oneconfirm onehello <
bob@example.com
blue@example.com
hey@example.com
>
```

## **Become**

---

The *become* commands allows administrators to "become" an address, assuming their email address and name, and issue ListManager commands on their behalf. For instance, an administrator can become another person, and issue the "subscribe" command for them and then "set" other membership options.

There are two possible syntaxes for the *become* command:

```
become email-address
become email-address Full Name
```

The first format only specifies an email address. The name is then left blank.

The second format species both the email address and name of the person you are becoming. All words after the email address are understood as being the name.

The *become* command is only available to administrators. You must issue the admin [login command](#) before using the *become* command.

### **Example Using *become***

```
login p@55w9rd
become joe@example.com
set jazztalk digest
```

```
set jazztalk email=joebob@example.com
set jazztalk setfield(address="150 Main St. Anywhere, CA 94704")
end quiet
```

## Delete (Unsubscribe)

---

The **Delete** command lets an administrator unsubscribe a member. You must issue the admin [login command](#) before using the **Delete** command.

The syntax of the **Delete** command is:

```
delete listname emailaddress [quiet]
```

The quiet modifier is optional. The abbreviation *del* may be used instead of the word **Delete**. For example:

```
del jazztalk bob@example.com
```

By default, the member unsubscribed will receive the goodbye message for the list. To suppress this message, use the *quiet* modifier:

```
delete jazztalk bob@example.com quiet
```

However, if the **Delete** command does not succeed, such as if the email address is not a member, you (the person submitting the **Delete** command) will be notified unless the message ends with *end quiet*.

The delete command does not actually delete the member from the database. The member is still part of the list, but is unsubscribed. They will not receive normal postings from the list.

### Delete with Member ID

As an alternative to providing an email address, you can use the member id of the member you wish to delete. For example, if you know member with id 1234 needs to be removed from the list, but you don't know that member's email address, you can use the member id without a problem. An example:

```
delete jazztalk 1234
```

You can specify any number of members to delete on the command line. For example, to delete the users "bob@example.com" and "jane@example.com", you would write:

```
delete jazztalk bob@example.com jane@example.com
```

or

```
delete jazztalk <
bob@example.com
jane@example.com
>
```

### Delete from All Lists

To delete an address from all lists, replace the list name with an asterisk *\**.

Example:

```
delete * bob@example.com
```

You may use this syntax to delete multiple members from all lists on your server:

```
delete * bob@example.com jane@example.com
```

or

```
delete * <  
bob@example.com  
jane@example.com  
>
```

### Delete all members in a List

To unsubscribe all members (except admins) from a list, substitute "all" for the email address.

Example:

```
delete jazztalk all
```

## Send

---

The *send* command is only available to administrators. You must issue the admin [login command](#) before using the *send* command.

The *send* command allows you to email a ListManager document to any number of email addresses. For instance, if you receive a request to join a private list, you might want to send the applicant a document describing the guidelines for being allowed into the mailing list. Or, if you have an announcement you would like to make to a number of people, you can use the *send* command to send a "one time message" to them, without the work of creating a mailing list.

The syntax of *send* command is:

```
send document-name email-address [email-address] ...
```

The document-name must be a currently existing ListManager document.

You can also use [line-continuation characters](#) to specify as many email addresses as you like, without being restricted by the length of a line.

For example:

```
send I am going on vacation \  
john@example.com \  
jane@example.com \  
bob@example.com \  
robert@example.com
```

or

```
send I am going on vacation <
john@example.com
jane@example.com
bob@example.com
robert@example.com
>
```

The From: and Reply-To: of the message sent is by default the email address and name that you are issuing the *send* command from. If you would like the From: and Reply-To: to be something else, you can use the *become* command to assume another identity, and then use the *send* command with that identity.

## Member

---

The *member* command allows administrators to accept a member who has subscribed to a [private mailing list](#).

The syntax of the *member* command is:

```
member approve member-id ...
member reject member-id ...
```

The only options for the *member* command are to either approve or reject a membership application to a private mailing list.

You can specify more than one Member ID on the *member* command line.

If you are a list administrator set to receive admin mail, and your mailing list is set to private, then you will receive email notifications of applications to join your private mailing list. The notification message will include the *member* command you need to send back to approve or reject the member. In addition, if there are any other pending members, these will also be listed, at the bottom of the notification message, along with commands to approve or reject them.

### Example

Here is an example of a notification message an administrator receives when someone applies to join a private mailing list:

```
List: test-1
Name: Some Name
Email: adasf@example.com

A request from 'adasf@example.com' to join the private list
'test-1' has been received.
Their subscription request will not be activated until an
administrator approves it.
---
To approve this member, send the following two line message to
listmanager@lyris.example.com
login (enter your password here)
member approve 122
---
To reject (delete) this member, send the following two line
message to listmanager@lyris.example.com
login (enter your password here)
member reject 122
```

```

-----
The following members are currently pending:
* Member 116 (yourcompany@example.com)
* Member 117 (logika@example.com)
* Member 118 (assf@example.com)
* Member 120 (assfasf@example.com)
* Member 121 (assfdasf@example.com)
* Member 122 (aassfdasf@example.com)
---
To approve these members, send the following two line message to
listmanager@lyris.example.com
login (enter your password here)
member approve 116 117 118 120 121 122
---
To reject (delete) these members, send the following two line
message to
listmanager@lyris.example.com
login (enter your password here)
member reject 116 117 118 120 121 122

If you approve a member, they will receive this email message
(and the Hello document, if your list defined one):

Your request to join 'test-l' has been approved.

You are now a member of 'test-l'.
If you reject a member, they will receive this email message:

Your request to join 'test-l' has been rejected.

If you wish to discuss this with a mailing list administrator,
you can send email to owner-test-l@lyris.example.com

```

## Which (for admins)

---

The *which* command allows an administrator to determine which mailing lists a particular person belongs to.

The syntax of the *which* command is:

```
which emailaddress
```

You can specify as many email addresses on the *which* command line as you like.

For example, the follow commands are valid:

```
which bob@example.com
which jane@example.com albert@example.com
```

Note: If you do not first login as an administrator, the *which* command will tell you which lists *you* are on.

## Moderate

---



The *moderate* command allows administrators to act upon a moderated message contributed to a mailing list.

The options for the *moderate* command are to either approve or reject a contributed message to a moderated mailing list. If you are a list administrator set to receive moderated message notifications, then you will receive email notifications of each moderated message. The notification message will include the *moderate* command you need to send back to approve or reject the messages. In addition, if there are any other pending messages, these will also be listed, at the bottom of the notification message, along with commands to approve or reject them.

The basic syntax of the *moderate* command is:

```
moderate [approve | reject] moderate-id
```

You can specify more than one Moderate ID on the *moderate* command line.

Example:

```
moderate approve 2345 2346
```

This command approves and immediately sends the messages with the moderate ID numbers 2345 and 2346.

### **Scheduling a Message Using *moderate***

Alternatively, you can schedule a message to be released at a specific time, or resubmit a message such that it sends again after a specified period of time. To schedule a message for release at a specific time, the syntax is:

```
moderate time [hh:mm | yyyy/mm/dd] moderate-id
```

Example:

```
moderate time 13:10 2007/01/01
```

Thus, if you want to schedule a message to be released today, you can specify the exact time you want the message to go out, in 24-hour format (24:00). If you want to schedule the message for release for some date in the future, you must specify the date in yyyy/mm/dd format, such as 2000/05/02 (May 2, 2000).

### **Resubmitting a Message for Auto-Approval Using *moderate***

To resubmit a message for auto-approval on a periodic basis, the syntax is:

```
moderate resubmit numdays moderate-id
```

Example:

```
moderate resubmit 30 2112
```

In the above example, the message with ID 2112 would be resubmitted and automatically approved every 30 days.

### **Moderation Notification Messages**

By default, ListManager sends out MIME-digest moderated message notification. The digest consists of two parts: the first part is the notification with the message appended, and the second part is the message all by itself.

If the message contains mail merge tags, ListManager will merge them in prior to sending the moderated message notification to you. Thus, you can view the message exactly as it will go out to the list.

The following message is an example of a moderated message notification. The beginning of the message explains the purpose of the message, and at what time (if any) the message will be automatically approved. Commands for approving or rejecting this message via email are given. The message in question is then displayed. At the bottom of the email message, the currently pending moderated messages are summarized, and commands for approving or rejecting them in bulk is also given.

```
The following message destined for bach has been received. This
message requires your approval before it will be sent to the
list.
If you take no action, this message will be automatically
approved at midnight tonight.
---
To approve this message, send the following two line message to
listmanager@lyris.example.com
login (enter your password here)
moderate approve 103
---
To reject (delete) this message, send the following two line
message to listmanager@lyris.example.com
login (enter your password here)
moderate reject 103
---
From: michael@example.com
Subject: Great new CD
that new recording of the Brandenburg Concerto is really good!
Michael Smith
-----
The following moderated messages are currently pending:
* Message 100
* Subject: Best recording available?
* Message 102
* Subject: My new piano
* Message 103
* Subject: Great new CD
---
To approve these messages, send the following two line message
to listmanager@lyris.example.com
login (enter your password here)
moderate approve 100 102 103
---
To reject (delete) these messages, send the following two line
message to listmanager@lyris.yourcompany.com
login (enter your password here)
moderate reject 100 102 103
You can configure ListManager to send out MIME-digest moderated
message notifications or standard moderated message
notifications by using the command line option
"moderatenotification" with either old (standard) or new (MIME-
digest).
```

# Report

---

The *report* command returns a "normal" Subscribe/Unsubscribe/Confirmation report.

The syntax of the *report* command is:

```
report listname [nochart | detail | CSV] [yyyymmdd-yyyymmdd]
```

The *yyyymmdd-yyyymmdd* modifier allows you to specify a starting and ending date. For example, to retrieve a report from January 1, 2000, to March 15, 2000, you would use the range 20000101-20000315, as shown in this example:

```
report jazztalk 20000101-20000315
```

By default the report is generated with a one-month history. Thus, if you do not specify a date range, the starting date will be one month prior to today, and the ending date will be today.

The *nochart*, *detail*, and *CSV* modifiers allow you to specify the format of the report you will receive. These modifiers are mutually exclusive.

When you use the *nochart* modifier, the report excludes dates that do not contain any data. For instance, if no one subscribed on 3/14/00, the report will not include that date in the 'subscribe' section.

When you use the *detail* modifier, the report has an additional section at the end of the general data section. This additional section includes the email addresses associated with the data points present in the general data section.

The *CSV* modifier tells ListManager that you would like the report sent to you as a series of comma separated files. When you use this, the ListManager will send you an email that includes as attachments up to seven data files. These are data files, and are not designed to be human-readable. However, they are readable by most spreadsheet and database programs. Specifically, the format of these files is known as comma separated values (\*.CSV).

You can use these files to synchronize your external database with your ListManager database. Since most database programs can read CSV files, these can be loaded directly into your database, where you can quickly run an update to put your database in synch with the ListManager database.

Six of the possible attachment files conform to the possible report types from the current report option. They are:

**Normal (subscribed) Members:** The new subscribers for the report period will be provided in the file "sub.csv".

**Unsubscribed Member:** Those members that unsubscribed during the report period will be listed in file "unsub.csv".

**Held Member:** Members who were put on hold during the report period will be listed in the "held.csv" file.

**Unconfirmed Members:** Those members that subscribed during the report period but have not yet confirmed will be listed in file "notcon.csv".

**Expired Members:** Those memberships that expired during the report period will be listed in the "expired.csv" file.

**Unapproved (private) Members:** The members who have subscribed to private lists and are still awaiting List Admin approval will be listed in "private.csv."

These data files are only attached to the email if they have any entries. For example, if no members were put on hold during the report period, there will not be a held data file attached to the email.

The column layout for these first six attachments is identical for all files. It is:

**Member ID,  
Email Address,  
Full Name,  
List,  
Date Joined,  
Expire Date,  
Number Bounces,  
Date Bounce,  
Confirm Date,  
Date Held,  
Date Unsubscribed,  
User ID,  
Comment,  
Additional**

If any of the fields is missing data (this is common), then nothing is displayed.

The seventh file attachment is the totals. This has the same information as the report command but in a vertical arrangement. There are two columns of data, the total description and the value for that section:

**Total normal members  
Total unsubscribed members  
Total held members  
Total expired members  
Total unapproved (private) members  
Total unconfirmed members  
New normal members  
New unsubscribed members  
New held members  
New expired members  
New unapproved (private) members  
New unconfirmed members**

This file is attached if there is any data at all.

## **Insertclicktracking**

---

The *insertclicktracking* command allows an administrator to insert a clickthrough event into the ListManager database via an email command.

Like other admin email commands, it requires the *login* command.

This command takes key-value pairs in fieldname "value" pairs.

Example:

```
insertclicktracking IPAddress "127.0.0.1" MemberID "123"  
MessageID "456" StreamWebPageName "homepage" TimeClicked  
"2004-03-04"
```

Any \ or " characters within the quotes must be escaped with a \ .

All of the clicktracking\_ fields except the ClickID\_ field may be populated with this command:

```
GroupID_  
IPAddress_  
MemberID_  
MessageID_  
StreamWebPageName_  
TimeClicked_  
UrlID_
```

If not specified, GroupID\_ will be set to 0, and TimeClicked\_ to the time inserted into the database.

## Retrieving Documents and Information

### Retrieving the Help Document

---

The following commands are equivalent and will return an email with a URL directing users to ListManager's online documentation:

```
help  
info
```

ListManager will respond with the following message:

```
Re: your help request  
> help  
  
Help is available at the Lyris ListManager Web Site:  
http://www.lyris.com/help
```

This message is not configurable. If you do not want ListManager to respond to this address, enter it in [Utilities: Administration: Server: Server Settings: Basic Settings: Remove Command Email Addresses](#).

### Review (Retrieve Mailing List Information)

---

The following commands are equivalent and will return general information about a given mailing list:

```
review listname
stats listname
```

When sent to the *listname*-request address, the command syntax is:

```
review
stats
```

To obtain a listing of the mailing lists running on a single site, using the *lists* command:

```
lists
```

By default, the *review* command will only return basic information about a mailing list. However, the list administrator can decide to have the *review* command return a list of members as well.

Also, the list administrator may decide to not allow non-members to view the basic information that the *review* command provides. If the list administrator does this, the *review* command will reply with a message indicating that this information is not available.

If the *review* command is given by an administrator, after the *login* command, then a full list of the email addresses of the members of the mailing list is also returned. If the list administrator has allowed it, the *review* command may also return a list of member names and email addresses.

### **review for Admins**

The *review* command normally returns basic information about a mailing list to the person who requested it. However, if the *review* command is requested by an administrator, after a *login* command, then the *review* command also returns a full list of the email addresses of the members of that mailing list.

Usage:

```
review listname [all | names | full | held | unsub | private | expired | confirm]
```

For example:

```
login saxophone
review jazztalk
```

There are many options for the *review* command. If no arguments are given then members of type 'normal' are returned. Below is a short description of the function of each:

*(none)* - return only those members who are of normal status ( default )

*all* - return members of all types.

*names* - return the email addresses and names only (for normal members only).

*full* - return email addresses, names, and other information (for normal members only).

*held* - return only those members who are on hold.

*unsub* - return only those members who have unsubscribed.

*private* - return only those members who are of private status.

*expired* - return only those members whose subscriptions have expired.

*confirm* - return only those members who are of confirm status.

Here are two examples of the *review* command with an option:

```
login saxophone
review jazztalk full
```

```
login saxophone
review jazztalk names
```

## Searching Message Archives

---

If you are a member of a mailing list, you can search past messages of the mailing list, and the messages that match your search specification will be sent back to you via email.

When sent to the [listmanager@ server command email address](#), the command syntax is:

```
search listname [search words] ...
```

Example:

```
search jazztalk oboe
```

ListManager will search for messages which contain any of the given search words. If multiple messages match your search, the search results will be organized so that the messages that matched more of your search terms appear at the top, and messages with equivalent search scores are organized with the newest messages first.

When sent to the *listname*-request address, the command syntax is:

```
search [search words] ...
```

You can also use the [discussion forum interface](#) to read and search past messages.

## Retrieving Documents using "GET"

---

Members of a mailing list can obtain the documents from a mailing with the *Get* command. The syntax for the *get* command

```
get listname document-name-or-range
```

Currently, two kinds of documents are available: "hello" and "goodbye". These are the documents that are mailed when someone joins the mailing list, and when someone leaves the mailing list. For example:

```
get jazztalk hello
get rock-discussion hello
```

The hello and goodbye documents can also be obtained by sending email to the Command-Listname address "hello-listname@..." and "goodbye-listname@..."

If you know the document ID or range of IDs of archived messages that you want to retrieve, you can also use the "get" command to retrieve specific message bodies.

For instance, if you subscribe to a mailing list with "index" mode, you receive a nightly summary of the messages from that day, with a *get* command pre-written to retrieve the message bodies.

The format of the *get* command for retrieving an archived message (or a set of messages) is:

```
get listname message-id [message-id] ...
```

or you can specify a range with:

```
get listname (first-message-id)-(last-message-id)
```

For example:

```
get jazztalk 100 105 106 109
get jazztalk 100-109
```

Similarly, you can retrieve all of the messages for a certain date by following the listname with a date or range of dates. The format of the date is *yyyymmdd*.

Usage:

```
get listname date[-ending_date]
```

Thus, if you are requesting messages for only a single date, you can follow this example:

```
get jazztalk 20000509
```

On the other hand, if you want to retrieve all the messages for February 2000, you would issue the following command:

```
get jazztalk 20000201-20000229
```

### Get Documents Example

This is a sample nightly index document from the NeoForum mailing list. Notice that the "get" command is pre-written for the user in the message.

CDLIST Index for Saturday, March 08, 1997.

```
-----
Subject: Re: results
From: Jason Smith <jsmith@example.com>
ID: 133
Subject: Re: Aborting a cd
From: Bob Jones <neo@elsewhere.com>
ID: 136
Subject: CD-Roms
From: mainp@domain.co.uk (Matt Smith)
ID: 139
Subject: Re[2]: Client/Server?
From: pben@mydomain.com
ID: 141
-----
```

To receive the full text of these messages, send the following command to `listmanager@lyris.yourcompany.com`

```
get cdlist 133-141
```



Or, you can retrieve specific messages with a command such as:  
get cdlist 133 136

-----

## Command Email Addresses

### Command Email Addresses

---

Email Address: *command@*

Examples: *purge@*, *unhold@*, *help@*, *info@* *which@*

Purpose: An alternate address for sending ListManager commands that do not apply to a particular list. The commands *purge*, *unhold*, *help*, *info*, *which* are available in this way.

For example, sending mail to [purge@example.com](mailto:purge@example.com) will unsubscribe you from any mailing lists you are on at the ListManager server running at example.com.

If you do not want ListManager to respond to this address, enter it in [Utilities: Administration: Server: Server Settings: Basic Settings: Remove Command Email Addresses](#).

This is a list of all of the command email addresses for which ListManager will accept mail. Replace "listname" with the actual name of the list. If you do not want ListManager to respond to a particular address, enter it in [Utilities: Administration: Server: Server Settings: Basic Settings: Remove Command Email Addresses](#). Note that if you have rebranded ListManager, ListManager will also respond to the [rebrandname](#) you have specified.

ack-listname	listserv	repro-listname
admin	listserve	request-listname
confirm-listname	listserver	review-listname
digest-listname	lyris	signoff-listname
error	lyris-admin	signon-listname
goodbye-listname	lyris-confirm	stats-listname
hello-listname	lyris-confirmation	sub-listname
help	lyris-error	subscibe-listname
index	mail-listname	subscribe-listname
info	majordomo	suscribe-listname
join-listname	mime-listname	textdigest-listname
leave-listname	mimedigest-listname	unhold-listname
list	noack-listname	unscibe-listname
listmanager-admin	nomail-listname	unscribe-listname
listmanager-confirm	noreply	unsibsribe-listname
listmanager-confirmation	norepro-listname	unsub-listname
listmanager-error	off-listname	unsubscribe-listname
listmanagersql	on-listname	unsubscribe-listname
listmanagersql-admin	owner-listname	unsubscribe-confirm-listname
listmanagersql-confirm	postmaster	unsubscribe-listname

listmanagersql-confirmation	procmal	unsubscribe-listname
listmanagersql-error	purge	unsuvscribe-listname
listproc	query	unsuvscribed-listname
lists	remove-listname	which

## ***The Command-Listname Address***

---

Email Address: Command-Listname@ and Listname-Command@

Purpose: This is an alternate address for sending ListManager commands, and for most commands, is the simplest way to execute them. For commands that relate to a mailing list, sending any mail to the Command-Listname@ address executes that command. The text of the message sent is not relevant in the command.

For example, to subscribe to a mailing list called "jazztalk", people can send mail to "jazztalk-subscribe" ("subscribe-jazztalk" also works) Listname-Command@... and Command-Listname@ are equivalent. Both will work, and both mean the same thing.

The commands *subscribe* (and aliases), *unsubscribe* (and aliases), *purge*, *mail*, *digest*, *mimedigest*, *index*, *nomail*, *ack*, *noack*, *unhold*, *query*, *confirm*, *review*, *stats*, *hello*, *goodbye* are available in this way.

# Message Personalization and Scripting

## Message Personalization and Scripting

---

### Introduction

With ListManager, you can easily create unique, one-to-one emails tailored to the exact needs and interests of your recipients, without having to create more than one message.

The easiest way to personalize your message is to use the [Insert Field](#), [Insert Condition](#), and [Insert URL](#) wizards when creating content. This section discusses how to manually insert these tags if you don't want to use the wizards, or if you'd like to do more advanced personalization and scripting.

There are four major categories of message personalization: Mail Merge, Clickthrough Tracking, Conditional Content, and Advanced Scripting.

**Mail Merge Tags** let you insert directly into your email messages information from your database, or from procedures ListManager performs. The classic example of this is to write "Dear Bob" in Bob's email, "Dear Mary" in Mary's, and so on.

**Clickthrough Tracking, Opens and HTML Detection** let you include tags that allow you to track the success of your mailing. They allow you to track clickthroughs, detect whether someone has opened your message, or whether or not a recipient has HTML capability.

**Conditional Content Commands** allow you to insert blocks of text into your message depending on whether certain conditions are true for a particular recipient. As a simple example, suppose you know that Bob has a dog, but Mary does not. You can tell ListManager to add a special paragraph promoting dog biscuits into all messages going to customers who have dogs. Bob would get this special paragraph in his email, while Mary would not.

**Invite (Referral Feature)** allows your members to invite their friends to join the list. List members click on a link, which takes them to a referral form. They fill in the names and email addresses of their friends, who receive an invitation to join the list

**Advanced Scripting** allows you to insert complex, highly dynamic content in your message. In ListManager, message personalization take advantage of a highly flexible programming language called Tcl. You don't have to be a great programmer to create and use custom scripts! This manual will show you a variety of easy templates for you to follow to create Tcl scripts. People with programming experience will also find that Tcl is a very powerful tool for extending the functionality of their messages.

### How Do I Use ListManager's Personalization?

All mail merge tags, conditional content commands, and advanced scripts must begin and end with double percent signs (%%). Upon sending, ListManager will automatically replace the script with its appropriate result in the outgoing message.

For example:

```
%%merge members_.FullName%%
```

will be replaced by ListManager with the full name of the message recipient, or a blank if no name is in the database table.

If you want double percent signs (%%) to appear in the actual outgoing message for some reason, you can place a "\" before the "%%". The "\" will prevent the delimited script that immediately follows from being executed and replaced.

Note that your %%-delimited scripts will only work if you enable scripting in your list settings. If scripting is not enabled, then the script text will appear without being replaced.

## Mail Merge

### Using Mail Merge Tags

---

#### What are Mail Merge Tags?

Mail merge tags allow you to insert information from your database directly into your email messages. You can use mail merge tags to personalize your messages for each user. Basic examples include (with personalized text in bold):

Dear **Joe**:

Wouldn't your **dog Rex** like to...?

We see that you have an account balance of **\$34.05**.

The easiest way to personalize your message is to use the [Insert Field](#) wizard when creating content. This section discusses how to manually insert these tags if you don't want to use the wizards, or if you'd like to do more advanced personalization and scripting.

#### What are some of the merge tags I can use right now?

ListManager includes a large number of short and long tags with the product that you can use immediately. To learn more, see the section [Mail Merge Short Tags](#).

#### How can I have ListManager generate these tags for me automatically?

If you create content, you can use the [Insert Field](#) feature to automatically merge in mail merge tags for you.

#### How do I manually create a Mail Merge Tag?

ListManager supports two different types of mail merge tags: short tags, and long tags.

**Short tags** are created automatically by ListManager for all fields in your members data table. The short tag syntax is simple:

```
%%fieldname%%
```

where *fieldname* refers to a field in your member table. Short tags are case sensitive, and only work for fields in your members table. If there's no information available, it will be left blank.

For example, to merge in a member's full name using the short tag, you would put the following in your message:

```
Dear %%FullName_%%
```

When Thomas Middleton receives the message, he'll see:

```
Dear Thomas Middleton,
```

Because merging from the members table is so common, ListManager lets you merge in information from this table using this simpler short tag format. Short tags are limited to your members table; to merge in other information, use long tags. See [Mail Merge Short Tags](#) for a list of tags.

**Long tags** let you insert fields from any database table to which ListManager has access. The long tag syntax is:

```
%%merge tablename.fieldname%%
```

where *fieldname* refers to a field (or column) in the database table *tablename*. Note that, like short tags, regular tags are case sensitive.

To merge in a recipient's full name using a long tag, you would include the following in your message:

```
Dear %%merge members_.FullName_%%
```

In this case, we chose a field from the members\_ table to merge into our message. Any field from the members\_ table can be inserted in this manner.

You can also merge data from other tables as well if you send your message to a subset which includes a *join* to another table (ListManager Pro or Enterprise only). For example, suppose you created a subset which joined to a table called *demographics* which had a field called *phonenum*. You could insert this data into your message by using the following mail merge tag:

```
Our records show we can contact you at %%merge demographics.phonenumber%%
```

Generally, data from the lists\_, topics\_, sites\_, inmail\_ and outmail\_ tables are already associated with the message, so you can merge in information from these tables without creating a subset with a *join* to these tables. If you sent your message to a subset, you can also merge data from the subsets\_ table.

### How do I use the Mail Merge Tags?

To use mail merge tags, simply insert the tag where you want the text to be placed. ListManager will automatically replace the tag with the appropriate data.

Let's say you have a field in your member table called *FirstName*. Because the field is in your member table, ListManager automatically created a short tag for it, in the format `%%FirstName%%`. To use it, here is what you would write:

```
Dear %%FullName%%,
```

```
Let me tell you about this great opportunity...
```

When you send the message, ListManager will remove the tag and replace it with the value stored in the *FullName\_* field. Bob Jones, for example, would receive an email beginning this way:

```
Dear Bob Jones,
```

```
Let me tell you about this great opportunity...
```

And Mary Wong would see:

```
Dear Mary Wong,
```

```
Let me tell you about this great opportunity...
```

Long tags work exactly the same. Let's say you're writing to a group of pet owners. Bob has a dog named Fluffy, and you store information about Bob's dog in your *pets* database table. The *petstable* includes two fields, *PetType* and *PetName*. Since these fields are not part of the *Member\_* table, you must send to a subset which joins your *pets* table, and then specify them using the long tags. Simply type:

```
Dear %%FullName%%,
```

```
Wouldn't your %%merge pets.PetType%% %%merge pets.PetName%% love a new, warm blanket during these winter months?
```

As with the short tags, ListManager will replace the tag with the information stored in your tables. Bob, for example, would see:

```
Dear Bob Jones,
```

```
Wouldn't your dog Rex love a new, warm blanket during these winter months?
```

And Mary, who owns a cat, would see:

```
Dear Mary Wong,
```

```
Wouldn't your cat Snookums love a new, warm blanket during these winter months?
```

### Where can I use the tags?

You can use most tags in all parts of your message including the body, subject, header, footer, to: fields, and from: fields. The merge tags can also be used in documents (hello, goodbye, etc.).

Some tags such as `%%merge whatlists%%` return a list of values, which would not be displayed properly in one line fields (e.g., the Subject).

### What if a field is blank?

If a field is blank, the merge tag will simply be removed and be replaced by nothing in most cases. If this is a problem, you should consider using a Conditional Content Command, which can easily provide a default value in case a field is empty. (Note that some of the [Mail Merge Short Tags](#) also do this in a few simple cases.)

### What if I want recipients to see the word "%%anything%%" in my message?

To keep ListManager from replacing a piece of text that looks like a merge tag, just place a backslash ("\") in front of the script delimiters (the double %% sign), like so:

```
Dear %%firstname%%,  
  
Using merge tags in the To: field is easy! Just type  
\%%EmailAddr_\%% right into the To: field...
```

ListManager will remove the backslash automatically. If you sent this message to Bob, he would see:

```
Dear Bob,  
  
Using merge tags in the To: field is easy! Just type  
%%EmailAddr_%% right into the To: field...
```

Note that you'll need to use the backslash any time you use a double percent sign.

### Advanced Scripting and Mail Merge Tags

The Mail Merge tags described here aren't the only way of inserting custom content into your message. Conditional Content Commands allow you to insert content into your message depending on whether certain conditions are true for a particular recipient.

You can also take advantage of more powerful features using [Advanced Scripting](#). Advanced Scripting expands upon the basic Mail Merge functionality, allowing you to leverage the power of the language Tcl to create highly customized messages.

In addition to the *merge* command outlined above, there are other procedures for inserting special content into your message. *Merge* and other procedures are fully documented in the [ListManager Tcl Procedures](#) section.

If you are using mail merge tags in your own custom Tcl script, It is important to note that the shortcut method of mail merge is a special case and is not valid Tcl. This means that you can't use just the field name anywhere else in a Tcl script other than as the argument to a procedure.

### Obsolete Mail Merge Codes

ListManager versions 4.2 and lower used different tags to perform mail merge. E.g.: `$subst('email.unsub')`. These tags were replaced with the current codes in versions 5.0 and higher. Generally, these legacy codes may be translated by replacing `$subst('` with `%%merge` and the final `)` with `%%`. For example, `$subst('email.unsub')` is now `%%merge email.unsub%%`. Many legacy tags were made "short tags" that do not require the word "merge" to work, so `%%email.unsub%%` also works.

Although many of these legacy merge codes may work in later versions, not all will. Users upgrading from earlier versions should edit automated messages, headers and footers to use the updated tags.

## Mail Merge Commands

### Mail Merge Short Tags

---

The mail merge shortcut tags either pull data from your members database table, or perform procedures to provide the needed information. If you have additional columns in your members database table, you can merge their value in using this simple %%fieldname%% syntax. Note that if you have List Scripting/Merge Capabilities set to No Advanced Scripting, or if you're not running ListManager Pro or Enterprise, only the default ListManager short tags are available.

The easiest way to personalize your message is to use the [Insert Field](#) wizard when creating content. This section discusses how to manually insert these tags if you don't want to use the wizards, or if you'd like to do more advanced personalization and scripting.

#### Commonly Used Short Tags

##### **%%emailaddr%%**

The recipient's email address. Note that this tag works correctly even if the email address field in the database has a different name. This tag is equivalent to %%merge members\_.EmailAddr\_%%

##### **%%email.owner%%**

The email address for sending messages to the owner(s) of this mailing list. This is the owner-listname@... address and all mail sent to this address is distributed to the members of the list who have the setting "receive admin mail: yes" set.

##### **%%email.unsub%%**

The merge tag %%email.unsub%% will be inserted into your content, and will be converted into a unique unsubscribe mail merge tag for each recipient. Example:

```
leave-141-4323.b5b1d9ada94bb80609d21eecf7a2ce7a@example.com
```

Only member 4323 will see this address. When email comes into ListManager with this address, it will unsubscribe that member, and record which mailing prompted the member to unsubscribe. The string "b5b1d9ada94bb80609d21eecf7a2ce7a" dot-appended to the address is a checksum, ensuring that malicious people cannot unsubscribe others. For example, if someone changes the number to something else, say "4000," by mailing to "leave-141-4000.b5b1d9ada94bb80609d21eecf7a2ce7a@example.com," ListManager will see that this number has been tampered with, because "b5b1d9ada94bb80609d21eecf7a2ce7a" is not the correct checksum for the string "leave-141-4323". In this case, ListManager will interpret the message as if



it were sent to "leave-jazztalk@example.com" and unsubscribe the sender of the message.

**%%email.purge%%**

The email address for unsubscribing from all mailing lists at this server.

**%%expiredate\_%%**

The date (if any) that this recipient's subscription expires. This tag is equivalent to %%merge members\_.ExpireDate\_%%

**%%firstname%%**

The recipient's first name (the first part of their full name). If the member does not have a full name, their email address is used instead. If a member only has a single component to their name, that part is used.

**Note** You can supply an alternate name which will be inserted in the message if there is no first name for the recipient. To do so, insert a space after the "firstname" text, and then type the alternate name. For example:

**Dear %%firstname Member%%,**

In this case, if the recipient does not have a first name, his email will read:

**Dear Member,**

**%%fullname%%**

The recipient's full name. If the member does not have a full name, their email address is used instead. For example, you might start your mailing out with this:

```
Dear %%fullname%%, we are glad that you have...
```

And ListManager would substitute it to say:

```
Dear Bob Smith, we are glad that you have...
```

**%%fullname\_%%**

Similar to %%fullname%%, except if there is no name, a blank is inserted. This tag is equivalent to %%merge members\_.FullName\_%%

**%%nameemail%%**

The full name and email address of the recipient.

```
For example, you might want each posting to your list to be addressed to the individual recipient:  
To: %%nameemail%%
```

If a full name is not available, ListManager will only put the email address.

```
For example:  
Bob Smith <bob@example.com>
```

Or if no name is available:

**%%url.mailing%%**

Merges in a link that, when clicked, displays the mailing with all fields merged for the recipient in the recipient's web browser. Recipients may click this URL to view the message correctly if it is not viewable in the email client. This code requires that [archiving](#) be enabled for your list.

**%%url.resetpassword%%**

Sends the recipient a link that, when clicked, allows the admin password to be replaced. The URL is valid for one hour after it is sent.

**%%url.resetpassword\_mri%%**

Sends the recipient a link that, when clicked, allows the password to the discussion forum interface to be replaced. The URL is valid for one hour after it is sent.

**%%whatlists%%**

This substitutes in a listing of all the lists on the server the recipient is a member of. This tag is very useful when you want to let users know exactly which lists they have signed up for. It is important to note that this tag only shows those lists where the member's status is "normal". In other words, if a list the member has subscribed to is set to require confirmation, and the member has not confirmed, the list will not show up in this listing. An excellent opportunity to use this tag is when a member signs up for many lists at once and they are sent a single hello document. That way, rather than receiving a welcome message for each list, they receive a single welcome with a listing of the lists they've joined.

Note that this tag should not be used in the Subject: line of a message or document, as it will force some of the email headers into the body of the message.

**%%whatlistsunconfirmed%%**

This substitutes a listing of all the lists the recipient has subscribed to, but has not yet confirmed. This tag is particularly useful when adding a member to many lists and you want to send them a single confirmation that shows the lists they have not yet confirmed. A good opportunity to use this tag is when you have subscribed someone to many lists at once using the 'Add' command in a command email message. In that command message, you also specified that the member should receive a single confirmation message by using the `oneconfirm` modifier. See [Adding to Many Lists](#) for more information.

Note that this tag should not be used in the Subject: line of a message or document, as it will force some of the email headers into the body of the message.

## Other Short Tags

These tags are also available, though less commonly used. You may also create tags from any of the `members_` fields. A list of the default ListManager member table fields may be found in the [members](#) section of the Programmer's guide.

**%%author.nameemail%%**

The full name and email address of the message sender, e.g.: Bob Smith <bob@example.com>. Or, if no name is available, only the email address is merged in: bob@example.com.

**%%brand.commandaddress%%**

Changes the email address that a message is sent from to appear to be "listmanager@yourservername.com". For example, "ABC@example.com" would appear as "listmanager@example.com". This is useful for sending commands directly to ListManager or to other list administrators.

**%%ConfirmDat\_%%**

The date (if any) when this recipient confirmed their membership. Only applies to lists where "confirm membership: yes" is set. This tag is equivalent to %%merge members\_.ConfirmDat\_%%

**%%DateJoined\_%%**

The date when this recipient joined the list. This tag is equivalent to %%merge members\_.DateJoined\_%%

**%%email.list%%**

The email address to use when writing to this list.

**%%email.listsegment%%**

The email address to use when writing to this list/segment.

**%%inmail.bodyquoted%%**

The full body of the incoming mail message (does not include the header), with each line quoted with a "> " character.

**%%list.name%%**

The short name of the list.

**%%list.segment%%**

The list and segment name. E.g., "listname.administrators".

**%%memberid%%**

The recipient's member ID. Note that this tag works correctly even if the member ID field in the database has a different name. This tag is equivalent to %%merge members\_.MemberID\_%%

**%%memberidchar%%**

The recipient's member ID along with a special checksum character. This is used in many places for creating "failsafe" confirm, unsubscribe, and purge addresses and is also used by some special web-based scripts.

**%%outmail.messageid%%**

The message ID of this message in the outmail queue.

**%%poundemail%%**

The recipient's email address with a "#" sign substituted for the "@" symbol. This tag is used in message headers for identification purposes and is not really useful for anything else.

**%%recip.hdrto%%**

Returns the current recipient's email address and full name in the standard header format of:

"Full Name" <emailaddress@example.com>

or, if the full name field is empty, just the email address will be returned. This merge tag is generally used on the To: field of a message.

**%%recip.smtpmessageid%%**

Returns a unique ID for this mailing and recipient for use in the Message-ID header field. Since this is added automatically by ListManager, you will generally not ever need this tag.

**%%list.hdrfrom%%**

Returns the name of the list and the list email address:

"Listname" <listname@example.com>.

**%%listmanager.hdrfrom%%**

Returns the string:

"Lyris ListManager" <listmanager@example.com>

The product name and command address depend on the server's rebrandable settings and the domain of the site that the current mailing is being sent to.

**%%listmanager.hdrfromadmin%%**

This tag is obsolete, instead use **%%listmanager.hdrfromnoreply%%**, described here:

**%%listmanager.hdrfromnoreply%%**

Returns the string:

"Lyris ListManager" <lyris-admin@example.com>

The product name and command address depend on the server's rebrandable settings and the domain of the site that the current mailing is being sent to.

**%%listmanager.mailfrom%%**

This tag is obsolete, instead use **%%brand.commandaddress%%** instead, described here:

**%%listsegment.hdrfrom%%**

Returns the name of the list and the segment email address:

"Listname" <listname.segment@example.com>.

**%%brand.commandaddress%%**

Returns the command address for the server. For example:

"listmanager@example.com".

**%%brand.name%%**

Returns the current brand name. For non-rebrandable servers, this will always be "Lyris ListManager".

**%%brand.emailname%%**

Returns the name part of the ListManager command address. For non-rebrandable servers, this will always be "lyris".

**%%brand.emailnamelc%%**

Returns the lower case name part of the ListManager command address. For non-rebrandable servers, this will always be "lyris".

**%%brand.commandaddress%%**

Returns the full command address including the domain.

**%%segment.name%%**

Returns the name of the segment sent to. For example, "administrators".

**%%site.domainname%%**

Returns the domain name associated with the site that the outmail record is associated with. If there is no site, this will default to the alphabetically sorted first domain in the sites\_ table.

**%%outmail.messageid%%**

Returns the message ID of the current outmail record.

**%%author.nameemail%%**

Returns the name and email address of the sender of the current mailing in the form:

Full Name <email@example.com>

Note that this information is not available for mailings sent via the web interface.

**%%email.join%%**

Returns the email address for joining the current list.

**%%email.confirm%%**

Returns the email address for confirming a subscription to the current list.

**%%email.bounce%%**

Returns the bounce address for the current recipient.

In some cases, these tags provide substitute data if the originally requested data is blank, much like a [conditional content command](#). For example, if there is no name, %%firstname%% will merge in the email address. For more information, see [Using Mail Merge Tags](#).

If you are using your own members table instead of the default ListManager members\_ table, you'll need to use the field names in your members table. See [Using Mail Merge Tags](#) for more information.

### **If the name is blank, I'd like to merge in something else**

Tags like %%fullname%% will merge in the member's email address if there is no name. If you'd like to merge in something else, you may use a script like this:

```
%%!  
set fullname [merge members .fullname ]  
if {$fullname == ""} {  
  return "no name"  
} else {  
  return $fullname  
}%%
```

## **Scripting Information**

If you are using mail merge tags in your own scripts, use the full %%merge members\_.fieldname%% syntax for members table field names. The short tags above which are not member table fieldnames may be used in scripts.

## Recipient Fields

---

### **%%merge recip.nameemail%%**

The full name and email address of the recipient. For example, you might want each posting to your list to have a header which identifies the original author, as in:

From: %%merge recip.nameemail%%

If a full name is not available, ListManager will only put the email address.

For example:

Bob Smith <bob@example.com>

Or if no name is available:

bob@example.com

**%%merge recip.emailaddr%%** This substitutes in the recipient's email address.

For example, you might make your list header be:

To: %%merge recip.EmailAddr%%

You may be interested to know....

And ListManager would substitute it to say:

To: bob.smith@example.com

You may be interested to know....

**%%merge recip.fullname%%** This substitutes in the recipients' full name, as recorded in the members\_.fullname\_ field. If the member does not have a full name, their email address is used instead.

For example, you might start your mailing out with this:

Dear %%merge recip.FullName%%, we are glad that you have...

And ListManager would substitute it to say:

Dear Bob Smith, we are glad that you have...

**%%merge recip.firstname%%** This substitutes in the recipients' first name (the first component of their full name). If the member does not have a full name, their email address is used instead. If a member only has a single component to their name, that component is used.

For example, you might start your mailing out with this:

Dear %%merge recip.FirstName%%, we are glad that you have...

And ListManager would substitute it to say:  
Dear Bob, we are glad that you have...

**%%merge recip.memberid%%** This substitutes in the recipients' unique Member ID. This is useful for exactly identifying the user.

**%%merge recip.list%%** The name of the mailing list this recipient is receiving this message from.

**%%merge recip.receiveack%%** Whether or not this recipient receives acknowledgements of their postings.

**%%merge recip.subtype%%** The type of subscription this recipient has (mail, digest, etc).

**%%merge recip.expiredate%%** The date (if any) that this recipient's subscription expires.

**%%merge recip.whatlists%%**

This substitutes in a listing of all the lists the recipient is a member of. This is very useful when you want to let users know exactly which lists they have signed up for. It is important to note that this tag only shows those lists where the member's status is "normal". In other words, if a list the member has subscribed to is set to require confirmation, and the member has not confirmed, the list will not show up in this listing.

For example, you may want to use this merge tag in the confirmation document:

Welcome! You have signed up for the following lists:

%%merge recip.whatlists%%

By replying to this message, you confirm...

An excellent opportunity for the above example is when a member signs up for many lists at once and they are sent a single confirmation document. That way, rather than receiving a confirmation for each list, they receive a single confirmation with a listing of the lists.

**%%merge recip.whatlistsunconfirmed%%**

This substitutes a listing of all the lists the recipient has subscribed to, but has not yet sent confirmation for. This is particularly useful when adding a member to many lists and you want to send them a single confirmation that shows the lists they have not yet confirmed on.

For example, you may want to use this merge tag in the confirmation document:

Welcome! Your confirmation is needed for the following lists:

%%merge recip.whatlistsunconfirmed%%

By replying to this message, you will confirm yourself for all of these lists...

A good opportunity to use this tag is when you have subscribed someone to many lists at once using the 'Add' command in a command message. In that command message, you also specified that the member should receive a single confirmation message by using the *oneconfirm* modifier.

**%%merge purgeid%%** This substitutes in the Recipient's email address, in square brackets. If this text is forwarded to the unsubscribe-listname@... or purge@... address, ListManager will automatically locate it and unsubscribe this address. This

allows you to provide a failsafe unsubscribe mechanism. For example, a typical list footer might be:

This is a posting from: %%merge List.Name%%

To unsubscribe, send a message to %%merge Email.UnSub%%  
%%merge PurgeID%%

**%%merge outmail.messageid%%** This substitutes in the message's unique outmail message ID. This is useful for exactly identifying the message.

For example, if you sent the following message to a mailing list:

Hello! Your email address is %%merge recip.EmailAddr%%, your member ID is %%merge recip.MemberID%% and the ID of this message is %%merge Outmail.MessageID%%.

To the person who received the message, it might look like this:

Hello! Your email address is bob@example.com, your member ID is 905 and the ID of this message is 3154.

**%%merge recip.datejoined%%** The date that this recipient joined this mailing list.

**%%merge recip.numbounces%%** The number of permanent failures this recipient has produced in recent days.

**%%merge recip.datebounce%%** The date of the most recent permanent failure received from this recipient.

**%%merge recip.islistadm%%** Whether or not this recipient is a list administrator.

**%%merge recip.confirmdat%%** The date (if any) that this recipient confirmed their membership. Only applies to lists where "confirm membership: yes" is set.

**%%merge recip.notifyerr%%** Whether or not this recipient receives error mail notifications (i.e., failure reports).

**%%merge recip.dateheld%%** If this recipient is held, what date they were held on.

**%%merge recip.norepro%%** Whether or not this recipient receives copies of their own postings.

**%%merge recip.cleanauto%%** Whether or not this recipient will be automatically held if they bounce too much mail (too many permanent failures).

**%%merge recip.comment%%** The comments that this recipient has.

**%%merge recip.additional%%** The additional information this recipient has. This field is not used by ListManager, and is meant for user-defined data of any type.

**%%merge recip.userid%%** The userid information this recipient has. This field is not used by ListManager, and is meant for user-defined data of any type.



# Author Fields

---

Member fields merge in information about the sending member (i.e., the author of the message). To merge information about the recipient, use recipient fields.

**%%merge member.nameemail%%**

The full name and email address of the sending member. For example, you might want each posting to your list to have a header which identifies the original author, as in:

From: %%merge member.nameemail%%

If a full name is not available, ListManager will only put the email address.

For example:

Bob Smith <bob@example.com>

Or if no name is available:

bob@example.com

**%%merge member.emailaddr%%** The email address of this member.

**%%merge member.fullname%%**

The full name of this member. For example, you might want each posting to your list to have a header which identifies the original author, as in:

This message was written by %%merge member.fullname%%

**%%merge member.memberid%%** The ID of this member, example: "3456"

**%%merge member.list%%** The name of the mailing list this member belongs to.

**%%merge member.receiveack%%** Whether or not this member receives acknowledgements of their postings.

**%%merge member.subtype%%** The type of subscription this member has.

**%%merge member.expiredate%%** The date (if any) that this member's subscription expires.

**%%merge member.datejoined%%** The date that this member joined this mailing list.

**%%merge member.numbounces%%** The number of permanent failures this member has produced in recent days.

**%%merge member.datebounce%%** The date of the most recent permanent failure received from this member.

**%%merge member.islistadm%%** Whether or not this member is a list administrator.

**%%merge member.confirmdat%%** The date (if any) that this member confirmed their membership. Only applies to lists where "confirm membership: yes" is set.

**%%merge member.notifyerr%%** Whether or not this member receives error mail notifications (i.e., failure reports).

**%%merge member.dateheld%%** If this member is held, what date they were held on.

**%%merge member.webenv%%** If this member subscribed using the web interface, the environment variables (such as browser type, TCP/IP address, referrer, etc.) that were active at that time.

**%%merge member.norepro%%** Whether or not this member receives copies of their own postings.

**%%merge member.cleanauto%%** Whether or not this member will be automatically held if they bounce too much mail (create too many permanent failures).

**%%merge member.comment%%** The comments that this member has.

**%%merge member.additional%%** The additional information this member has. This field is not used by ListManager and is meant for user-defined data of any type.

**%%merge member.userid%%** The userid information this member has. This field is not used by ListManager and is meant for user-defined data of any type.

## List Fields

---

The following fields merge information from the list the message is being sent through.

**%%merge list.name%%** The short name of the list.

**%%merge list.topic%%** The name of the topic this list belongs to.

**%%merge list.descshort%%** The short description of this mailing list.

**%%merge list.admin%%** The name of the administrator assigned to this mailing list.

**%%merge list.urllist%%** The URL to the homepage of this mailing list (if any is defined).

**%%merge list.urllogo%%** The URL to the GIF/JPEG graphic logo for this mailing list.

**%%merge list.keywords%%** The topical keywords assigned to this mailing list.

## Site Fields

---

**%%merge site.name%%** The short name of this site.

**%%merge site.domainname%%** The host name this site uses, example: "newsletters.example.com"

**%%merge site.country%%** The country this site is located in.

**%%merge site.city%%** The city this site is located in.

**%%merge site.urlowner%%** A URL to the homepage of this site's owner.

**%%merge site.ownergif%%** A URL to a GIF/JPEG graphic logo for this site owner.

**%%merge site.urllyris%%** A URL to the homepage for this site (if any).

**%%merge site.mailaddr%%** The postal mailing address of this site.

**%%merge site.desc%%** A short description of this site.

**%%merge site.mainadmin%%** The name of the main administrator defined for this site.

**%%merge site.techsupp%%** The name of the technical support contact defined for this site.

## Email Address Fields

---

**%%merge email.list%%** The email address for posting to this mailing list. Messages emailed to this address will be contributed to the mailing list.

**%%merge email.owner%%** The email address for sending messages to the owner(s) of this mailing list. This is the owner-listname@... address and all mail sent to this address is distributed to the members of the list who have the setting "receive admin mail: yes" set.

**%%merge email.unsub%%** The email address for unsubscribing from this mailing list. This is the "unsubscribe-listname-XXXXZ@..." address. The simplest way to unsubscribe from a mailing list is to send a message to this address.

**%%merge email.purge%%** The email address for unsubscribing from all mailing lists at this server. This is the "purge@..." address. The simplest way to unsubscribe from all mailing lists is to forward a list posting to this address.

## Incoming Mail fields

---

**%%merge inmail.messageid%%** The ListManager message-ID of the message being posted.

**%%merge inmail.hdrfromspc%%** The value of the "From " field in this message. This is the value passed via the MAIL FROM:<> command during the SMTP transaction.

**%%merge inmail.hdrfrom%%** The value of the "From:" header in this message.

**%%merge inmail.hdrto%%** The value of the "To:" header in this message.

**%%merge inmail.hdrdate%%** The value of the "Date:" header in this message.

**%%merge inmail.hdrsubject%%** The value of the "Subject:" header in this message.

**%%merge inmail.hdrall%%** The complete header in this message.

**%%merge inmail.to%%** The actual recipient of this message. This is the value passed via the RCPT TO:<> command during the SMTP transaction.

**%%merge inmail.byemail%%** Whether or not this incoming message was received by email (or by NNTP). If the message was received through the web interface, this value will be "no", otherwise it will be "yes".

**%%merge inmail.body%%** The full body of the incoming mail message (does not include the header)

**%%merge inmail.bodyquoted%%** The full body of the incoming mail message (does not include the header), with each line quoted with a ">" character.

## How do I convert dates into a useful format?

---

Sometimes, you will want to change the format of a date into a more human-readable format, instead of using the default format. You can do this using the "timeformat" mail merge tag. The syntax is:

```
%%timeformat tablename.datefield "formatstring"%%
```

*datefield* refers to any date field in the table *tablename*. *Formatstring* refers to a sequence of codes which tell ListManager how to display the date. A list of these codes is below.

If the "formatstring" argument is not specified, the format string "%a %b %d %H:%M:%S %Z %Y" is used (e.g.: "Fri Mar 01 15:40:00 PDT 2002").

### Format Codes

Field descriptors consist of a % followed by a field descriptor character. All other characters are copied into the result. Valid field descriptors are:

%%  
Insert a %.

%a  
Abbreviated weekday name (Mon, Tue, etc.).

%A  
Full weekday name (Monday, Tuesday, etc.).

%b  
Abbreviated month name (Jan, Feb, etc.).

%B  
Full month name.

**%c**  
Locale specific date and time.

**%d**  
Day of month (01 - 31).

**%H**  
Hour in 24-hour format (00 - 23).

**%I**  
Hour in 12-hour format (00 - 12).

**%j**  
Day of year (001 - 366).

**%m**  
Month number (01 - 12).

**%M**  
Minute (00 - 59).

**%p**  
AM/PM indicator.

**%S**  
Seconds (00 - 59).

**%U**  
Week of year (00 - 52), Sunday is the first day of the week.

**%w**  
Weekday number (Sunday = 0).

**%W**  
Week of year (00 - 52), Monday is the first day of the week.

**%x**  
Locale specific date format.

**%X**  
Locale specific time format.

**%y**  
Year without century (00 - 99).

**%Y**  
Year with century (e.g. 1990)

**%Z**  
Time zone name.

### **The -gmt option to the clock command**

If the -gmt argument is present the next argument must be a boolean which if true specifies that the time will be recalculated as Greenwich Mean Time. If false then the

local time zone will be used as defined by the operating environment. If the `-gmt` option is not specified, then the local time zone time will be used.

## Examples

Suppose the value of the date field `DateJoined_` is Friday, March 1, 2002 at 3:40 P.M., and your server is in California.

```
%%timeformat members_.DateJoined_%%
```

would print: Fri Mar 01 15:40:00 PDT 2002

```
%%timeformat members_.DateJoined_ "%A, %B %d, %Y %I:%M %p"%%
```

would print: Friday, March 01, 2002 03:40 P.M.

```
%%timeformat members_.DateJoined_ "%a %d %b %Y %H:%M"%%
```

would print: Fri 01 Mar 2002 15:40

```
%%timeformat members_.DateJoined_ "%m/%d/%y %H:%M:%S"%%
```

would print: 03/01/02 15:40:00

```
%%timeformat members_.DateJoined_ "%m/%d"%%
```

would print: 03/01

```
%%return [clock format [clock seconds] -format "%A %b %d, %Y"]%%
```

would print the date when the particular message is sent, based on the system time.

Example:

Friday August 2, 2002

## Fetching Data from a Web Server

---

ListManager can retrieve data from a remote machine using the `httpget` mail merge tag. This data must be accessible via http.

**IMPORTANT NOTE:** Using `httpget` to fetch content for each recipient can significantly slow your ListManager sending speed. Each ListManager node can use `httpget` to fetch roughly 20,000 pages per hour. Fetching pages blocks other processes, so sending mail speeds will be significantly slower for concurrent mailings that are not using `httpget`.

If you are fetching a static page, it is strongly recommended that you use the `before;` `httpget` command (below) so ListManager fetches the page only once per mailing try.

If you need dynamic content where each possible page is static (such as ads), you should use the [before](#) command to fetch the data into Tcl variables and then programmatically choose between the different pages. Doing so will result in much higher sending speeds than fetching the page for each recipient.

## %%httpget%%

The syntax of the httpget command is:

```
%%httpget url (error mode (timeout (num retries (sleep interval (geturl_args)))))) %%
```

The parenthesized expressions are optional, but if you wish to use sleep\_interval, all the previous optional parameters (e.g., error\_mode, timeout, num\_retries) must be specified .

The URL argument can be virtually anything you can pull up with a web browser. The URL may point to a simple text file, some HTML code, or a CGI script.

To use httpget, you must be using ListManager Pro or Enterprise, and [Scripting Level](#) must be set to Full.

The arguments in parentheses are optional.

### error\_mode

If an error is returned by the httpget command, the error\_mode setting specifies what is returned. The options are:

- nothing** (default) - An empty string is returned.
- error** - Returns the status and error string.
- abort** - Aborts the mailing.
- skip** - Causes the current recipient to be skipped or, in message-level (before) tags, aborts the mailing.

### timeout

The HTTP request timeout, in milliseconds. The default is 5000 (5 seconds).

### num\_retries

The number of times ListManager will re-attempt to retrieve the URL. After the retries are exhausted, an error is handled based on the error\_mode. The default is 3 retries.

### sleep\_interval

The number of milliseconds to wait in between retry attempts. The default is 1000 (1 second).

### geturl\_args

A Tcl list of arguments passed to the http::geturl function after the URL. This parameter should rarely be needed.

## Example 1

You keep dozens of ads on your web server. You want them to be inserted into your newsletter using your script. The script's URL is http://yourserver/cgi-bin/ad.pl.

```
%%httpget "yourserver/cgi-bin/ad.pl"%%
```

Note that you don't need `http://` as part of the URL.

### Example 2

You have a script which creates a different page for each user, and would like these unique pages inserted for each email message sent.

```
%%httpget "localhost/cgi-bin/getdata.pl?id=[merge  
members_.emailaddr_]"%%
```

In the above example, ListManager first performs a substitution to merge in the member's email address, then retrieves the data at the resulting URL. Note that you must use square brackets and the full mail merge tag, not the short tag. Let's assume that `bob@example.com` is the member that ListManager is currently sending to. After substitution, the URL looks like:

```
http://localhost/cgi-bin/getdata.pl?id=bob@example.com
```

The nature of the script being called ("getdata.pl" in this case) is to generate some data unique to the member with that email address. This script can do whatever you design it to do, whether that means generating an ad or retrieving billing information.

Programmers have the ability to call a function in the middle of messages and insert whatever it returns right into the message at the point from which it was called.

While the `httpget` merge tag does not require any specific output from the URL, it is highly recommended that you include a standard 'HTTP/1.0 200 OK' status line, then a 'Content-Type: text/plain', or 'Content-Type: text/html' line followed by an empty line and the content of the text to be inserted. For example, a (Perl) script might have:

```
print "HTTP/1.0 200 OK\r\n";  
print "Content-Type: text/plain\r\n";  
print "\r\n";  
print "Hello! Please buy our products!";
```

### %%before; httpget%%

`Httpget` will repeatedly retrieve the data for each individual recipient. If, however, you only need to retrieve the data only once per mailing attempt, you can use the `before; httpget` tag instead. That is, before the mailing or retry begins, ListManager will pull the URL once, and fill in that same value for all recipients. Since the speed of `httpget` depends on the speed it can fetch data from your server, using `before ; httpget` can make your mailing speeds faster.

The syntax of the *before httpget* tag is:

```
%%before ; httpget "URL"%%
```

Note that the `httpget` will still be run again for each retry.

### Example

You keep dozens of ads on your web server. You want them to be inserted into your newsletter, with every recipient getting *the same* one. The script's URL is `http://www.lyris.com/getmailad.pl`.



```
%%before ; httpget "www.lyris.com/getmailad.pl"%%
```

For more information, see [Script Execution Points](#).

### %%after; httpget%%

As of ListManager 8.0, the %%after; httpget%% command has been deprecated.

### %%httpgetauth%%

The httpgetauth tag works the same as httpget, but there are two additional parameters that allow you to pass the user name and password as authentication headers to the server:

```
%%httpgetauth url user pass (error mode  
(timeout(num_retries(sleep_interval(geturl_args))))))%%
```

The parenthesized expressions are optional, but if you wish to use sleep\_interval, all the previous optional parameters must be specified.

geturl\_args: A Tcl list of arguments passed to the http::geturl function after the URL. This parameter should rarely be needed.

### error\_mode

If an error is returned by the httpget command, the error\_mode setting specifies what is returned. The options are:

- nothing** (default) - An empty string is returned.
- error** - Returns the status and error string.
- abort** - Aborts the mailing.
- skip** - Causes the current recipient to be skipped or, in message-level (before) tags, aborts the mailing.

### timeout

The HTTP request timeout, in milliseconds. The default is 5000 (5 seconds).

### num\_retries

The number of times ListManager will re-attempt to retrieve the URL. After the retries are exhausted, an error is handled based on the error\_mode. The default is 3 retries.

### sleep\_interval

The number of milliseconds to wait in between retry attempts. The default is 1000 (1 second).

## Changing Default httpget Settings

You may override the default httpget settings in a [list](#), [site](#) or [server](#) initialization script, or in a message level "init" string:

```
set default httpget error mode "nothing"  
set default httpget timeout 5000  
set default httpget num retries 3  
set default httpget sleep_interval 1000
```

# Troubleshooting Merge Tag Problems

---

## **My mail merge tags are blank.**

Mail merge tags are case sensitive on some platforms, so check to make sure you entered in the table and field name correctly. Also, if there is no data for that particular recipient, the result may be a blank.

## **I'm writing my mail merge tags correctly. Why don't they work?**

Unless you have a Pro or Enterprise license, you cannot use mail merge tags which reference any custom fields. If you have a Pro or Enterprise license, check your list and server settings to make sure that the Scripting Level is enabled. The server setting takes precedence over the list setting, so if scripting is not enabled at the server level, it will not be enabled for any list.

## **I have a standard license, and non-custom fields aren't being merged.**

If you are using a standard license, and you are having trouble with standard merge tags (such as %%emailaddr%%) in your message, you should also check your list and server settings. In Utilities: List Settings, set Scripting Level to Safe Scripting/Merge, and [Enable Scripting](#) to Administrators Only, even though these features say they are Pro or Enterprise features only. Changing these settings will enable you to use standard mail merge tags.

## **My URLs are breaking when I use mail merge.**

There are times when you need to send a string that is longer than the line-wrapping width of your email client. This is not a problem if you construct a message using the Send Message pages and disable word-wrap.

Spaces in the string are not a problem, since the wrapped line will be removed and the string will then be sent as it was composed. However, there are circumstances where a string might not have any spaces in it. In this case, it cannot be correctly "unwrapped". This will most often occur with URL's. To use a string that is longer than the wrapping width of your email client, you can construct it from shorter pieces. For example:

```
%%set mystring "http://www.somelongdomainname.com/cgi-  
bin/somescript.pl" ;  
append mystring "?someparameter=somevalue" ;  
append mystring "&someotherparameter=someothervalue" ;  
append mystring "&yetanotherparameter=yetanothervalue" ;  
return $mystring ;  
%%
```

## **If the name is blank, I'd like to merge in something else**

Tags like %%fullname%% will merge in the member's email address if there is no name. If you'd like to merge in something else, you may use a script like this:

```
%%!  
set fullname [merge members .fullname ]  
if {$fullname == ""} {  
  return "no name"  
} else {  
  return $fullname  
}%%
```

# Tracking

## Clickthrough Tracking, Opens, and HTML Detection

---

ListManager offers several ways for you to track the success of your mailing using clickthrough tracking URLs, open rate tracking and detect-HTML tags.

### Clickthrough Tracking URLs

The easiest way to include a clickthrough tracking URL is to create content, and use the Insert URL feature. See [Content: Insert URL](#) for more information.

If you would like to insert your URL manually, use the following format:

```
%%track [subst {http://acme.example.com/products/anvils.html}] -  
name {optionalname} -group {optionalgroup}%%
```

The -name and -group are optional, but may be helpful when viewing your tracking results in [Reports: Mailing Reports: Tracking Statistics](#).

If you are not using the HTML editor, the tracking URL may be formatted more simply:

```
%%track http://example.com%% -name "name" -group "group"%%
```

When sent, the tracking tag will be converted by ListManager into something that looks like this:

```
http://your.listmanager.server/t/51/3/1/2
```

When the recipient clicks on this tag, they will be redirected to the URL you specified when creating the clickthrough tracking URL. Information about clickthroughs can then be found in [Reports: Mailing Reports: Tracking Statistics](#).

### Tracking Without Cookies

Note that the [memberid], [memberidchar], [messageid], [urlid], [groupid], and [urltext] of a clickthrough can be identified without giving a user a cookie by inserting certain parameters into the URL. Curly brackets {} *must* be used around the tracked URL in order to accomplish this. The curly brackets {} must be added *after* the URL has been inserted into the document. Adding them before, in the URL dialogue window, will result in a nonclickable URL.

Adding the curly brackets {} causes the ID to be stored as part of the URL. If a Web site receives one of these ID's, it can keep track of it, and pass it to ListManager in [Action Tags](#), without the use of cookies. Use the following format:

```
%%track  
{http://your.destination.com?x=[memberid]&y=[messageid]}%%
```

The clickthrough logic will automatically replace the [memberid], [messageid], [urlid], [groupid], or [urltext] with the real ID in the destination URL, so the web server page can have these variables.

### Using HTML to Disguise a Tracking URL

A tracking URL contains the URL for your ListManager server. If you are sending text messages, this URL cannot be disguised. However, if you are sending an HTML message, you may disguise this URL using HTML.

For example:

```
<a href="%%track {http://www.lyris.com} -name {homepage} -group  
{top of page}%%">click here</A>
```

The tracking URL will be triggered when someone clicks on the words "click here".

An image may be made clickable as well:

```
<a href="%%track {http://www.lyris.com/read/some.htm} -name  
{yourname} -group {yourgroup}%%"></a></p>
```

This tracking URL will be triggered when someone clicks on the image.

### Tracking Rich Media

The syntax for tracking rich media is much like that for tracking URLs. For video:

```
%%track {http://www.lyris.com/read/b2b-route.mpg} -name  
{video}%%
```

For audio:

```
%%track {http://www.lyris.com/read/hibaby.wav} -name {audio}%%
```

### Detect Opens - Invisible GIF

Detecting opens of email messages can only be done in HTML or multipart-alternative messages with an HTML section. The easiest way to detect opens is to select Detect Opens in [Mailings: New Mailings: Tracking](#). Or, you may insert the following tag into your HTML message:

```
%%detect_open%%
```

Opens cannot be tracked for recipients who cannot see HTML; however, if a clickthrough is registered for a recipient for whom there has been no opens, an open is registered for that recipient.

### Detect HTML

Detecting HTML capability of recipients can only be done in HTML or multipart-alternative messages with an HTML section. The easiest way to detect HTML is to select Detect HTML Capability in [Mailings: New Mailings: Tracking](#). Or, you may insert the following tag into your HTML message:

```
%%detect_html%%
```

### Detect Both Opens and HTML

Detecting opens and HTML capability of recipients can only be done in HTML or multipart-alternative messages with an HTML section. The easiest way to detect opens and HTML capability is to select Detect Opens and Detect HTML Capability in [Mailings: New Mailings: Tracking](#). Or, you may insert the following tag into your HTML message:

```
%%detect_both%%
```

Note that when using multiple detect tags within the same email message, some tags may not work the way you expect them to. The `detect_both` tag essentially has the same functionality as the `detect_open` and `detect_html` tags put together. Therefore, to avoid mistakes where `detect_both` and one or both of `detect_open` and/or `detect_html` are used in the same message, ListManager keeps track of what is being tracked for a particular message and if a redundant tag is inserted, it is either ignored or, in the case of `detect_both`, modified such that you only get a single open and html tracking image in each message. The same applies to messages where `detect_html` or `detect_open` is used multiple times. The first one is kept, and the rest ignored.

### Detecting Opens and HTML Using CSS

ListManager usually detects opens with an invisible gif. Since gifs are blocked by some email clients, ListManager provides an alternative method using cascading style sheets.

To detect an open using a style sheet:

```
%%detect_open_css%%
```

To detect HTML using a style sheet:

```
%%detect_html_css%%
```

To detect both using a style sheet:

```
%%detect_both_css%%
```

Note that using both the gif and CSS methods of detecting opens will cause duplicate opens to be recorded.

## Clickthrough URLs and Disk Caching

---

When ListManager gets a clickthrough, it caches the destination URL on disk and in memory so that when future clickthroughs for the same URLs occur, it will not be necessary to look the URLs up in the database again. The most recently-used clickthrough URLs are stored in memory, and every URL that has been looked up before is backed up on disk. Disk storage requirements may vary, but 1k per cached URL is typical. If you have large numbers of distinct clickthrough URLs, you must ensure that you have sufficient disk space to cache them and monitor your disk space regularly.

The location of the URL cache is determined by the configuration parameter "urlcache\_directory" in tclhttpd.rc, which defaults to \$Config(home)/urlcache. If this is not a convenient location due to administration issues or available disk space, you can change this parameter to a more suitable value.

The disk cache will continue to grow as mailings with new URLs are created and more clickthroughs occur. The cache can be cleared at any time with no side effects. The system will periodically (every \$Config(urlcache\_monitor\_interval)) check for new URLs and add them to the disk cache as they are found. In addition, on system startup, the webserver automatically caches up to 10,000 of the most recently created URLs in anticipation of their use.

## Conditional Content Commands

### Conditional Content Commands

---

The Conditional Content Commands allow you to insert blocks of text or graphics into your message depending on whether certain conditions are true for a particular recipient. Using conditional content commands, you can easily create unique, one-to-one emails tailored to the exact needs and interests of your recipients, without having to write (or send) more than one message.

All the commands work using a simple *if-then-else* logic: *if* a particular condition is true, *then* insert a particular block of text; *else* (that is, if the condition is not true), insert a different text block. Note that by text, we mean both plain text or HTML -- you may include either.

These commands only work if you are using ListManager Pro or Enterprise, and if you have not disabled Scripting Level.

The easiest way to insert conditional content is to create content and [insert a condition](#).

### Basic information on the commands

---

Like the mail merge tags, all conditional content commands must begin and end with a double percent (%%) sign. Returns and spaces contained within the %% delimiters are not read, unless they are contained in the text blocks (that is, between the quotes: " ").

With the exception of the members table, fields are always referenced in the form *tablename.fieldname*, as in *members\_.FullName\_* or *address.zip*. If you are referencing a field in the members table, you may use just the field name. You may use [short tags](#) if they are members fields. Text values (listed as *value* in the examples to follow) are not case-sensitive.

ListManager uses quote marks (" ") as delimiters for text. When you place text between quotes, you preserve spacing, paragraph breaks, and internal quote marks. Moreover, text within quotes may contain mail merge tags, other conditional content commands, and scripts, permitting complex personalization.

Commands may be nested (that is, you can have one command inside another) by enclosing the command in [square brackets]. If you do NOT want merge tags and conditional content commands to be interpreted, place them inside {curly brackets}.

## Supported Commands

---

ListManager supports the following commands:

**iffield**- for single-condition if criteria (no AND or OR)

**ifcondition**- for simple multiple-condition if criteria (all AND or OR)

**ifboolean**- for complex multiple-condition if criteria (mixing AND and OR)

**ifrange**- for numerical if criteria

**ifdate**- for date-related if criteria

**showpercents**- to rotate blocks of text

While these commands cover the majority of conditional content needs, you may find you need more complex functions. If so, we recommend you visit our section on [Advanced Scripting](#).

## iffield

---

Use the "iffield" command in situations where you simply want to know whether a field is equal to a certain value or not.

The "iffield" syntax is:

```
%%  
iffield tablename.fieldname  
value1 "content1"  
value2 "content2"  
...  
valuex "contentx"  
"defaultcontent"  
%%
```

Here is what it's doing: for each individual recipient, the command looks in the table *tablename* for the field *fieldname*. If the field is equal to *value1*, then the command prints *content1* and ends the script. If the field is equal to *value2*, then the script prints *content2*, and so on. (You can have as many value/content pairs as you like -- but make sure each value has a content result.) If the field is not equal to any of the values, the script prints *defaultcontent*.

This command is perfect for simple true/false conditional content:

```
%% iffield tablename.fieldname value "contentif-true" "content-
if-false" %%
```

Since paragraphs don't matter outside the curly brackets, you can put everything on one line!

### Example 1

Say you sell pet supplies, and are having a special on dog bowls. You want to tell only dog owners about the special -- owners of any other pet should not see anything.

You already have a text field called *pet* in the *members\_* table. The field describes what type of pet the recipient has.

```
%%
iffield
members .pet dog
"We're having a special on dog bowls!"
" "
%%
```

Bob, who owns a dog, would see:

```
We're having a special on dog bowls!
```

Mary, who owns a cat, would not see anything, since the default text is blank (that is, there is nothing between the final set of quotes).

To save space, you can write the entire command on one line. If the *defaultcontent* is blank, you can even omit it. The following command would work just the same as the one above:

```
%% iffield members .pet dog "We're having a special on dog
bowls!" %%
```

### Example 2

Say you've opened two new stores in San Francisco and Denver. You want to tell all Californians about the San Francisco store, and all residents of Colorado about the Denver store. Since residents of other states won't be interested, you don't want to tell them about these specific stores.

You already have a field called *state* in the *members\_* table. This field contains two-letter designations for US states.

```
%%
iffield members .state
CA "Come see our new store in San Francisco!"
CO "Come see our new store in Boulder!"
"We're opening new stores all the time!"
%%
```

Bob, who lives in California, would see:

```
Come see our new store in San Francisco!
```

Joe, a resident of Colorado, would see:

```
Come see our new store in Denver!
```

Mary, a Connecticut resident, would see the default text:



```
We're opening new stores all the time!
```

**NOTE** When you paste examples into content or mailings while the HTML Editor is enabled, extra HTML tags are added. We recommend that you disable the HTML Editor before pasting example code.

## ifcondition [any/all]

---

### ifcondition all

Use the "ifcondition all" command when you want certain content to be inserted when **all** of a particular set of conditions are true (i.e., condition1 and condition2 and condition3...).

The "ifcondition all" syntax is:

```
%%  
ifcondition all  
tablename.fieldname1 value1  
tablename.fieldname2 value2  
...  
tablename.fieldnamex valuex  
"content-if-true"  
"content-if-false"  
%%
```

Here, for each individual recipient, the command evaluates whether every field is equal to the listed value. The first condition, for example, looks in table *tablename1* for the field *fieldname1*. If the value in that field is equal to *value1*, then the command concludes that condition is true. There is no limit on the number of conditions you can have.

If all the listed conditions are true, the command prints *content-if-true*. If even one of the conditions is not true, the command prints *content-if-false*.

### Example 1 (ifcondition all)

You want to tell people in Springfield, Illinois, about your new store there. Since there are many Springfields across the US, you need to specify which one using the *state* field. You store information on city and state of residence in the *members\_* table.

```
%%  
ifcondition all  
members .city springfield  
members .state IL  
"Come see our new Springfield store!"  
"We're opening new stores all the time!"  
%%
```

Residents of Springfield, Illinois, will see:

```
Come see our new Springfield store!
```

Residents of Springfield, Oregon, or Chicago, Illinois, or any other place, will see:

```
We're opening new stores all the time!
```

### Example 2 (ifcondition all)

You want to tell only women with white cats living in Springfield, Illinois, about your new store there. You also store information on gender, pet ownership, and pet color in the *members\_* table. Simply add more conditions:

```
%%  
ifcondition all  
members .city springfield  
members .state IL  
members .gender F  
members .pettype cat  
members .petcolor white  
"Come see our new Springfield store!"  
"We're opening new stores all the time!"  
%%
```

Female, white-cat-owning residents of Springfield, Illinois, will see:

```
Come see our new Springfield store!
```

The rest of us will see:

```
We're opening new stores all the time!
```

### ifcondition any

Use the "ifcondition any" command when you want certain content to be inserted when **any** of a particular set of conditions are true (i.e., condition1 or condition2 or condition3...).

The "ifcondition any" syntax is:

```
%%  
ifcondition any  
tablename.fieldname1 value1  
tablename.fieldname2 value2  
...  
tablename.fieldnamex valuex  
"content-if-true"  
"content-if-false"  
%%
```

Here, for each individual recipient, the command evaluates whether every field is equal to the listed value. The first condition, for example, looks in table *tablename1* for the field *fieldname1*. If the value in that field is equal to *value1*, then the command concludes that condition is true. There is no limit on the number of conditions you can have.

If **any** the listed conditions are true, the command prints `<content-if-true>`. If all of the conditions are false, the command prints `<content-if-false>`.

### Example 3 (ifconditional any)

You want to tell people living in the states of California, Washington, and Oregon that they will now be covered by a new salesperson.

```
%%
ifcondition any
members .state CA
members .state WA
members .state OR
"Your new account rep is Sheila!"
"
%%
```

Recipients who live either in California, Washington or Oregon will see:

```
Your new account rep is Sheila!
```

If a recipient doesn't live in any of these states, they'll see nothing at all. You could of course specify that something else be printed if none of the conditions are met.

### Example 4 (combining conditional content commands)

Say you send a regular direct marketing HTML email to all your customers. If they own a dog, their email will contain a special promo for dog food. If they own a cat, they receive a promo for cat food, and similarly for hamsters. If they own any combination of the above, the email will contain promos relevant to each of their animals. If they do not have any of the animals above, only the basic message is sent.

All pet ownership data is kept in a series of true/false fields that allow customers to select multiple pet interests.

```
%%
ifcondition any
members .hasdog T
members .hascat T
members .hashamster T
" <p>
  We're having a special promotion on:<p>
  <ul>
  [%iffield members .hasdog T < <li>Dog food! > <>%%]
  [%iffield members .hascat T < <li>Cat food! > <>%%]
  [%iffield members .hashamster T < <li>Hamster food! > <>%%]
  </ul>
  <p> "
```

The first part determines whether they have an appropriate pet at all; the second part provides a bulleted, HTML list of appropriate promotions. You could also use such conditions to turn large, formatted blocks of text or table rows on and off.

# ifboolean

---

Use the "ifboolean" command when you want to create a condition with multiple fields linked by ANDs and ORs.

The "ifboolean" syntax is:

```
%%
ifboolean
tablename.fieldname1 operand value1 AND/OR
tablename.fieldname2 operand value2 AND/OR
...
tablename.fieldnamex operand valuex
"content-if-true"
"content-if-false"
%%
```

If you mix ANDs and ORs, you will need to use parentheses to group expressions.

How it works: for each individual recipient, the command evaluates whether the entire condition statement is true. If the condition is true, the command prints *content-if-true*. If the condition is false, the command prints *content-if-false*.

## Supported Operands

- = equals
- < less than
- > greater than
- <= less than or equal to
- >= greater than or equal to
- <> is not equal to
- contains contains
- doesnotcontain does not contain
- endswith ends with
- beginswith begins with

See below for examples of how these are used.

### Example 1

You want to include a paragraph that goes to all Florida residents whose interests are dogs or cats.

```
%%
ifboolean
address.state = FL AND
(members .interestdog = T OR
 members .interestcat <> T)
"We have a special for your pet!"
"
%%
```

### Example 2

You want to include a paragraph that goes to all Florida and Georgia residents whose interests are dogs or cats.

```
%%
ifboolean
(address.state = FL OR
 address.state = GA) AND
(members .interestdog = T OR
 members .interestcat = T)
"We have a special for your pet!"
"
%%
```

### Example 3

You want to include a paragraph that goes to all Florida and Georgia residents whose interests are dogs or cats, but not if they have a lizard interest.

```
%%
ifboolean
((address.state = FL OR
 address.state = GA) AND
 (members .interestdog = T OR
 members .interestcat = T)) AND
members .interestlizard <> T
"We have a special for your pet!"
"
%%
```

### Example 4

You want to send a special a message to all California residents who joined your list after March 1, 2001.

```
%%
ifboolean
address.state = CA AND
members .DateJoined > 2001/03/01
"Special message!"
"
%%
```

### Example 5

You want to send a special a message to all northern California residents (designated by a range of zip codes) who have an interest in basket weaving. NOTE: if parentheses are used with quotes, a space must separate the parentheses and the quote.

```
%%
ifboolean
((address.zip > 91000 AND
 address.zip < 95000) AND
 members .interest = "basket weaving" )
"Special message!"
"
%%
```

### Example 6

You want to send a special a message to all AOL customers living in New York.

```
%%
ifboolean
members .EmailAddr  endswith aol.com AND
address.state = NY
"Special message!"
"
%%
```

### Example 7

You want to send special content if member name information is blank they joined in the year 2000.

```
%%
ifboolean
members .FullName = " AND
(members .DateJoined >= 2000/01/01 AND
members .DateJoined <= 2000/12/31)
"Special message!"
"
%%
```

### Example 8

You want to send a message to everyone outside California.

```
%%
ifboolean
address.state <> CA
"Special message!"
"
%%
```

Note that you could also do this with the "ifcondition" command, with the message as your default text:

```
%%
ifcondition
address.state CA
<>
"Special message!"
%%
```

## ifrange

---

Use the "ifrange" command in situations where you simply want to know whether a numerical field is within a certain range of numerical values.

The "ifrange" syntax is:

```
%%
ifrange tablename.numfield
numvalue1a numvalue1b "content1"
numvalue2a numvalue2b "content2"
```

```
. . .  
"defaultcontent"  
%%
```

Here is what it's doing: for each individual recipient, the command looks in the table *tablename* for the field *numfield*. If the field's numerical value is between *numvalue1a* and *numvalue1b*, then the command prints *content1* and ends the script. (Note that it will also print the content, if the field value is equal to one of the range. If the field's numerical value is between *numvalue2a* and *numvalue2b*, then the command prints *content2*, and so on. You can have as many value-value-content groupings as you like - but make sure each value has a content result.) If the field is not equal to any of the values, the script prints *defaultcontent*.

### Example 1

Having opened a new store in Oakland and Miami, Testco wants to add a special notice in their regular newsletter to all local customers. Testco stores zip code information in the *zip* field in the *address* database table. Notice that, because zip codes can be discontinuous, you may wish to repeat content with different blocks of zip codes.

```
%%  
ifrange address.zip  
33122 33196 "Come see our Miami store!"  
94601 94613 "Come see our Oakland store!"  
94619 94621 "Come see our Oakland store!"  
"We're opening new stores all the time!"  
%%
```

Joe, who lives in zip code 94605, would see:

```
Come see our Oakland store!
```

Dennis, who lives in zip code 33128, would see:

```
Come see our Miami store!
```

Tenzing, who has no zip code information, would see:

```
We're opening new stores all the time!
```

### Example 2

In a direct mail campaign, you want add a notice telling students and seniors about special discounts available to them. You already have information on their age stored in the *members\_* table.

```
%%  
ifrange members .age  
13 23 "Special for students: 20% off!"  
60 120 "Special for seniors: 30% off!"  
"  
%%
```

Note that, while *ifrange* does not support greater or less than, it is easy to create a range which would include everyone above a certain number by simply fixing one value

to be extremely high or low. For example, no one is likely to be older than 120, so you can indicate "60 or older" by simply making the range limits 60 and 120.

Joe, who is 20, would see:

```
Special for students: 20% off!
```

Tenzing, who is 70, would see:

```
Special for seniors: 30% off!
```

Dennis, who is 40, would see nothing, since *defaultcriteria* is blank.

## ifdate

---

Use the "ifdate" command in situations where you simply want to know whether a date field is within a certain range of date values.

The "ifdate" syntax is:

```
%%  
ifdate tablename.datefield  
yyyy/mm/dd yyyy/mm/dd "content1"  
yyyy/mm/dd yyyy/mm/dd "content2"  
. . .  
%%
```

Here is what it's doing: for each individual recipient, the command looks in the table *tablename* for the field *datefield*. If the field's date value is between the first condition's two date values (in the format *yyyy/mm/dd*), the command prints *content1* and ends the script. If the field's date value is between the second condition's two date values, the command prints *content2*, and so on. (You can have as many date-date-content groupings as you like -- but make sure each value has a content result.) If the field is not equal to any of the values, the script prints *defaultcontent*.

### Example 1

You want to insert an introductory line in your monthly text newsletter thanking customers who joined your list recently or long ago.

```
Newsletter for July 1, 2002  
  
%%  
ifdate members .DateJoined  
2002/06/01 2002/07/01  
  
1995/01/01 1999/12/31  
  
"  
%%Dear...
```

Note that we inserted a inserted a line break after the special message, so that the thank you would appear on a line of its own.



Joe, who joined in the last month, would see:

```
Newsletter for July 1, 2002  
WELCOME NEW CUSTOMERS!  
Dear...
```

Dennis, who joined in 1998, would see:

```
Newsletter for July 1, 2002  
THANKS VETERAN CUSTOMERS!  
Dear...
```

Tenzing, who joined in 2000, would see:

```
Newsletter for July 1, 2002  
Dear...
```

## showpercents

---

ListManager has the ability to send particular messages to a percentage of your list. This feature is useful if you would like several advertisements rotated in your list, or if you would like a particular advertisement sent to only part of your list. The percentage chosen to receive each message is random—those delivered to first will have the same chances of receiving a particular message as those delivered last.

The text block rotated may be plain text, HTML or blank.

For each text block, you select the percentage of recipients who should receive it. Note that the sum of all the percentages cannot exceed one hundred. In other words, if you have one text block displayed 60% of the time, and another 60% of the time, you will receive an error message—you will not have 20% receiving both messages. If you'd like to do so, insert two percentage conditions, each with 60% text block, 40% blank text.

The "showpercents" syntax for a percentage of recipients is:

```
%%showpercents {60 text block 1 40 text block2} uniqueness%%
```

60 and 40 are the percentage of recipients who should receive each message. Text block 1 and text block 2 is the text that should be rotated. Uniquename must be a name unique on this server to label this showpercents tag.

The "showpercents" syntax for a percentage of mailings is:

```
%%before ;showpercents {60 text block 1 40 text block2}  
uniquename%%
```

The syntax is the same for a percentage of recipients, but the "before" command is added so that it is applied to the entire mailing. For more information about the before command, see [Script Execution Points](#).

## Invite (for referrals)

### Invite (Referral Feature)

---

Referral forms help your list members to invite their friends to join your list. You may track how many friends were referred by list members, how many opened or clicked on a tracking link in the invitation, and how many ultimately joined the list.

Here's how it works:

1. You send out a mailing to your list with a referral link asking members to invite their friends to join the list.
2. List members click on the link, and enter the email addresses of those they'd like to invite, and an optional message for them.
3. The invited members receive an email message telling them how to join the list. If they follow the instructions in the invitation, they become a list member.

To use the referral feature, you must first create an invitation—a message that will be sent to those referred telling them how to join the list. This can be accomplished easily using the Invitation Template in [Content](#), which can be customized to fit your needs. Next, you must [create a referral form](#)—the web page members are taken to when they want to invite a friend to join the list. Finally, you must [insert a referral link](#) into your mailing (or into the mailing content).

See [Referral Tracking](#) for step-by-step instructions on how the referral feature works. To insert an invite link manually, you must use the invite command.

The syntax for an invite link is:

```
%%invite 1 2 -detect open -detect html -dest url  
http://www.example.com%%
```

#### **invite**

The command to insert a referral link.

#### **1**

The DocID\_ in the Docs\_ table of the invitation document that should be sent to those who are invited.

#### **2**

The DocID\_ in the Docs\_ table of the referral form referrers should be taken to when they click on this link.

**-detect\_open**

If included in the command, the invitation will detect opens of those who are invited.

**-detect\_html**

If included in the command, the invitation will detect whether or not those who are invited can see HTML.

**-dest\_url**

If included in the command, the destination URL referrers will be taken to after referring friends to the list. If none is specified, they will be taken to a generic page thanking them for referring friends.

## Advanced Mail Merge and Tcl Scripting

### Advanced Scripting Introduction and Index

---

Custom Scripts allow you to insert complex, dynamic content into your messages. In ListManager, you can do this with a highly flexible programming language called Tcl (pronounced "tickle").

Tcl was designed specifically to make scripting easy to learn and use. As a result, you don't have to be an advanced programmer to create custom scripts -- and the examples in the sections below will show you ways of dealing with common problems. People with programming experience, however, will find that Tcl also has powerful tools for interacting with customer data, and can permit you to do most anything you want.

Advanced Scripting is not available for ListManager Standard licenses. It must be enabled in [Utilities: List Settings: For Programmers: Email Scripting](#) and [Utilities: Administration: Server: Server Settings: Security](#).

## Tcl Scripting and Advanced Mail Merge

---

### Introduction

ListManager utilizes a built-in scripting language which can be used to customize message content. In this context, scripts are short computer programs that can be used to perform some function. In this case, the result of the execution of a script is a *string* of text that is inserted into an email message. These scripts can range in complexity from simple statements to complex programs. This section and the sections that follow will guide you from the simplest forms of mail-merge that simply insert the contents of a database field to the more powerful scripts that can perform SQL queries and format the results in HTML.

### Tcl

Scripting in ListManager is supported using an embedded interpreter for a language called "Tcl" (pronounced "tickle"). Tcl is a powerful, text-oriented scripting language that has been around for many years and has a strong following and support base. It is important to note that, due to the context of where it is used in ListManager, the Tcl language used in ListManager differs slightly from standard Tcl. The differences are detailed in the section [ListManager Tcl vs. Standard Tcl](#).

This section of the manual will get you started with Tcl and show you how to use many of the scripting commands added in ListManager. The information you'll find here may be all you need to create complex and highly individualized messages. If you wish to learn more about Tcl and leverage some of the more advanced text formatting and processing features, there are many good books available. More information about this powerful scripting language can be found at: <http://www.scriptics.com/scripting/> .

## Delimiters

Tcl scripts are embedded inside email messages by enclosing them between the Tcl *delimiters*. The delimiters used to start and end a Tcl *tag* are both "%%". All text between and including the delimiters will be replaced with the result of the script evaluation. If you wish to use these characters inside your email message and you don't want them interpreted as a script delimiter, you must put a backslash ( \ ) before the first % symbol. For example, if you want the text: "Scripts are delimited by %% characters." to show up properly in your message, insert a backslash before the first '%' symbol:

```
Scripts are delimited by \% characters.
```

This backslash will be removed when the message is processed.

## Commands

Fundamental to the Tcl programming language is the concept of a *command*. A command is used to pass data to an internal function and then return the results of that function as a text string. To modify how the command functions, you add *arguments* to the command. The results returned by the command replace the script including its delimiters. It is possible to add your own commands to Tcl. These types of commands are generally referred to as *procedures*. Sometimes the terminology blurs the difference between these two concepts since calling a *procedure* is essentially identical to calling a *command*.

The simplest form of a Tcl script is a single command call:

```
%%command argument1 argument2 ...%%
```

where "command" is what you want to do and "argument1" and the following arguments give the command more information about how to do what is required of it. Note that some commands take no arguments.

## The 'merge' Command

The *merge* command is the most commonly used Tcl command and also one of the most useful and flexible. *merge* performs the common mail merge function, meaning it can merge in personal information into a message. In general, this personal information will be data stored in a database table. This data can be stored in the ListManager *members* table or it can be from other tables that ListManager has access to.

The merge command takes a single argument which is database column name. The common form of this command is:

```
%%merge tablename.fieldname%%
```

where *tablename* is any table that ListManager has a key into and *fieldname* is a field in that table. The standard tables that ListManager has access to are:

- members\_** stores information about each member in a list
- lists\_** stores information about a ListManager mailing list
- topics\_** stores information about the topic that this list is a member of
- sites\_** stores information about the site that this topic is part of
- inmail\_** stores the incoming mail message
- outmail\_** stores the message that is currently being sent.
- subset\_** stores information about the list subset that the current message was sent to

For example, to merge in a member's email address, you can use the merge tag:

```
%%merge members_.EmailAddr_%%
```

If you send to a *subset*, you can also access any tables that were part of the *join* ( that is, specified in the FROM and WHERE parts of the SQL statement ) in the *subset*. For example, if you joined to the table *demographics* in a subset, you can merge any field from that table. For example:

```
%%merge demographics.ZipCode%%
```

If no table name is specified, the *members\_* table is assumed. However, you must make sure that the field name is unique among any tables you have joined to. For example:

```
%%merge EmailAddr_%%
```

will work in general but if, as in the previous example, *demographics* had a column named *EmailAddr\_* then this would generate an error.

Additionally, the argument to *merge* can be any SQL that is valid in the SELECT part of an SQL statement. In this case, the argument must be encapsulated in curly braces ( { } ). For example:

```
%%merge {'''+members_.FullName_+' <'+members_.EmailAddr_+'>'}%%
```

will be replaced with:

```
"John Smith" <jsmith@somedomain.com>
```

The argument to *merge* can also be a Tcl variable or a command.

## Variables

Tcl is a text-based language. That means that almost every aspect of Tcl is based on *string* manipulation. Strings are returned by commands and are stored in *variables*. A variable is name for an internal storage area for a string. You can put something into a

variable, manipulate the variable, and then return the results. You can also put numbers into variables and perform numerical operations on them as described in a later section.

The most basic way to put something into a variable is with the `set` command. For example:

```
%%set message "Hello world!"%%
```

will put the string "Hello world!" into the variable `message`. In Tcl, strings are generally delimited using double-quotes ( " ). If you wish to use a double-quote inside of your string, prefix it with a backslash ( \ ). This is called *escaping* a character and is common in programming languages. You must also *escape* certain other characters in order to use them in a string. These include the dollar sign "\$" and the open and closed square brackets "[" and "]". Here is an example using escaped quotes:

```
%%set message "I said \"Hello world!\"."%%
```

will return

```
I said "Hello world!".
```

You can retrieve the contents of a variable by putting a dollar sign ( \$ ) in front of it. For example:

```
%%return $message%%
```

In this case, the contents of the variable `message` are returned from this script by using the `return` command. The `return` command will be the last thing executed in a script and the argument to this command is the text that is to be returned. It is important to note that if you don't specify a `return` command, the last string to be manipulated will be returned. For example:

```
%%set message "Hello world!"%%
```

will not only set the variable `message` but it will also return the text that was assigned to it. The importance of this will become evident in the next section. It is recommended that you always use the `return` command at the end of your scripts to return the desired result. In the *merge* examples described previously, this is not required, but it will become necessary for more complicated scripts.

## Scripts

Scripts can, and generally do, have multiple lines and statements. In ListManager's Tcl implementation, each statement **must** be terminated by a semi-colon ( ; ). This differs from standard Tcl, where a semi-colon is optional; the end of a line can also end the statement. The last command in a script does not need the semi-colon at the end, although it doesn't hurt to include one. The following is a short Tcl script that demonstrates the features described so far and introduces one new programming concept.

```
%%  
set email [merge members .EmailAddr ] ;  
return $email ;  
%%
```

In this example, we set the variable *email* to be the contents of the *members\_.EmailAddr\_field* and then returned the contents of that variable. We have also introduced the use of *square brackets* ( []). These brackets tell the Tcl interpreter to execute the command contained inside and return the results.

Variables can be used inside of other strings very easily. Simply include them in the content of the string and prefix them with a dollar sign as shown above. For example:

```
%%  
set world "world!" ;  
return "Hello $world." ;  
%%
```

In this example, the variables, *hello* and *world* are inserted into the string which is returned from this script. Similarly, you can also execute commands like *merge* inside of a string. For example:

```
%%  
set result "Your email address is [merge members .EmailAddr ]."  
;  
return $result ;  
%%
```

These simple features of the Tcl language in combination with the *merge* commands may be all you need to do highly personalized email messages. The next section introduces some important concepts in the message send and Tcl evaluation process.

## Conditional Statements

---

It is often desirable to modify the contents of a message based on the recipient's stored information. For example, suppose you were required to charge sales tax for purchases made in the state of California? You could use the *if* command in the following merge tag to insert this information only for recipients who live in California.

```
%%  
if { [merge demographics.State] == "CA" } {  
return "\nCalifornia residents must add 8% sales tax.\n" ;  
} else {  
return " " ;  
}  
%%
```

In this script, the contents of the *demographics.State* field is equal to the text string "CA" then the script will return a blank line followed by a line that says "California residents must add 8% sales tax.". Otherwise, it will return nothing. In Tcl, if you want to end a line, you must insert the characters "\n" into your string. In this case, the "\n" at the beginning simply inserts a blank line; the "\n" at the end will make sure that any text that follows this tag will begin on the next line.

Suppose you want to insert a different line into your message depending on the time zone that your customer is in? For the continental US, this would require four alternatives. This is also possible using the *if* command. For example:

```

%%
set timezone [merge demographics.TimeZone] ;
if { $timezone <= -8 } {
return "10am to 6pm PDT" ;
} elseif { $timezone == -7 } {
return "9am to 5pm MDT" ;
} elseif { $timezone == -6 } {
return "8am to 4pm CDT" ;
} else {
return "7am to 3pm EDT" ;
}
}
%%

```

This example assumes that your *TimeZone* field is an integer that defines the number hours past Greenwich Mean Time your customer is in.

These examples demonstrate the basic *if* command functionality. Note that the *else* and *elseif* parts of the *if* command are optional. For example, the first example could have also been simplified to:

```

%%
if { [merge demographics.State] == "CA" } {
return "\nCalifornia residents must add 8% sales tax.\n" ;
}
}
%%

```

It is good to get into the habit of explicitly returning an empty string, however. As noted in the introduction, not doing so can result in a script returning something that you did not expect.

Another useful conditional command is the *switch* command. The *switch* command simplifies the certain types of *if elseif else* type commands. For example, suppose you wanted to return a state name in place of a state code. This example will be limited to just a few conditions but it is equally valid with more. Using the *if* command, you could do this:

```

%%
set state [merge demographics.State] ;
if { $state == "CA" } {
return "California" ;
} elseif { $state == "OR" } {
return "Oregon" ;
} elseif { $state == "WA" } {
return "Washington" ;
} elseif { $state == "NV" } {
return "Nevada" ;
} else {
return "Unknown" ;
}
}
%%

```

This is obviously very hard to read and quickly gets out of hand. You can accomplish the same thing using the *switch* command. The above example then becomes:

```

%%
switch [merge demographics.State] {
"CA" { return "California" }
"OR" { return "Oregon" }
"WA" { return "Washington" }
"NV" { return "Nevada" }
default { return "Unknown" }
}
%%

```



```
}  
%%
```

## Expressions

It is often useful to be able to do mathematical calculations using data specific to each recipient. This can be accomplished using the *expr* command. For example:

```
%%  
set balance [merge accounts.Receivable] ;  
set penalty [expr 0.10 * $balance] ;  
return "If your account balance is not paid in 10 days, please  
include a late fee of \$$penalty." ;  
%%
```

Notice that since we wanted to use the dollar sign "\$", we had to *escape* it using a back-slash in order to keep it from being interpreted as the beginning of a string.

## Script Execution Points

---

Tcl mail merge scripts can be processed at different times during the message send process. There are currently three different states at which Tcl tags can be executed:

1. Before the message send starts;
2. During the message send;
3. After the message send is completed or goes into retry mode.

The states at which scripts are executed are determined by the presence of special tags at the beginning of each script. These tags can be thought of as procedures, but are actually removed before any scripts are executed. For consistency, they obey the syntax of a procedure.

### Message-Level Scripts

When a message is sent, data that applies to the entire message and that doesn't change for each recipient is loaded once. There may also be scripts that need to be processed or certain table fields that need to be retrieved only once for the entire message. These are referred to as "message-level scripts" or "message-level data" since they apply to the entire message.

Message-level scripts are indicated by the inclusion of the keywords *init* or *before* that immediately follow the Tcl tag delimiters. For example:

```
%% init ; ... some message-level Tcl code ... %%
```

or

```
%% before ; ... some message-level Tcl code ... %%
```

Both of these tag types will be processed once for the entire message before the recipients are mail-merged. At this stage in the send, no recipient-level data is

accessible and any attempts to execute recipient-level procedures or merge recipient-level columns will result in an error.

They will be processed again at the beginning of processing any retries of the message.

The only difference between *init* tags and *before* tags is that *init* tags always return an empty string and *before* tags function as normal merge scripts. In Tcl, whatever the last string to be manipulated was is the return string of the script. For example:

```
%% before ; set variable "some value"%%
```

will return "some value" as if we had done:

```
%% before ; set variable "some value" ; return $variable%%
```

For this reason, the *init* tag was created. Any message-level initialization that does not require a string to be returned should be done in *init* tags. This will help guard against the inadvertent merging of data. *before* tags should be used for mail-merging text that only needs to be set once for the entire message.

Message level initialization strings that will be called every may be specified in [Utilities: List Settings: For Programmers: Email Scripting](#).

## Recipient-Level Scripts

Scripts that may return different results for each user are referred to as "recipient-level scripts" and a recipient's data is referred to as "recipient-level" data. This data is generally data from the members table but could be any data that is available via a join from the members table to any other accessible table. This join is done by sending to a subset where the join criteria has been defined as part of the subset. A "recipient-level" script requires no special tags. For example:

```
%% set variable [merge EmailAddr_] ; return $variable %%
```

## Send-Completion Scripts

---

When the current message send is completed or goes into retry mode, scripts defined as "after" scripts are executed. These scripts never have any impact on the content of the message because the message has already been sent by the time that these are executed.

Recipient-level scripts do not require any special keywords. In general, recipient-level scripts should only be used for scripts or merging fields that could change from recipient to recipient. Recipient-level scripts can execute message-level Tcl procedures or use message-level data. The reverse is not true.

Scripts to be run when the message is completed should be run in scripts using the tag "after". For example:

```
%% after ; sql tag execute "insert into results ..." %%
```

# Error Handling and Debugging

---

Tcl scripting in email messages is much different from programming in standard programming environments; normally when you make a mistake programming, that mistake isn't emailed to all of your customers! For this reason, there are some special debugging features built into ListManager. Even with these debugging features, it is recommended that you test your Tcl scripts with a test list.

## errormode

One of the most useful debugging features is the *errormode* procedure. The most common form of this procedure is:

```
%%init ; errormode notify your@emailaddr.ess%%
```

As described in the previous section, the *init* part of this script indicates that this script should only be evaluated once at the beginning of the message send and should always return an empty string.

The *errormode* procedure tells the Tcl processor to abort the message send when an error occurs and to send an error notification to the specified email address. To see where this might be useful, consider the following message text:

```
%%init ; errormode notify your@emailaddr.ess%%  
Dear %%merge members .FullName %%,  
...
```

In this case, the argument to merge has an error in the table name. In a normal message send, this would generate an error but the message would still continue to be send and other scripts processed. The result of a script with an error is normally an empty string. However, since the *errormode* procedure was used to set a notification address, the Tcl processor will stop processing this message and send a notification to the specified email address. This notification includes an error string that indicates what the error was and includes a copy of the script in which the error occurred.

Other error modes are documented in the section [ListManager Tcl Procedures](#).

## redirect

Another useful debugging feature is the *redirect* procedure. The argument to *redirect* is an email address which will always override the email address of the actual recipients. This means that you can send to your list as normal and have all of the messages go to the address you specified and not the list. For example:

```
%%  
init ;  
errormode notify your@emailaddr.ess ;  
redirect your@emailaddr.ess ;  
%%
```

This is useful for determining whether scripts execute properly for each member and whether the fields you expect to have data actually do. The problem with this feature is that if you are sending to a big list, you will get a lot of mail. You can use *redirect* as-is

for small test lists, but for large production lists, it is best used in conjunction with the *skip* procedure.

### skip

The *skip* procedure tells ListManager not to send to the current recipient. Along with some simple mathematics and some other Tcl procedures, you can have ListManager only send to every 1000th recipient. For example:

```
%%  
init ;  
errormode notify your@emailaddr.ess ;  
redirect your@emailaddr.ess ;  
%%  
  
%%if { [recipindex] % 1000 != 0 } { skip }%%
```

This form of testing is only recommended for advanced users. Most users should only test their scripts on test lists.

## ListManager Tcl Commands

---

### General Tcl Commands

The following Tcl commands can be used in either message or recipient-level Tcl scripts.

### sql

The *sql* Tcl command allows an administrator to execute an SQL statement and obtain the results. For security reasons, the administrator must login first using the *login* command. The *sql* command can be used to execute an SQL statement that returns a single result set or no results. That result set can have multiple columns and rows. SQL statements that return multiple result sets are not currently supported. The syntax for the SQL command is:

```
%%sql (tag) (function) (function arguments)%%
```

The first argument to the *sql* command is a tag that is used to identify the query when executing a statement and retrieving results. It allows multiple queries to be distinguished within a message.

It is important to note that queries that are done within a message-level Tcl script are in a different scope than those in a recipient-level script. Therefore, the tags that are used to identify them are also in different scopes. A tag used in a message-level script will be distinct from the same tag used in a recipient-level script. A tag can be any string.

A message-level script is executed only once for the message and a recipient-level script is executed for each recipient. The results of SQL queries executed in each of these scopes are stored separately and cannot be accessed from a different scope. In other words, recipient-level scripts cannot access the results of queries performed in a message-level script. The reverse is also true. Since the results of message-level queries might be required at the recipient level, they can be stored in variables and accessed for recipients without any command call overhead.

The second argument to the "sql" command is the name of the function that will be executed. These functions and their arguments are:

**sql (tag) execute (sql statement)**

This function will execute the specified SQL statement.

**sql (tag) numrows**

This function will return the number of rows that were retrieved.

**sql (tag) numcolumns**

This function will return the number of columns that were retrieved.

**sql (tag) columnname (column index)**

This function will return the name of the column at the specified index. The index must be between 1 and N where N is the number of columns retrieved.

**sql (tag) data (column index) (row index)**

This function will return the data that corresponds to the specified column and row indices. The row index must be between 1 and M where M is the number of rows retrieved. If the row index argument is omitted, it will default to 1. If both the column index and row index are omitted, they will both default to 1.

Here is an example of how to return all of the names and email addresses of everybody on the current list in the form:

Name = Full Name, Email = email@address

```
%%!  
init  
errormode debug  
login youradmin@email.addr yourpassword  
%%  
  
%%!  
sql listmembers execute "SELECT EmailAddr_, FullName_ FROM members_ WHERE  
List_=[list.name]"  
set numrows [sql listmembers numrows]  
set results "  
for { set row 1 } { $row <= $numrows } { incr row } {  
  set Name [sql listmembers data 1 $row]  
  set EmailAddr [sql listmembers data 2 $row]  
  append results "Name = $Name, Email = $EmailAddr\n"  
}  
return $results  
%%
```

**sendmessageIm**

This command is a simple method of sending a message using ListManager's standard message send system. This function takes four arguments:

**sendmessageIm (from) (to) (subject) (body)**

Due to the length of the subject and body, it may be more convenient to define these as variables to pass to this command. For example:

```
%% after ;
set From "me@myaddress.dom" ;
set To "me@myaddress.dom" ;
set Subject "message send has completed!" ;
set Body <
The message send for:
[merge inmail .HdrSubject ]
is complete.> ;
sendmessage $From $To $Subject $Body
%%
```

### process\_merge\_tags

The `process_merge_tags` `TclMerge` command is useful anytime you want to merge content from another source and have the merge tags evaluated. This command is very useful for HTML mailings. This command will most likely be used in mailings, but can apply to other documents, such as hello and goodbye documents as well. The `process_merge_tags` `TclMerge` command will evaluate any `%%`-delimited merge tags in the argument passed to it and return the results. Doing so is useful in cases where you want to perform a mail merge on text that is retrieved from the database or via http.

Note that these tags are evaluated as straight Tcl and therefore any `ListManager` Tcl language extensions will not work in these tags. For example, the "init" and "before" modifiers will not be evaluated properly and line unwrapping is not done. Additionally, any special merge tags that are not handled as normal Tcl procedures such as `%%MemberID_%%` will result in errors. You must use the `%%merge MemberID_%%` convention for all merged data fields.

Example:

```
%%process_merge_tags [httpget http://myserver/newsletter.html]%%
```

## Message Level Commands

---

The following commands are valid only in *message-level* or *send-completion* scripts.

### login

In order to use certain Tcl commands, the administrator must first log in. This is to keep someone from sending in a message containing malicious SQL or other hazardous code pretending to be an administrator by using the administrator's email address, a practice known as "spoofing".

The "login" command is called with the administrator's email address and password. The syntax for this command is:

```
%% init ; login (email address) (password) %%
```

Since this command requires a database query to determine if this address and password are those of an administrator, it should only be used in message-level scripts -- Tcl scripts that begin with `%%init ;` or `%%before ;`. Otherwise, the query will be done for each recipient, and it will slow down the send.

## redirect

For testing purposes, it is advantageous to be able to preview what each recipient will see when their message is mail-merged. The "redirect" command will allow the administrator to redirect all messages to a specified email address.

The syntax for this command is:

```
%% init ; redirect (email address) %%
```

## errormode

Since Tcl can be a tricky language to program, debugging message sends will almost certainly be required or desirable. In order to make sure that the Tcl in the message executes properly, the sender should turn on error handling so that if there is an error, the message send stops and the sender is notified. The following error modes are supported: notify, abort, replace, debug, and normal.

The most helpful use of this command is the "notify" mode:

```
%% init ; errormode notify user@domain.ext %%
```

When this mode is set, any Tcl errors will cause the message send to stop and an email that details the error description and the tag in which it occurred will be sent to the specified email address.

The "abort" error mode simply causes the message send to stop but no notification is sent. The error text can be found in the transaction log for the message. The syntax for this mode is:

```
%% init ; errormode abort %%
```

The "replace" error mode will cause the tag in which the error occurred to be replaced with the specified text. The syntax for this mode is:

```
%% init ; errormode replace "replacement text" %%
```

The "debug" error mode will replace the tag with the error string. This string indicates what the error was and the text of the script.

The "normal" error mode replaces the tag with an empty string. This is equivalent to calling "errormode replace" with an empty string. This is the default behavior.

## mailtest

This command, which takes no arguments and returns an empty string, tells ListManager to put this message into "mailtest" mode. This means that the send will proceed as normal and go through the standard SMTP transaction but will reset before the message data is sent to the server. Any messages sent in this mode will not reach the recipients. This should only be used for testing mail-merge and send speeds. Since messages sent this mode are otherwise indistinguishable from a standard send, handling of transient or permanent failures for bad or intermittent email addresses will still apply.

## Recipient Level Commands

---

## recipindex

This command takes no arguments and returns a number that indicates the relative index of the current recipient during the current send. It is based on the range 1 to N where N is the total number of recipients to which the message is being sent. The ordering is based on the retrieval order from the database but isn't guaranteed to be in this order.

## numrecips

This command takes no arguments and returns the number of total recipients that are being sent to. This number represents N in the range of results returned by the "recipindex" command.

## skip

There are times when the sender of a message may want to not send to certain recipients that would be part of a normal send. For example, if the sender was testing a message with the "redirect" command but they were sending to a list with 100,000 messages, they would receive 100,000 copies of the message. Or, the sender might want to do mail-merge for the entire send and verify that there were no errors before doing the actual send.

Using the *skip* command, which takes no arguments and returns an empty string, the sender could send to every 1000th recipient and skip the rest using the following Tcl mail-merge tag:

```
%% if { [recipindex] % 1000 != 0 } { skip } %%
```

This means that if the index of this recipient as retrieved by the *recipindex* command is not evenly divisible by 1000 then it will be skipped.

The sender could skip every recipient by simply adding the tag "**%%skip%%**" to the end of the message.

When the "skip" command is executed, further processing of the current message is stopped so if you are testing the message to make sure that all the scripts are executed properly, call this command at the end of the message. Otherwise, call it at the beginning.

## abort

This command terminates the sending of the current message. If the error mode was currently set "notify," then the notification will be sent. Otherwise, the error mode will be set to *abort* and an error will be generated causing the message send to stop. *abort* can be called with a text string argument which will be passed on as the error text. For example:

```
%%abort "Terminating this message send."%%
```

## memberstable, emailaddrcolumn, and memberidcolumn

---

The name of the members table and the column names of the email address and member ID are all configurable by the server administrator. These commands return



these names. When writing custom Tcl commands for library code, use these commands in place of **members\_**, **EmailAddr\_**, and **MemberID\_**

### **memberidchar**

Each member in the ListManager database has a unique ID and for each ID, there is a special code character which is a single letter. The ID and code character are used in many places for the validation of confirmations and unsubscribes. The code character makes it harder to accidentally unsubscribe someone else by typing in the wrong ID. The *memberidchar* command returns the member ID and the code character as a string that can be used in your scripts. For example:

```
To unsubscribe, click here:  
http://www.yourdomain.dom/u?id=%memberidchar%&c=F
```

### **emailunsub**

The member unsubscribe address is fundamental to the operation of a mailing list and our failsafe unsubscribe feature makes it convenient and simple for a member to unsubscribe. The *emailunsub* command will return an unsubscribe address specific to the current member. This command is equivalent to the legacy *subst* tag version: `$subst('email.unsub')` which is also supported via the Tcl command "subst email.unsub".

## **Legacy Subst Commands**

---

ListManager has always had some mail-merge capability using special *subst* tags of the form **\$subst('argument')**. All of these commands are supported in the new mail-merge functionality. Prior to 6.0h, the form of the tag was `subst (argument)`, which conflicted with the Tcl `subst` command. For 6.0h and higher, the form of the new tags is:

### **lmsubst (argument)**

where (*argument*) is the same argument that was passed to the original `$subst` version.

**IMPORTANT NOTE:** When upgrading to ListManager 6.0h and higher, those who have created scripts using the ListManager `subst` command must update them to use `lmsubst`.

## **Differences between ListManager Tcl and Standard Tcl**

---

The Tcl language used by ListManager is slightly different from normal Tcl implementations. The differences are subtle but important. There are also some important additions to the syntax that allow the user to get around some of the problems involved with using a scripting language in an email message.

### **Line Wrapping**

The most important difference between ListManager Tcl and standard Tcl is in the way that line breaks are handled. Since most email clients automatically word-wrap outgoing

mail, it is likely that Tcl scripts would be broken by these line breaks. In Tcl, the end of the line ends the current statement. Additionally a single semi-colon (;) also ends the current statement. So, to avoid inadvertent line breaks, all line breaks in Tcl scripts are removed and replaced with a single space. This requires the user to end all statements with a semi-colon.

For example, the Tcl script:

```
for { set i 1 } { $i <= 3 } { incr i } {  
  set j [expr 2 * i]  
  set k [expr j * i]  
  append result "$i, $j, $k\n"  
}
```

which is valid standard Tcl, will not be processed correctly by ListManager Tcl. This is because the line breaks after the 'set' procedure statements will be removed. Therefore, the user must always terminate statements with a semi-colon.

For example:

```
for { set i 1 } { $i <= 3 } { incr i } {  
  set j [expr 2 * i] ;  
  set k [expr j * i] ;  
  append result "$i, $j, $k\n" ;  
}
```

Note that the semi-colon must always be preceded by a space and followed by a space or a line break.

The importance of this feature is evident in scripts where a single command line exceeds the line-wrapping width of the email client's editor. Most editors only do line-wrapping when the message is actually sent so that it is not possible to know exactly where the line will be wrapped. The process of removing line breaks is called 'line unwrapping' as opposed to 'line wrapping'.

Line unwrapping is done before the Tcl script is evaluated and it does not make any distinctions between quoted text and Tcl code. For example, the following Tcl script:

```
%%set result "The domain name for your email address [merge  
EmailAddr ]  
is [getdomain [merge EmailAddr_]]"%%
```

has a line break in the middle of a string. In standard Tcl, this requires the use of a backslash (\) at the break point as in:

```
set result "The domain name for your email address [merge  
EmailAddr ]\  
is [getdomain [merge EmailAddr_]]" ;
```

In ListManager Tcl, the line break is turned into a single space. In standard Tcl, the use of the backslash at the point of the line break has additional functionality. All whitespace (i.e. non-printing characters such as line-breaks, tabs, and spaces) after the backslash is removed and replaced by a single space. This makes it possible to do the following:

```
set result "The domain name for you email address [merge  
EmailAddr ]\  
is [getdomain [merge EmailAddr_]]" ;
```

In this case, the spaces at the beginning of the second line will be removed and the entire break will be replaced by a single space. If you do not end the line with a backslash, then all the spaces at the beginning of the next line will be included in the result.

The backslash is also used in Tcl to continue Tcl code on the next line as in:

```
for { set i 1 } { $i <= 3 } \  
{ incr i } { ...  
}
```

This is not required in ListManager Tcl because lines are always wrapped. Extra whitespace is ignored. It is only noticeable when it is in a string because this is generally what is visible to the user. For consistency, it is recommended that you use the backslash when inserting new lines in Tcl scripts.

There is another problem that cannot be solved automatically through line unwrapping. There are some strings that exceed the word-wrapping width of a mail-client that don't have any spaces. In this case, it cannot be safely broken at a space and is generally just broken at the wrap width. The most common case of this is long URL's. To get around this problem in Tcl, you can construct the string in pieces where each piece is less than the word wrapping width. For example:

```
%%  
set mystring "  
append mystring  
"http://www.somelongdomainname.com/cgi-bin/somescript.pl"  
"?someparameter=somevalue"  
"&someotherparameter=someothervalue"  
"&yetanotherparameter=yetanothervalue" ;  
return $mystring ;  
%%
```

Make sure you set *mystring* to an empty string before you do append otherwise you will keep appending to the same string for each recipient.

It is possible to disable the line unwrapping step by including an exclamation mark (!) immediately after the first %% mail merge tag delimiter. Care must be taken to avoid any undesired line-wrapping when the message is sent.

For example

```
%%!  
for { set i 1 } { $i <= 3 } { incr i } {  
set j [expr 2 * i]  
set k [expr j * i]  
append result "$i, $j, $k\n"  
}  
return $result  
%%
```

## Text Quoting

Another important addition to ListManager Tcl is the inclusion of block-quoting delimiters '<' and '>'. Any line breaks that occur within these quotes are converted to "\r\n" sequences. These are special characters that are converted by Tcl into a line break within the string. Additionally, any normal quotes ( " ) are converted to 'escaped'

quotes (i.e. \" sequences that represent a quote to Tcl) which allows them to be included in a Tcl string variable. The '<' and '>' characters are converted to normal quotes.

This allows the following:

```
%%set advertisement
<blah blah blah blah blah blah blah
blah blah blah "quoted blah" blah blah
more blah blah blah>%%
```

to be converted to a legal Tcl statement:

```
set advertisement "blah blah blah blah blah blah blah\r\nblah
blah blah \"quoted blah\" \r\nblah blah more blah blah blah"
```

which is interpreted and returned by Tcl as:

```
blah blah blah blah blah blah blah
blah blah blah "quoted blah" blah blah
more blah blah blah
```

Procedures and variables are still processed as normal within these quotes as in:

```
%%set advertisement
<blah blah blah $variable blah blah blah
blah [someprocedure] blah "quoted blah" blah blah
more blah blah blah>%%
```

Since all normal quotes are 'escaped' within block quotes, it is not possible to use them as Tcl, non-string, quotes as in:

```
%%set advertisement
<blah blah blah $variable blah blah blah
blah [someprocedure "some argument"] blah "quoted blah" blah
blah
more blah blah blah>%%
```

The [someprocedure "some argument"] text will be converted to [someprocedure \"some argument\"] which is probably not what was wanted. If you need to quote any text for a procedure within block quotes, use the '{' and '}' style quotes.

If you wanted to process Tcl code in the quoted argument then use a variable and set the argument text before you quote your block of text. For example:

```
%%set argument "argument with a [tcl procedure] and $string
variable" ;
set advertisement
<blah blah blah $variable blah blah blah
blah [someprocedure $argument] blah "quoted blah" blah blah
more blah blah blah>%%
```

or

```
%%set somestring [someprocedure "argument with a [tcl procedure]
and $string variable"] ;
set advertisement
<blah blah blah $variable blah blah blah
```

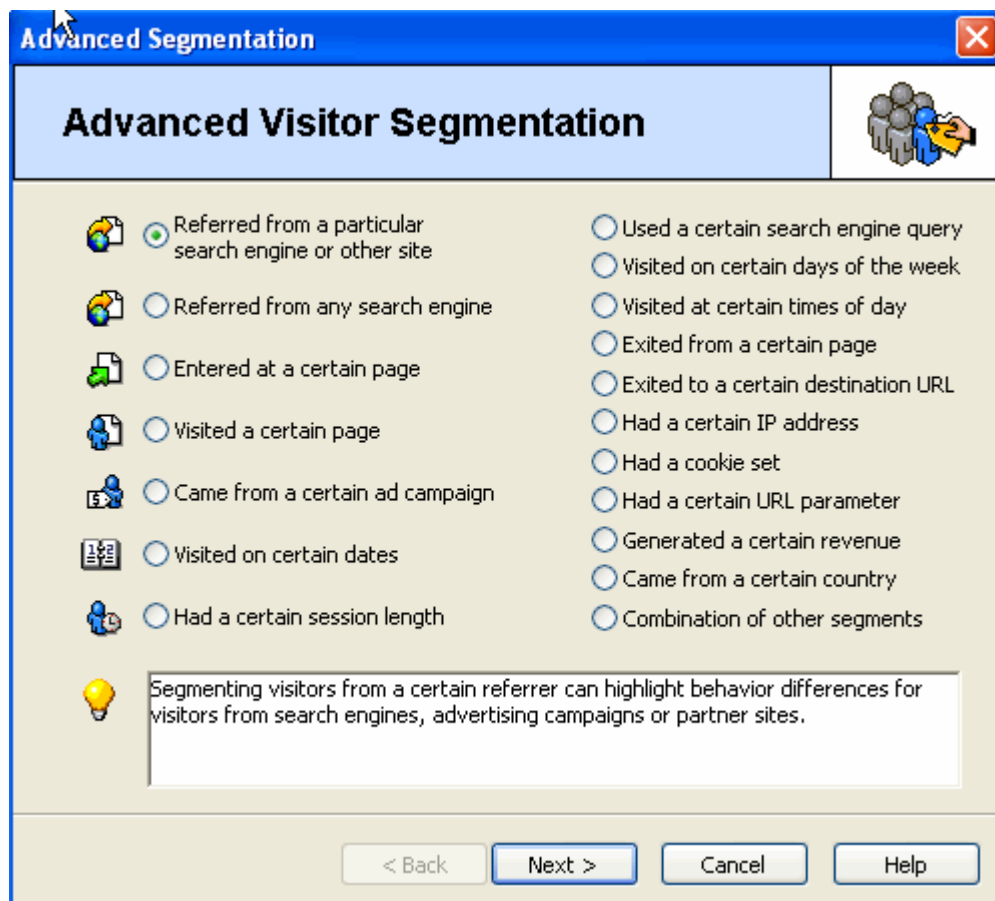
```
blah $somestring blah "quoted blah" blah blah  
more blah blah blah>%%
```

# Using ListManager with ClickTracks

## Using ListManager with ClickTracks: Overview

ClickTracks is a web analytics software package produced by Lyris; it helps you track and understand the impact your email campaigns are having on leads, conversions and more. Using ClickTracks and ListManager together gives you much more powerful segmentation and reporting tools than if you use ListManager alone.

To give you an idea of the different kinds of segments you can create in ClickTracks (and then use in ListManager), here is the ClickTracks Advanced Visitor Segmentation :



[Learn more about ClickTracks' segmentation features](#)

Harnessing the power of the ListManager/ClickTracks integration is a three-phase process:

1. Set up ListManager to work with ClickTracks.
2. Set up ClickTracks to work with ListManager.

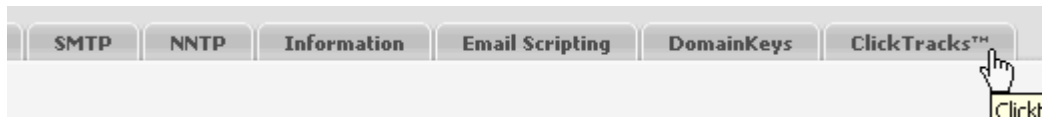
3. Generate segments in ClickTracks based on activity from a ListManager mailing.

[Next: Learn how to set up ListManager to work with ClickTracks.](#)

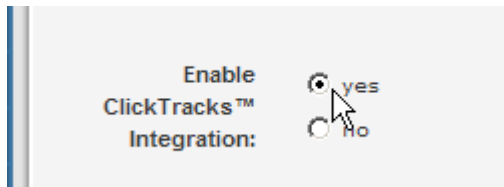
## Phase I: Set Up ListManager to Work with ClickTracks

### In ListManager:

1. In the left Navigation bar, go to **Utilities > Administration > Sites**.
2. In the **Site Name** column, click the name of the site you want to work with.
3. Click the **ClickTracks** tab.



4. For **Enable ClickTracks Integration**, select yes.

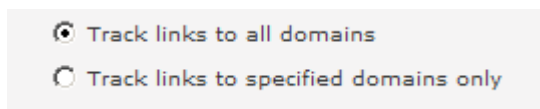


5. A string of text now displays in the **Integration Key** box.



Select this text, and then copy it to the Windows clipboard. To copy, you can right-click and then choose **Copy**, press Ctrl+C, or on the **Edit** menu, choose **Copy**. Later, you will paste this text into ClickTracks.

6. If you want to track links to all domains, choose that option.



If you only want to track links for specific domains, select **Track links to specified domains only**, and then type the domains in the **Domains** box.

Track links to specified domains only

*Enter each domain on a separate line. List all subdomains separately.*

```
bobsfruitsite.com
www.bobsfruitsite.com
www.clicktracks.com
clicktracks.com
```

Domains:

7. Click **Save**.

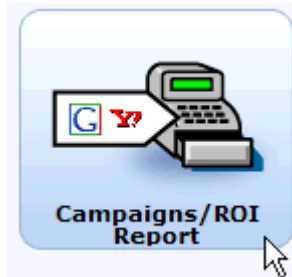
[Next: Learn how to set up ClickTracks to work with ListManager](#)

## Phase II: Set Up ClickTracks To Work With ListManager

After you [set up ListManager to work with ClickTracks](#), you must set up ClickTracks to work with ListManager. Note that before ClickTracks can generate segment information and send it **to** ListManager, it must import campaign information **from** ListManager. The ClickTracks server typically imports this data once every 24 hours, between 12 midnight and 1:00 a.m. This means that while you can initiate the importing process in ClickTracks at any time, you will not actually have data to work with, in most cases, until the following day. After data is received, you can proceed with generating segments.

### To set up ClickTracks to work with ListManager

1. On the ClickTracks home page, click the **Campaigns/ROI Report** button.

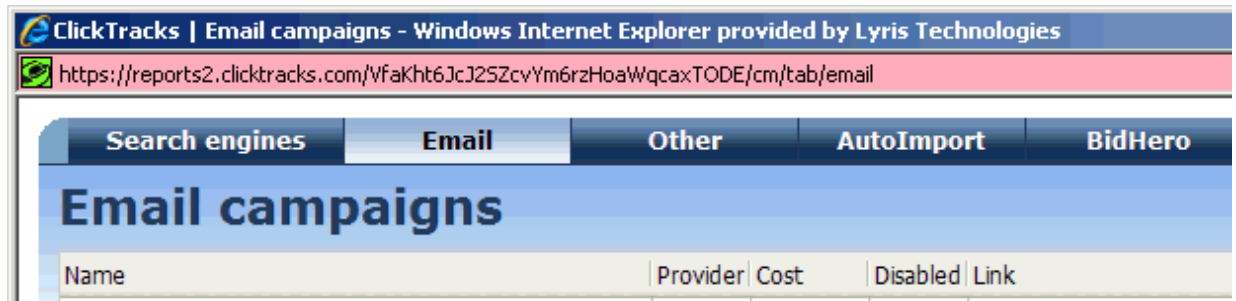


2. On the Campaign Report page, click the **Configure ad campaign tracking** button.

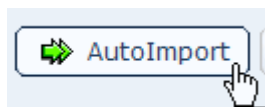




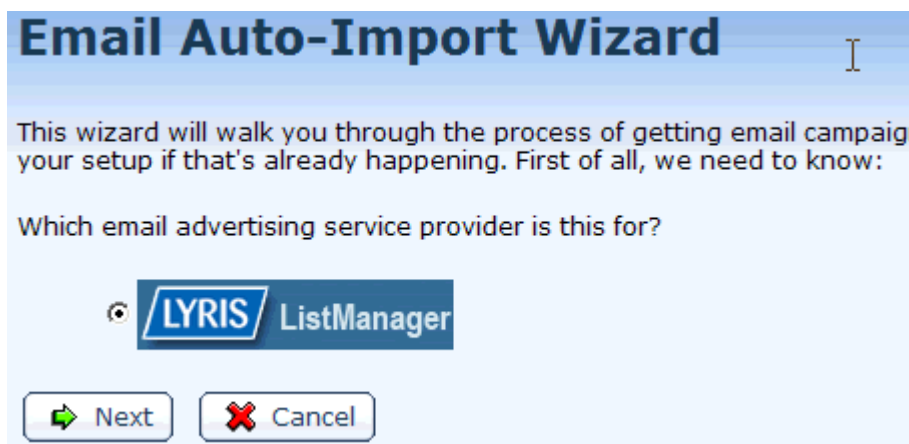
3. A new window opens that says "Email Campaigns." The Email tab at the top should be selected. If this is your first time importing, there will be no campaigns in the list.



4. Click the **AutoImport** button.



5. On the Email Auto-Import Wizard page, Lyris ListManager should be selected. Click the **Next** button.



6. On the Lyris Auto-Import Configuration page, paste the integration key that you copied from ListManager into the blank box (the integration key should still be in the Windows clipboard, so you can just do a paste operation in the integration key box).

## Lyris Auto-Import Setup

Dataset:  

Lyris/ClickTracks integration key ([what's this?](#)):

The integration key has been changed. You need to check it before it can be saved or used.

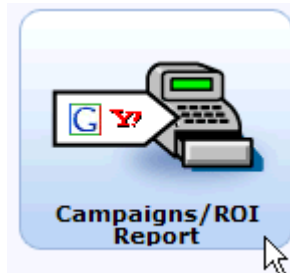
7. Click the **Check** button.
8. After the check has been completed, click the **Finish** button.

The ClickTracks server has now been set up to retrieve any activity related to the ListManager integration key you entered. As stated earlier, this typically happens once every 24 hours, between midnight and 1:00 a.m. After the data has been gathered, you can view the information in ClickTracks.

9. Click **Close**.

### To view campaign data after it has been received

On the ClickTracks home page, click the **Campaigns/ROI Report** button.



The Campaign Report page displays; the campaign information is listed on this page. You may have to scroll down to see it.

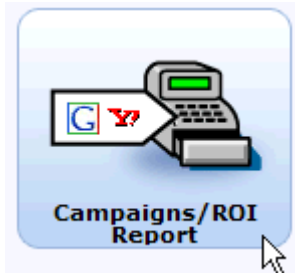
Total cost campaigns	Current date range			
	#clicks	#visits	Time on site	Short visits
<b>Campaign</b> ▲				
Email campaigns	19	9	95s	36.8%
5/10/2007 4:31:24 PM	4	2	6s	50.0%
1	1	0	0s	100.0%
1	1	2	19s	0.0%
2	2	0	4s	50.0%
2	0	0	-	- %
7/13/2007 12:09:01 PM	0	0	-	- %

[Next: Learn how to generate segments in ClickTracks based on activity from a ListManager mailing.](#)

## Phase III: Generate Segments in ClickTracks Based on Activity from a ListManager Mailing.

After you set up ListManager to work with ClickTracks and then set up ClickTracks to work with ListManager, you can use the data that ClickTracks has captured from ListManager campaigns to generate segments. You can then export the segments from ClickTracks to ListManager.

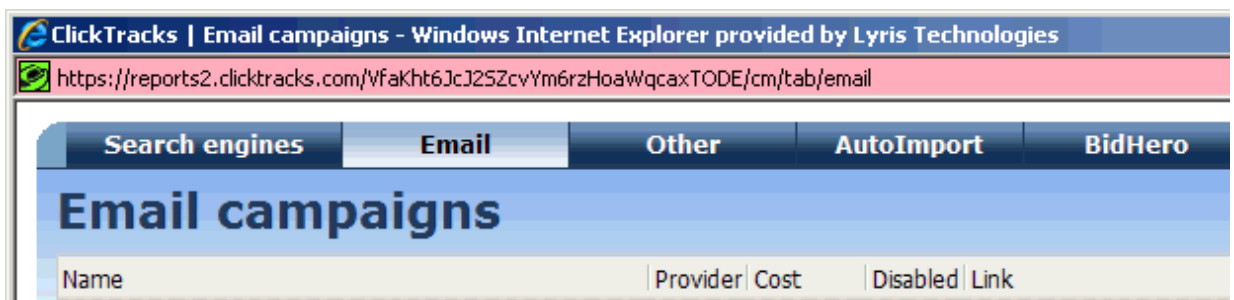
1. On the ClickTracks home page, click the **Campaigns/ROI Report** button.



2. On the Campaign Report page, click the **Configure ad campaign tracking** button.



3. A new window opens that says "Email Campaigns." The Email tab at the top should be selected.

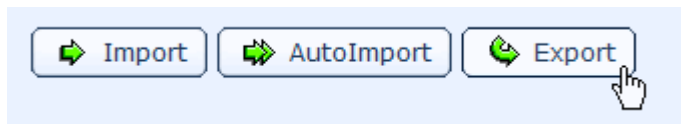


4. Select the campaign you want to work with.

Homepage 9/21/2007 3:42:31 PM	Lyris	0.00	<input type="checkbox"/>	../proxy/lyrismailing/70
Go Bananas 1619	Lyris	0.00	<input type="checkbox"/>	../proxy/lyrismailing/107
Mango 3/30/2007 10:43:19 AM	Lyris	0.00	<input type="checkbox"/>	../proxy/lyrismailing/2

Information about individual links in the selected campaign is displayed below the campaign list.

5 . Click the **Export** button.



6. On the Visitor Export Wizard page, choose the individual links you want data for, or **all links**, and then click the **Next** button.



7. On the Visitor Export Wizard > Label page, follow the instruction to choose a label or **All visitors**, and then click the **Next** button.



**NOTES:**

- A "label" in ClickTracks is the same thing as a "segment" in ListManager.
- If you want custom labels to appear as options in the Visitor Export Wizard > Label page, you must create them first. Instructions for doing so can be found in the ClickTracks Help, which can be reached by clicking the Help button on the main ClickTracks screen:



8. Select **Export** to Lyris ListManager, and type a name for the segment in the box.

A screenshot of the 'Visitor Export Wizard' dialog box. The title bar says 'Visitor Export Wizard'. Below the title, it says 'You can either export the list of visitors to a file, or have them sent to your Lyris ListM as a segment. Please choose:'. There are two radio buttons: 'Export to a file' (unselected) and 'Export to Lyris ListManager; call the segment' (selected). The selected option has a text input field containing 'Strong Prospects 1'. Below this is a checkbox labeled 'Segment already exists; please update it instead of making a new one' which is unchecked. At the bottom are three buttons: 'Back' (with a left arrow), 'Finish' (with a green checkmark), and 'Cancel' (with a red X).

9. Click the **Finish** button.

10. You will see an indication that the visitor list is being built. After this has completed, click the **Upload** button.

A screenshot of the 'Visitor Export Wizard' dialog box. The title bar says 'Visitor Export Wizard' and there is a 'Dataset: I' label on the right. The main text says 'The visitor list has been built. To upload it to the Lyris ListManager server, just click the "Upload" button.'. There are two buttons: 'Upload' (with a green right arrow) and 'Finish' (with a green checkmark). A hand cursor is pointing to the 'Upload' button.

A message appears telling you the list has been uploaded to ListManager.

11. Click the **Finish** button.

12. Click the **Close** button.

13. In ListManager, make sure the list that originally sent the mailings is the active list, and then click **Segments** in the side Navigation bar to confirm that the segment was exported from ClickTracks.

# Using ListManager with DomainKeys

## DomainKeys FAQ

The frequently asked questions below provide you with a good foundation for working with DomainKeys. To go directly to the topic that explains how to set up and use DomainKeys in ListManager, [click here](#).

### **What is email authentication?**

Email authentication is a way to ensure that email actually comes from whoever it claims to come from. It's a vital step in stopping spam, forgery, fraud, and even more serious crimes.

### **What is Domainkeys?**

DomainKeys is an email authentication system created by Yahoo. It gives email providers a mechanism for verifying both the domain of each email sender and the integrity of the messages sent (i.e., that they were not altered during transit). Since the actual domain can be verified, it can be compared to the domain claimed in the **From:** field of the message. If the sender is genuine, a profile can be established for that domain that can be tied into anti-spam policies. If the email is a forgery, it can be dropped, flagged or quarantined.

### **DomainKeys uses something called a digital signature. What is that?**

A digital signature is a technology used to simulate the security properties of a handwritten signature in digital form. This is accomplished by creating a "private key," available on your outbound mail servers, and a matching "public key," which you publish in DNS. When you send email, your email system automatically uses the stored private key to generate a digital signature of the message which is then attached to the message. The receiving email system fetches the public key from DNS and uses it to verify that the signature was generated by the matching private key (or not).

### **How does DomainKeys help with branding?**

Preventing forged email helps you in a number of ways, including branding. Using DomainKeys reduces the chance that someone will impersonate your domain and use it for fraudulent purposes, including "phishing attacks" -- the solicitation of personal information such as passwords, credit card numbers, etc.

### **How does DomainKeys help with deliverability?**

Using DomainKeys doesn't guarantee that your email will bypass any spam filters on the receiving end, but if your recipients can confirm that the email truly came from you, and if they consider you someone of good reputation, they are more likely to receive and open your mail.

### **What are email "headers"?**

Headers are pieces of information that get attached to email as it makes its journey from the sender, through various computers on the Internet, and on to the receiver. Here is an email that was sent from Yahoo; some of the more basic headers are outlined, including:

**Date:** the date the email was created.  
**From:** who sent the email (supposedly).  
**To:** who it's going to.  
**Subject:** the subject line created by the originator of the email.

This message is not flagged. [ <a href="#">Flag Message</a> - <a href="#">Mark as Unread</a> ]	
From Yahoo! Search Tue Aug 14 16:30:36 2007	
<b>X-Apparently-To:</b>	vtieto@yahoo.com via 66.196.100.87; Tue, 14 Aug 2007 16:30:14 -0700
<b>X-Originating-IP:</b>	[208.50.56.50]
<b>Return-Path:</b>	<bo-d7s239n14h9r8q141c3100813d49qh@b.one.yahoo-email.com>
<b>Authentication-Results:</b>	mta161.mail.re4.yahoo.com from=one.yahoo-email.com; domainkeys=pass (ok)
<b>Received:</b>	from 208.50.56.50 (HELO mta402.one.yahoo-email.com) (208.50.56.50) by mta161.mail.re4.yahoo.co
<b>DomainKey-Signature:</b>	a=rss-sha1; q=dns; c=noaws; s=200505; d=one.yahoo-email.com; b=RkoET3E1CKIZISezKnbwHbo8REbQPikw/+0Rf5ssykfWhg/PcztgW39mn4eEV2VYIOzcdOnCvuOaDPVoxE h=Date:Message-ID:From:To:Subject:MIME-Version:Reply-To:Content-type;
<b>Date:</b>	Tue, 14 Aug 2007 23:30:36 -0000
<b>Message-ID:</b>	<d7s239n14h9r8q141c3100813d49qh@one.yahoo-email.com>
<b>From:</b>	"Yahoo! Search" <search@one.yahoo-email.com> <a href="#">Add Mobile Alert</a> Yahoo! DomainKeys has confirmed that this message was sent by one.yahoo-email.com. <a href="#">Learn more</a>
<b>To:</b>	vtieto@yahoo.com
<b>Subject:</b>	New! Get all the music info you crave
<b>MIME-Version:</b>	1.0
<b>Reply-to:</b>	Yahoo! Search <support-d7s239n14h9r8q141c3100813d49qh@one.yahoo-email.com>
<b>Content-type:</b>	multipart/alternative; boundary="=d7s239n14h9r8q141c3100813d49qh"
<b>Content-Length:</b>	12526

### Why are headers important to DomainKeys?

When you use DomainKeys, a header called **DomainKey-Signature**: is added to each email. This header contains the digital signature of the message which was generated using the stored private key described in the above section about digital signatures.

### What is the difference between the "From" header and the "Sender" header?

The **From** header contains the creator(s) of the message; the **Sender** header contains the mailbox of the agent responsible for the actual transmission of the message. In many instances, these are one and the same, in which case only the **From** header is used. There may be situations where these are two separate entities; for example, if a secretary were to send a message for another person, the mailbox of the secretary would be in the **Sender** header and the mailbox of the author(s) would appear in the **From** header. If there are two or more authors (and therefore two or more **From** mailboxes), the **Sender** header, with a single mailbox listed, must appear in the message.

### How is this information about the From and Sender headers useful when using ListManager?

If the ListManager site name and the **From** domain match, ListManager includes the **From** header but not the **Sender** header in the digital signature. If the ListManager site name and the **From** domain are different, the **Sender** header is included.

**I sent some mail and then viewed it in Outlook. In the From field, it said "From <address 1> on behalf of <address 2>." Since the email looks like it came from**

**two different places, I'm concerned that recipients will view it suspiciously. What's going on?**

This occurs in Outlook if you have a **From** header and a **Sender** header. Outlook interprets this as "From <Sender header> on behalf of <From header>."

If you are concerned about what your Outlook recipients will see, ensure that your outgoing mail only contains a **From** header, not a **Sender** header.

**How can I ensure that my email only has a From header?**

One solution would be to use an autoresponder. You can learn more about autoresponders [here](#).

You can also [choose a list level setting](#) for DomainKeys that prevents use of a Sender header.

**I sent a message and then opened it in Yahoo and looked at the headers. I'm pretty sure there should be a Sender header, but none is displayed. Why?**

Yahoo does not display the **Sender** header, even when you view all headers.

**How do I use the "Header" field in ListManager?**

The **Header** field is explained in detail on page 10, under the section "Setting Up DomainKeys in ListManager."

**How can I test DomainKeys?**

Send a message to dktest@temporary.com; it is Yahoo's DomainKeys auto responder. It responds with an email that states "Your message has been verified," and displays all the headers in your original message, including the **DomainKeys-Signature** header.

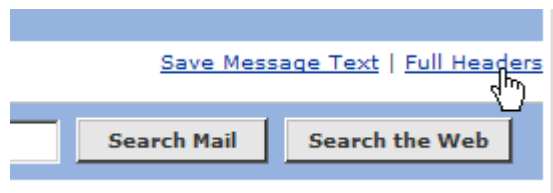
**Does Yahoo require DomainKeys for its Feedback Loop?**

Yes. Contact your Yahoo representative for Feedback Loop applications.

**When I open a typical email, I only see a few of the most basic headers. How do I view all headers in Yahoo / Outlook / Gmail?**

**In Yahoo:**

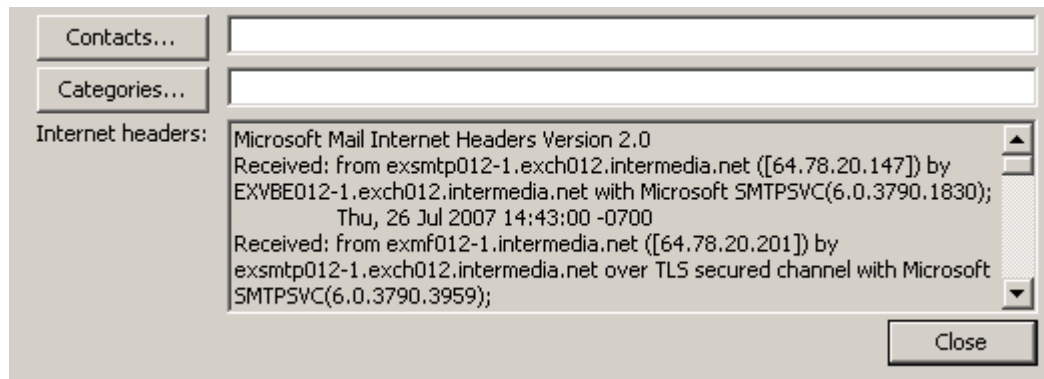
1. Open the email.
2. In the lower right corner of the screen, click **Full Headers**.



**In Outlook:**

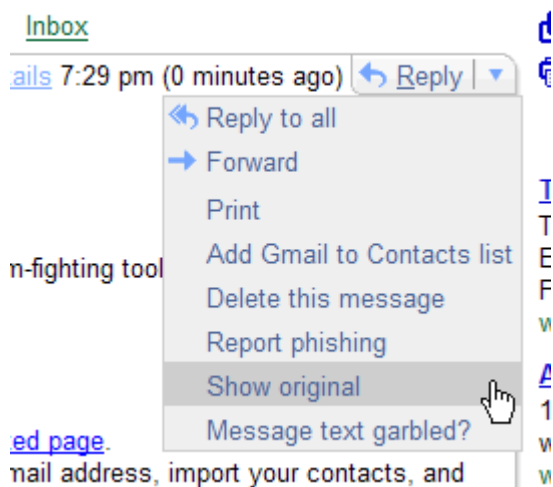
1. Open the email.
2. On the Toolbar, click **View**, and then click **Options**.
3. In the **Message Options** dialog, the headers are displayed in the Internet Headers section.





### In Gmail:

1. Open the email.
2. At the top-right of the message pane, click the down arrow next to **Reply**.
3. Select **Show Original**.



### I'm currently blocked / greylisted / tarpitted by Yahoo. How can I test my DomainKeys without being able to see Yahoo headers?

You can get around this by using a free tool made by the Email Sender & Provider Coalition (ESPC).

<http://senderid.espcalition.org/>

However, note that the ESPC tool may not validate DomainKeys the same way Yahoo does.

### What happens if I send a mailing for which DomainKeys has been set up incorrectly?

See the topic "[Failed Verifications and Warning Messages.](#)"

**The From: field in my mailing contains a merge tag. Will DomainKeys still validate it?**

No; ListManager will not merge and then validate the domain. The mailing will be signed and sent out, but you must verify that the domains match.

[Next: Setting Up and Using DomainKeys in ListManager](#)

## Setting Up and Using DomainKeys

### Overview

Here are the six basic steps involved in setting up and using DomainKeys. The steps are explained in more detail in the following sections.

1. [Generate a public/private key pair](#).
2. Publish the public key in DNS (it is published to your domain's `_domainkey` subdomain TXT record).
3. Copy the private key code you generated and paste it into the **Private Key** box on the DomainKeys page in ListManager. Add **Headers** and **Selectors** on the same page.
4. When you send email, the private key generates a digital signature of the message. (see the description of what digital signatures are on page 3.)
5. The DomainKeys-enabled receiving server extracts the digital signature and claimed From: or Sender: domain from the headers.
6. The receiving server fetches the public key from DNS and checks it against the private key. If it's a match, this proves that the claimed From: or Sender: domain is accurate and the headers and content were not altered. If the signature fails to verify, the email can be dropped, flagged or quarantined.

### Details

To perform the following actions for Windows or Linux, you must have [OpenSSL](#) installed on your system.

#### Generating the Private Key -- Windows

**In Windows:**

1. Open the Command Prompt (**Start > Programs > Accessories > Command Prompt**).
2. Navigate to the following folder:  
C:\Program Files\ListManager\tclweb\bin\certs
3. Type the following:

```
openssl genrsa -out rsa.private 512
```

4. Press **ENTER**. The private key is generated and saved in a file named "rsa.private" located in the same folder.

**NOTE** The number "512" in the above command indicates the size of the private key. You can choose one of five sizes: 512, 758, 1024, 1536 or 2048 (these numbers represent bytes). The larger sizes offer greater security, but this is offset by a penalty in CPU performance. We recommend staying with 512.

## Generating the Public Key -- Windows

1. At the command prompt, type the following:

```
openssl rsa -in rsa.private -out rsa.public -pubout -  
outform PEM
```

2. Press **ENTER**. The public key is saved in a file named **rsa.public** located in the same folder.

## Generating the Private Key -- Linux

1. Open the Terminal.
2. Navigate to the folder with the ListManager directory.
3. Type the following:

```
openssl genrsa -out rsa.private 512
```

4. Press **ENTER**. The private key is generated and saved in a file named "rsa.private" located in the same folder.

## Generating the Public Key -- Linux

1. Open the Terminal.
2. Type the following:

```
openssl rsa -in rsa.private -out rsa.public -pubout -  
outform PEM
```

2. Press **ENTER**. The public key is saved in a file named **rsa.public** located in the same folder.

## Creating and Publishing the Domain TXT Records

Next, you must create the Domain TXT Records which you will publish to DNS. Use your favorite text editor to create the records described below. You will then copy the text from the editor into whichever program you use to publish to DNS.

### Creating the DomainKeys Policy Record

The first type of record you need to create is called your DomainKeys policy record. The policy record is stored at `_domainkey.domainname.com`. Here is an example record:

```
_domainkey IN TXT "t=y; o=~; r=postmaster@yourdomain.com"
```

Here is a list of the possible tags, and their meanings:

`o` — Outbound Signing policy ('-' means that this domain signs all email, '~' is the default and means that this domain may sign some email with DomainKeys).

`r` — A reporting email address. If present, this defines the email address where invalid verification results are reported. This tag is primarily intended for early implementors—the content and frequency of the reports will be defined in a separate document.

`t` — testing mode ('y' means that this domain is testing DomainKeys so unsigned and unverifiable email should not be treated differently from verified email. Recipient systems may wish to track testing mode results to assist the sender.)

`n` — Notes that may be of interest to a human. No interpretation is made by any program.

Yahoo's Policy as of this writing is:

```
;; ANSWER SECTION:
_domainkey.yahoo.com. 7200 IN TXT "t=y\; o=~\;
n=http://antispam.yahoo.com/domainkeys"
```

### Creating the DomainKeys selector record

You can only set up one DomainKeys policy record per domain, but you can set up multiple selector records. The selector record holds your public key. You can set up multiple selectors to be used on different servers if you like, or you can use one selector for all your outgoing email. You can also create a selector that only works for one specific email address. Here is an example selector record:

```
2006._domainkey.example.com IN TXT "k=rsa;
p=MFwwDQYJKoZIhvcNAQEBBQADSwAwSAJBANtlhE1vNuUrz
NPKjYblYUn0kBLgRzUbnZ9JCJe4w5/ocxIoeewlp328b20S2tETjIa4krj80J11J
FT8VhAHLmcCAwEAAQ=="
```

The selector record consists of the following three sections:

1. **Selector:** In this example, 2006 is the selector. It must always be followed by a dot, then an underscore, then the word "domainkey," then another dot, and then the domain name.

Example:

```
2006._domainkey.example.com
```

2. **Record identifier:** "IN TXT" is the record identifier, and it is the same for every record.
3. **Tag=value pairs:** Note that this section is enclosed in quotation marks. There is only one tag=value pair that **must** be included—the one that lists the public key.

However, there are several other tag=value pairs that are optional. The example above contains this optional pair:

```
k=rsa
```

RSA is an algorithm for public-key encryption. This tag=value pair is the same for every record. To learn about other tag=value pairs and why you might want to include them, go to:

<http://tools.ietf.org/html/rfc4870>

and review section 3.2.3., "Public key Representation in the DNS."

The **required** tag=value pair, again, is the one that contains the public key:

```
p=MFwwDQYJKoZIhvcNAQEBBQADSwAwSAJBANt1hE1vNuUrz  
NPKjYblYUn0kBLgRzUbnZ9JCJe4w5/ocxIoeewlp328b20S2tETjIa4krj8OJ1lJ  
FT8VhAHLmcCAwEAAQ==
```

To insert the public key:

- a. Open the file **rsa.public** that you generated in the section above called "Generate the Public Key."
- b. Copy the string of characters starting with the first character after "-----BEGIN PUBLIC KEY-----" and ending with the last character before "-----END PUBLIC KEY-----."
- c. Type **p=**and then paste the string.
- d. Type the closing quotation mark for the tag=value pair section. You may want to double-check to ensure that there is an opening quotation mark before the first tag=value pair (see placement of the quotation marks in the the example at the beginning of this section).

## More About Selectors

The selector is an arbitrary name you create when you publish your public key to DNS. It can be any string that is considered legal in the DNS namespace and email headers; it must not contain a semicolon. When you generate a new public/private key combination, you must choose a new selector. It is a good idea to do this periodically for increased security.

You can have more than one selector active in DNS at one time. Why would you want to do this? Here's one example: let's say it's December 2006; you have a Domain TXT record (public key) published to DNS with a "2006" selector, and your outgoing email is being signed with a 2006 selector (private key). The public/private key combination is matching, and your recipients are getting their mail verified.

The new year rolls around, and you decide you want to change the public/private key pair to "2007" for security reasons. There will probably be a period during which mail that was sent in 2006 is being opened in 2007. If you only have a "2007" TXT Record in DNS, that email will fail verification. You can leave the "2006" TXT Record in DNS for a transition period, and remove it when you feel confident that all 2006 email has been opened.

## Publishing the Domain TXT Record to DNS

### Publishing to DNS -- Windows

1. Run Windows DNS.
2. Expand the folder for the domain you want to add DomainKeys to.
3. Right-click the folder, and then select **Other New Records**.
4. In the **Resource Record Type** dialog, select **TXT**.
5. Click **Create Record**.
6. In the **Record Name** field, type the selector followed by a dot, and then `_domainkey`.  
Example:

```
2006._domainkey
```

7. In the **Text** field, paste the full set of tag/value pairs without quotation marks.  
Example:

```
k=rsa; p=MFwwDQYJKoZIhvcNAQEBBQADSwAwSAJBANt1hE1vNuUrz  
NPKjYblYUn0kBLgRzUbnZ9JCJe4w5/ocxIoeewlp328b20S2tETjIa4krj8OJ11J  
FT8VhAHLmcCAwEAAQ==
```

8. Click **OK**.

### Publishing to DNS -- Linux

1. Open the zone file in the editor of your choice.
2. Paste your full public key into the zone file.

#### NOTES

- You can paste the public key anywhere in the zone file.
- The public key cannot have any line breaks. Make sure it is one continuous string of text.

[Learn more about DomainKey Distribution Options.](#)

## Setting up DomainKeys in ListManager

DomainKeys is set up in ListManager at both the Site and List level. The Selector and Private Key must be populated at the Site level for any DomainKeys activity to take place. If these fields are not populated, the List level setting for DomainKeys will be disabled. If the List level settings for DomainKeys are set and then disabled, the List will continue to attempt to use DomainKeys signing even with invalid or missing Selectors or Private Keys.

All Lists default to "Use the site setting for this list" for their DomainKeys setting. This means that as soon as the Site level DomainKeys settings are in place, every list under that Site will begin to use DomainKeys signing if the Site "DomainKey Signatures" is set to **Yes**. If it is set to **No**, none of the Lists will use DomainKeys signing until their DomainKeys setting is changed.

### Choosing Site Level Settings

1. Open ListManager.
2. In the left Navigation bar, go to **Utilities : Administration : Sites**.
3. Under **Site Name**, click the site you want.

4. Click the **DomainKeys** tab.
5. **Next to DomainKey Signatures, choose Yes or No.**
  - If set to **Yes**, every List within that Site will start to use DomainKeys signing immediately since the default is to use the Site Setting for this field. Each List can be changed to use this setting in the Site or ignore it using the List Settings below.
  - If set to **No**, every List within that Site will have to independently turn on DomainKeys using the List Settings below.
6. In the **Headers** box, type the header(s) you want (if any). If you type two or more, separate them with colons. To learn more, see the section "Using the Header Field" below.
7. In the **Selector** box, enter the selector you used when you created the Domain TXT Record.
8. In the **Private Key** box, insert the private key you generated earlier:
  - a. Open the file **rsa.private** that you generated in the section above called "Generating the Private Key."
  - b. Copy the full string of characters found in the file.
  - c. Paste the string into the **Private Key** box in ListManager.
9. Click **Save**.

### Choosing List Level Settings

You can enable DomainKeys at the list level, and specify whether this setting acts in conjunction with the site level setting or independent of it.

1. In the left Navigation bar, go to **Utilities : List Settings: Basic Information**.
2. Click the **Enable Features** tab.
3. Next to **Enable DomainKey signatures**, there is a box with a down arrow. Click the arrow to view the available options:

#### Use the site setting for this list:

Uses DomainKeys, or not, depending on the "yes" or "no" setting you chose in the Utilities > Administration > Sites > New/Edit Site > DomainKeys tab (i.e., the site level setting).

**Use the site setting for this list, but do not add Sender Header if signing** : Uses the settings you chose in the DomainKeys tab, but does not include a Sender heading regardless of site/domain matching (see the note below).

**Yes, enable for this list**: Uses DomainKeys regardless of the the "yes" or "no" setting you chose in the Utilities > Administration > Sites > New/Edit Site > DomainKeys tab (i.e., the site level setting).

**Yes, enable for this list, but do not add Sender Header if signing**: Uses DomainKeys regardless of the the "yes" or "no" setting you chose in the Utilities > Administration > Sites > New/Edit Site > DomainKeys tab. Does not include a Sender heading regardless of site/domain matching (see the note below).

**No, disable for this list** : Does not use DomainKeys regardless of the "yes" or "no" setting you chose in the Utilities > Administration > Sites > New/Edit Site > DomainKeys tab.

**NOTE re Site/Domain Matching**: If the ListManager site name and the From domain match, ListManager includes the From header but not the Sender header in the digital signature. If the ListManager site name and the From domain are different, the Sender header is included.

4. Click **Save**.

## Using the Header Field

The **Header** field lets you assign specific headers to be included in the digital signature. Why would you want to do this? There is evidence to suggest that some mail servers and relay systems modify email in transit. If this occurs, it is possible that the email could fail verification. When you include headers in the Header field, they cannot be altered. This provides an extra level of security.

However, the risk of alteration is low and we recommend that you keep things simple by leaving this field blank. When you do, ListManager automatically includes a single header: the **Sender** header, if present; otherwise, the **From** header. This approach seems to work fine for most of our users. Some users choose to include crucial pieces of information that their systems rely on for further processing, such as the **Message-ID** or a marketing campaign ID code. When you assign headers, ListManager still automatically includes the **Sender** or **From** header.

The contents of the **Header** field in a received email can be seen in the **DomainKey-Signature** header as the "h" tag/value pair. In the example below, this is displayed as:

```
h=Date:Message-ID:From:To:Subject:MIME-Version:Reply-To:Content-type;
```

<b>DomainKey-Signature:</b>	a=rsa-sha1; q=dns; c=noofs; s=200505; d=one.yahoo-email.com; b=RkoET3E1CKIZl5ezKnbwHbo8REbQPlkw'+0Rf6ssykfWhg/PcztgW39mn4eEV2VYiOzcdOncVuOaDPVoxE h=Date:Message-ID:From:To:Subject:MIME-Version:Reply-To:Content-type;
-----------------------------	---

## Failed Verifications and Warning Messages

While sending a mailing, if it is marked to be signed using a DomainKey, then ListManager will use the domain of the From or Sender Header and add this to the selector defined on the DomainKeys tab of the Site to request a public key. ListManager then attempts to match the retrieved public key to the private key on the DomainKeys tab of the Site.

- If no public key can be retrieved, or if it cannot be matched to the private key in ListManager, then DomainKey signing cannot take place. ListManager will issue a failure message.

- If the From has a merge tag in it, then ListManager cannot verify the DomainKey before sending the mailing. In this case, ListManager will send the mailing with DomainKey signing but will issue a warning message.

When ListManager generates these warning or failure messages, they are logged in the Mailing transact log and the debug log. An email is also sent to any List Administrators on that list.

Some possible warning messages are:



.... "Mailing Id: 192 NOT SIGNING message with Domainkey signature header. DNS permanent failure for LM\_DK\_test512.\_domainkey.2k3.lyris.com" In this case, there is matching public key in the 2k3.lyris.com DNS for the private key set up in the Site

.... "Mailing Id: 199 NOT SIGNING message with Domainkey signature header. LyrisDK::NetValidate: No DNS TXT record found for 'LM\_DK\_test512.\_domainkey.yahoo.com'" In this case, there is matching public key in the yahoo.com DNS for the private key set up in the Site

.... "Mailing Id: 116 SIGNING message with Domainkey signature header. Can not verify PUBLIC KEY because the From: contains a merge tag." In this case, it was impossible to tell if the From had a valid domain, since it contained a merge tag. LM will assume that the domain is valid and will send it out DK signed

....Mailing Id: 255 NOT SIGNING message with Domainkey signature header. LyrisDK::NetValidate: No DNS TXT record found for '\_domainkey.lyris.com' In this case, the Selector was missing in the Site DK definition

....Mailing Id: 259 NOT SIGNING message with Domainkey signature header. Private key is bad. In this case, the Private Key is missing or bad in the Site DK definition

# ListManager Programmer's Guide

## Programmer's Guide

---

### Introduction

[Introduction to Programming and ListManager](#)  
[Direct Database Access with ListManager](#)

### Common SQL Queries

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### Application Programming Interface

[Introduction to the API](#)

### ListManager Tables

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## Making an Editable Region via Hand-Coding

---

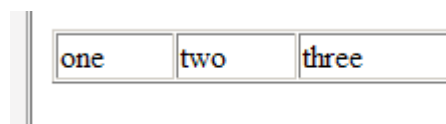
In the [HTML Editor](#), you can add HTML to make certain tags editable regions. The tags supported for this feature are:

paragraph `<p>`  
image `<img>`  
div `<div>`  
headings 1 through 6 `<h1>`, `<h2>`, etc.

### To edit code in the HTML Editor

Click the **Disable HTML Editor** button, or the **Source** button located in the toolbar.

One common use for this feature is making table cells editable regions. For example, let's say you have the following table:



one	two	three
-----	-----	-------

To make the cell containing the word "two" editable, change the code the for that cell as indicated below in yellow:

```
<table cellspacing="1" cellpadding="1" width="200" border="1">
<tbody>
<tr>
<td>one</td>
<td><!-- :field: type="paragraph" wrap_element="P" wrap_tag="DIV" name="edit_me" -->
<div id="edit_me" type="paragraph">two</div>
<!-- /:field: type="paragraph" --></td>
<td>three</td>
</tr>
</tbody>
</table>
```

**NOTE** In this example, the name attribute in the <field> tag and the id attribute in the <div> are both "edit\_me." You can use any name you want, as long as they are identical.

## Introduction

### Introduction to Programming and ListManager

---

ListManager is a powerful, fast, and easily extensible tool to help manage your email distribution. For programmers, ListManager has a number of methods to customize and manipulate the behavior of the product.

ListManager uses powerful relational databases, such as Microsoft SQL Server or Oracle to store its data. You can view the [table structure](#) used by ListManager and write whatever extensions or custom reports that meet your needs. You can directly insert data, such as new members, in whatever programming language or environment that best meets your company's needs.

Beyond the exposed database design, the ListManager environment can be altered programmatically in a number of ways. There are pre-defined "hooks" in the program to run scripts at certain key times, and certain functionality is designed to be flexible, such as the automatic phrases content checks.

Lyris ListManager is the only product on the market that allows a programmer to create scripts that can be run to customize a message for each recipient "on the fly." With this ability a programmer can create a script using the Tcl scripting language that customizes the contents of a message, one time, if desired, or to make it unique for each recipient. Ad banners can be rotated, flight schedules inserted; you can accomplish nearly anything that you can imagine.

The source code for key portions of the included web interface are provided with the product at <http://yourlistmanagerserver/docs/api/index.html>. This allows a programmer to customize the interface to make it fit within company look-and-feel standards or to augment the behavior for a custom subscribe form, for example.

ListManager has an exposed Application Programming Interface (API) called TclPort for web programmers and others who are interested in augmenting or changing the

behavior of ListManager. Using TclPort, a programmer can create powerful Tcl scripts that can be run on the ListManager server, manipulating data in the SQL database or in program variables.

ListManager also has a SOAP-based API which may be invoked from any language that has SOAP support. Examples of ListManager's functions in different languages are available in your ListManager's soap directory:

<http://yourlistmanagerurl/soap>

Or, you may In the left Navigation bar, click Utilities: Other: Programming API.

[http://www.lyris.com/lm\\_api/1.5.2](http://www.lyris.com/lm_api/1.5.2) Learn more about the SOAP-based API

## Direct Database File Access and ListManager

---

It is possible to directly manipulate the ListManager database. Much of the data in the database is related to other data, so changes to one field might require a change to another field in another table. Making modifications without understanding the data dependencies and field definitions can lead to unexpected results. It is highly recommended that users test their scripts on a private test list before running them on public lists.

Changing the data in tables while ListManager is running is a little dangerous but should generally work. You need to understand the database design well enough to know if changes made to the tables will have an immediate effect or not. In some cases, ListManager is regularly polling a table for changes, but in other cases, it won't pick up a change until the system is restarted.

Programmers should feel free to work with the [members\\_](#) table. Many companies want to be able to add or change the membership information in the members\_ table dynamically, and doing so generally should not cause problems. Programmers are encouraged to import their membership data directly into the database server using the native tools provided by the database. Using these tools results in import speeds of millions of records per hour, which is faster than any other method available through ListManager.

While ListManager is expecting users to add columns to the members\_ table, it will very likely cause errors if existing columns/indexes are changed, or the schema is modified in other tables. Developers interested in making demographic data available for mail merging or for the purpose of determining whom to send mail are encouraged to add columns to the members\_ table or to a new table. ListManager has the easy ability to pull data from user-provided tables during the mail merge process.

All tables are designed by Lyris for the purpose of making ListManager as fast and powerful as it is today. As the technology demands changes, any of the tables used by ListManager today may be changed in subsequent versions of ListManager, so application programmers need to keep this in mind. Lyris offers no guarantees that the schema used for one version of ListManager will be the same for another version.

# Common SQL Queries

## About the Queries

---

This section provides some common queries that could be useful for programmers, either as starting points for more advanced queries, or as they exist today integrated into web pages or other places where this data could be useful. There are many more complicated queries that could generate reports or answer more specific questions, but these queries are designed to be fairly simple and generic queries useful by a large number of clients.

### Common SQL Queries:

[Add a member](#)

[How many users on list xxx](#)

## Adding a member

---

The [members\\_](#) table stores a row for each list that the member has joined, so the same email address will appear multiple times in this table. Most columns have defaults, so the minimum number of columns can be provided for an insert. You **must** split the user name and domain portion of the email address prior to inserting a row into this table. The `UserNameLC_` field stores the user name in lower case, and the domain should always be in lower case. The `EmailAddr_` field stores the email address in mixed cases, and **must** be the same as the `UserNameLC_ + @ + Domain_`, ignoring case, or ListManager will not work properly.

Records can be inserted into the `members_` table with a 'needs-' status, such as `needs-confirm`. ListManager regularly polls new records into the `members_` table to see if any of the new members need a hello, confirm, or goodbye document sent to them. The check is only done regularly for new members, so updating an existing member to 'needs-hello', for example, will not cause an immediate document send. Instead, during a nightly check this status change will be noticed and the document sent.

Members can be added or marked unsubscribed at any time in ListManager. Postings which have been processed to the point that sending has started will not reflect changes made in subscriptions after that point. So if a posting is created to ten people and it is processed to become an outmail record, when user number eleven is added to the list he/she is not automatically sent the posting, even if the job has not yet completed sending to all recipients.

The `MemberID_` field is an auto-numbering field, so should never be provided for insert statements.

```
insert into members_ ( EmailAddr_, UserNameLC_, Domain_, List_, MemberType_ )
values ( 'GeorgeBush@example.com', 'georgebush', 'example.com', 'terrorist-watch-
news', 'needs-confirm' )
```

## How many users are on list xxx

To determine how many users are subscribed to a particular list, simply query the [members\\_](#) table:

```
select count(*) from members_ where list_ = 'jazztalk' and MemberType_ = 'normal'
```

If you want to know the breakdown of members by type, on a list:

```
select MemberType_, count(*) from members_ where list_ = 'jazztalk' group by MemberType_
```

## Application Programming Interface

### Introduction to the API

---

A programmer has several choices about how to programmatically solve problems with Lyris ListManager. One technology may be appropriate for one type of customization, where another technology may work better for a different customization. Here are some of the choices:

#### **SOAP-Based API**

[Open the SOAP-Based API Online Manual.](#)

#### **Mail Commands**

Many powerful commands are available as email commands. Members can be subscribed, unsubscribed, and their setting altered through email commands. Data about the membership and other reports can all be requested via email. If your need can be filled with these simple commands you may want to create emails to ListManager rather than using one of the more complicated programming options.

#### **Direct Database Access**

All the tables in Lyris ListManager are accessible through the SQL language. Data may be inserted, deleted, or modified in these tables directly. For some tasks, such as member creation, it may be easiest to use the programming language and environment you are comfortable with to access the database server using SQL to insert members. However, if you are uncertain about the use of the data or the relationship of the data to program functionality it is probably best to avoid making any direct database modifications.

#### **Lyris Command Protocol (LCP)**

The LCP interface has been removed and is no longer available. Application programmers should use direct SQL or email commands.

# ListManager Tables

## The ListManager Tables

---

All the ListManager tables are described in the following sections. Tables are broken down by their general function, to help with organization.

### Administrators

[people](#)  
[lyrUIPrefs](#)

### Automatic actions

[respond](#)  
[phrases](#)

### Configuration

[domainconnectionlimits](#)  
[dnsbypass](#)  
[bannedmembers](#)  
[lyrClusterMutexLock](#)  
[lyrConfigClusterSettings](#)  
[lyrClusterState](#)  
[lyrConfigIPAddr](#)  
[lyrConfigNodeSettings](#)  
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### Content

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[lyrImageFolders](#)  
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[messagetypes](#)  
[docs](#)  
[doctypes](#)  
[listdocs](#)  
[sitedocs](#)  
[docparts](#)  
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### Clicktracking

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[clickstreamdata](#)  
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### **Charting**

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### **Deliverability**

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### **Logging**

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### **Mail Streams**

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### **Mail Queue**

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### **Member Information**

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### **Message Archives**

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### **Permission Groups**



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**Internationalization**  
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**Referrals**  
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**Scheduled Tasks**  
[lyrTaskScheduler](#)  
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**Sessions**  
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**Split Tests**  
[lyrSplitTests](#)  
[lyrSplitTestMetricsRank](#)  
[lyrSplitTestParts](#)

**Surveys**  
[lyrSurveyResponseAnswers](#)  
[lyrSurveyResponse](#)  
[lyrSurveyQuestions](#)  
[lyrSurveyAnswers](#)  
[lyrSurveyAnswerCollections](#)

**Web Documents**  
[lyrWebDocs](#)  
[lyrLookupWebDocTypes](#)

**EmailAdvisor**  
\* [lyrPiperMail](#)  
[lyrPiperSeeds](#)

\* lyrPiperMail tables are generally defined using Microsoft SQL Server keywords, although these tables work across all ListManager supported databases. The type BOOL listed in this document maps to a char(1) with a check constraint in all platforms. Here is a mapping of MSSQL keywords and their equivalent for other vendors, where the same type is not used for all vendors:

<b>MSSQL column</b>	<b>MSSQL description</b>	<b>Used for Oracle</b>	<b>Oracle description</b>
tinyint	A one byte value	int	A four byte value
smallint	A two byte value	int	A four byte value

int	A four byte value	int	A four byte value
bigint	An eight byte value	numeric(22, 0)	Up to 22 digits of precision
numeric	A numeric value	numeric	A numeric value
smalldatetime	Time and date with accuracy to one minute	date	An 8-byte value with second precision
datetime	Time and date with subsecond accuracy	date	An 8-byte value with second precision
text	An unbound character column	clob	An unbound character column

Microsoft SQL Server supports a data column modifier called an "Identity" which can be added to numeric fields. This is an auto-numbering field that automatically populates the next incrementing value. Oracle implements this with a separate "sequence" table. For ListManager, a sequence table is created with the base table name and "\_seq", so "docs\_seq", for example. With Oracle, the next value is obtained from this sequence table via a 'before' trigger.

Previous versions of table and column names all ended with a trailing underscore, like 'lists\_'. This was the legacy method to help avoid naming conflicts with other tables or objects in the database. Future versions of ListManager will drop the trailing underscores and will prefix all ListManager tables with 'lyr', like 'lyrWebDocs'.

Additional tables may be added to the database/tablespace holding the ListManager tables. As long as the names do not conflict there should be no problem with this.

ListManager will create the indexes it needs. Most tables have primary keys, and all tables that will benefit from indexes have them. Tables which have unique indexes on them rely on the uniqueness of the index, so they shouldn't be changed. Considerable effort is put towards finding the best mix of indexes for the different vendors and the different common usages of ListManager. While it may be possible to optimize the performance for reads for some tables by adding additional indexes, write performance will suffer. Users are free to add indexes if desired, but any changes to the structure of the tables may make future upgrades impossible.

The tables involved in mail sending (the mail queue) are the most active, for the common use of ListManager. These include lyrActiveRecips, lyrCompletedRecips, and inmail\_ and outmail\_. If message seaching is enabled the [messages\\_](#) table will store a copy of the message and will therefore grow and be somewhat active. Along with messages\_, there are two tables that enable archives to be searched: [wordmessage\\_](#) and [uniquewords\\_](#). The [members\\_](#) table is also one of the largest tables in ListManager.

[Future direction](#)

## Future Direction

---

The database tables have changed some as the product has grown from supporting only FoxPro to supporting standard client-server databases such as Microsoft SQL

Server and Oracle. ListManager has some new tables and table changes. These type of changes are likely to continue.

It is likely that ListManager will continue to migrate the database design towards a more client-server architecture. The number of tables should increase, and the "width" of some tables will be reduced. More lookup and referential tables will be used to increase the speed and reliability of the design. In future versions, all text blobs that store one-to-many results should be replaced with table lookups.

In ListManager 7.8 the outgoing portion of the database mail queue was redesigned. To support clustering, the config\_ table, which contained server configuration information, was divided into four tables: lyrConfigClusterSettings, lyrConfigIPAdrs, lyrConfigNodeSettings, and lyrRelayHosts.

It should be expected that many other tables will be altered in coming versions of ListManager.

The basic functionality of ListManager should not change, but the way in which some of the data is stored will change. If you write custom SQL statements to the current ListManager design you need to be prepared to change these as new versions of the software are released. Hopefully these changes will be simple, such as making a single-table lookup into a multi-table lookup using a join, but it could be more complicated.

For more information on ListManager tables, see [About ListManager tables](#).

## Administrators

### Summary of the "people\_" fields in ListManager

---

The people\_ table holds server and site administrators, as well as other significant 'people' to the server operation. A person can be listed in this table and not be a server or site admin because they may be a contact person for a list. The sites that an admin has rights over is listed as vertical bar (|) separated list in the WhatSites\_ column. If a site admin needs to support more sites than can fit into this column a second people\_ table entry should be created, or the person should be elevated to a server admin. This design is likely to change in the future.

Primary key: Name\_

Field Name	Description	Version Added
Comment_	Comments about this person (text, NULL)	
EnableWYSIWYG_	Whether this admin should have the HTML editor enabled by default. (bool, 'T' is default)	Added in 8.8
EmailAddr_	Person's email address (varchar(100), NULL)	
FaxNum_	Person's fax number (varchar(50), NULL)	
Name_	Unique name of the person (varchar(50), NOT NULL)	

Password_	Password for this person. The password is encrypted. (not needed if not admin) (varchar(50), NULL)
PeopleID_	A unique identifier for each person
PostAddr_	Person's postal address (varchar(238), NULL)
ServerAdm_	Is this person a server admin? (bool)
Site_	Name of site this person belongs to. May be 'all', indicating that the sites are stored in WhatSites_. (varchar(50), NOT NULL)
SiteAdmin_	Is this person a site administrator? (bool)
TelNum_	Person's telephone number (varchar(50), NULL)
WhatSites_	What sites can this person administer. Site names in a string separated by   (for site admin only) (varchar(238), NULL)

## IyrUIPrefs

---

This table contains information about individual administrators' interface preferences. A default row will exist for the "admin" account. A new row will be created for all other administrators.

Key: PrefID

Field Name	Description	Version Added
PrefID	Unique ID for this record. (int(4), NOT NULL)	
EmailAddr	The email address of the administrator for this record. (varchar(100), NOT NULL)	
HomeTab	Which home tab this user prefers.(varchar(50), NULL)	
Shortcuts	URLs that should appear as shortcuts on the overview tab. Stored as comma-separated list of shortcuts as "URL,Name,URL,Name,URL,Name"(text, NULL)	
TabList	Stores comma-separated list of the names of tabs the user wants to see as "Name,Name,Name,Name".(text, NULL)	

## Automatic actions

### Summary of the "respond\_" fields in ListManager

---

The respond\_ table holds information for autoresponders - addresses that, when mailed to, automatically send back an email document.

Primary key: RespondID\_

Field Name	Description	Version Added
DocID_	What document should be mailed in response to getting email at this address (varchar(200), NOT NULL)	Changed column in 7.8.

EmailAddr_	Email address that should produce an automatic response message, such as salesinfo@acme.com (varchar(50), NOT NULL)	
InMailType_	(int, NOT NULL)	10.0
List_	The list that this auto-responder belongs to (NULL if belongs to site or server) (varchar(60), NULL)	
Notify_	Email addresses to notify when this responder is requested (text, NULL)	
PgmAfter_	Program to execute after the action of an auto-responder (text, NULL)	
PgmBefore_	Program to execute before the action of an auto-responder (Text, NULL)	
RespondID_	Unique ID for this responder (int, Identity, NOT NULL)	
Site_	What Site does this apply to? This can be the name of a site, the name of a list (in the form of "list \$listname"), or "all" for server-level responders. (varchar(70), NOT NULL)	
TclExtension_	TCL extension to run for this responder. (varchar(60), NULL). <a href="#">Learn more about autoresponders.</a>	Added in 8.1.

## Summary of the "phrases\_" fields in ListManager

The phrases\_ table holds "phrases" words that should trigger a specific action. You define the phrase, where in the message to search, and what to do when the phrase is found.

Primary key: PhraseID\_

Field Name	Description	Version Added
AppliesTo_	What fields does this apply to: all, body, subject, from, header, subject-body, etc. (varchar(30), NOT NULL)	
Context_	In what context does this apply: <i>\$listname</i> , "all lists", "all sites", or "listmanager@". This attribute should work in conjunction with "Site" (below) to locate the phrase at the correct hierarchical level (varchar(60), NOT NULL)	
DocID_	What document should be mailed/displayed in response to seeing this phrase (varchar(200), NOT NULL)	Changed column in 7.8.
Notify_	Email addresses to notify when this responder is requested (text, NULL)	
PgmAfter_	Program to execute after the action of a match phrase (text, NULL)	
PgmBefore_	Program to execute before the action of a match phrase (text, NULL)	
Phrase_	The phrase words to search for. If more than one, separated by a carriage return (text, NULL)	
PhraseID_	Unique ID for this phrase (int, Identity, NOT NULL)	
Reject_	Whether to accept or reject the message in response to seeing this phrase. (bool, NOT NULL).	Added in 7.8.
Replace_	Replace the matched match phrase text with this text (text, NULL)	
Site_	Name of site this applies to. This field can be a sitename, a listname (in the form of "list <i>\$listname</i> "), or "all" to designate a	

server-level phrase (varchar(70), NOT NULL)

## Configuration

### Summary of "domainconnectionlimits\_" fields for ListManager

This table stores any domains that should have a different number of connections than is the default for the server. This controls the maximum number of connections allowed to a given domain's IP address. Some domains will not allow many connections to their mail servers, and this allows ListManager to be configured to not try and open so many connections. By default ListManager will open up to ten connections per IP address. Opening more connections often causes too much load on the receiving mail server, and may kick off "denial-of-service" attack warnings, which will cause the ListManager server to get blocked/banned. It is STRONGLY suggested that this setting not be increased beyond ten, but in fact be used to limit ListManager for those servers that won't even allow ten connections.

Primary key: Domain\_

Field Name	Description	Version Added
ConnPerHour_	Specifies the maximum number of TCP connections the mail sender is allowed to establish to a given IP per hour	9.2
Domain_	The domain that should be limited in the number of connections allowed. The domain should be in lower-case. (varchar(250), NOT NULL)	
MaxMsgPerConn_	Specifies the maximum number of email messages allowed to be sent per TCP connection.	9.2
ConnectionLimit_	The number of connections to allow, per IP address, to this domain. (smallint, NOT NULL)	

### Summary of "dnsbypass\_" fields for ListManager

This table allows users to configure explicit servers to provide DNS information. This is normally used when ListManager is behind a firewall and there are mail servers also behind the firewall that should be connected to directly, without going out the firewall and coming back in. The mail server may not have a publicly known address, so this table provides a location to tell ListManager about an internal DNS server that knows about the internal-only domains.

This table also has the default root servers. If you know that your physical location is best served by a subset of these root servers the additional entries can be removed. These root servers are only used to provide a starting place if no other information is known about the domain. Removing all the root servers will cause ListManager to be

unable to send mail. Providing only local DNS servers as the root server may or may not allow ListManager to function, depending on the configuration of that DNS server, but will cause it to perform more slowly. Subsequent requests for data, for example from the GTLD's, will not be asked of the local DNS server, unless these are also bypassed.

Primary key: UniqueID\_

Field Name	Description	Version Added
UniqueID_	An auto-numbering field to provide a unique ID for this row. (int, NOT NULL)	
Domain_	The domain that this bypass information applies to. The domain should be in lower-case. (varchar(200), NOT NULL)	
HostName_	A name for the host. (varchar(200), NOT NULL)	
Type_	Is this a MX (15) or an A (2) record type? (tinyint, NOT NULL)	
Address_	The address of the DNS server, in dot-pair string notation. (ex: 222.11.22.11) (varchar(15), NOT NULL)	

## Summary of the "bannedmembers\_" fields in ListManager

---

The list of banned members for this server. Bans can be at a server, site, or list level, and may ban members in a variety of ways - with a complete email address, by banning all members at a given domain, or accepting only named users.

Primary key: UniqueID\_

Field Name	Description	Version Added
UniqueID_	Auto-numbering field to uniquely identify this row. (int, NOT NULL)	
Created_	The time and date this entry was first created. (date, NULL)	
Domain_	The domain portion of the email address. (varchar (250), NULL )	
ListID_	The list that this ban is associated with. NULL for a site or server ban. (int, NULL)	
SiteID_	The site that this ban is associated with. NULL for a list or server ban. (int, NULL)	
StopLogic_	Logic for processing the ban information. A = always accept this user, C = conditionally accept this user, R = reject this user. (char(1) NOT NULL)	
UserNameLC_	The user name for this ban, if any, in lower case. (varchar (100) NULL)	

## IyrClusterMutexLock

---

This table is used for cluster-wide locking when performing ODBC synchronization.

Primary Key: MutexName

Field Name	Description	Version Added
ExpirationTime	Time at which the lock will automatically expire if an extension is not made by the locking node. Extensions are made periodically by updating this field. (datetime, NOT NULL)	Added in 9.0
MutexName	The name of this lock. (varchar(250), NOT NULL).	Added in 8.8
NodeID	NodeID from LyrConfigNodeSettings. (int, NOT NULL)	Added in 8.8
LockTime	The time this node is to be locked. (datetime, NOT NULL)	Added in 8.8

## IyrConfigClusterSettings

---

These settings are used by all machines in a ListManager cluster.

Field Name	Description	Version Added
AdminEmail	The email address of the administrator responsible for this server. (varchar(50), NULL)	
AllowCsvUpdateNonNormal	Specifies whether ListManager will allow CSV imports to update non-normal members (e.g., held or unsubscribed) to be normal. (bool)	
AllowNntp	Specifies whether ListManager will allow connections via NNTP. (bool)	
BanCacheTimeoutMinutes	How many minutes to cache the bannedmembers_ table. "0" means don't cache. (int, '0')	Added in 8.8
BannedFrom	Bans all email from a particular address. ListManager will terminate connections with these address(es) in the SMTP MAIL FROM:.(text(16), NULL)	
BillingCustomerTypes	(varchar(255), NULL)	
BillingEmail	The address used as the default From: for bills. (varchar(100), NULL)	
BillingName	(varchar(100), NULL)	
BillingTestEmail	The email address billing tests should be sent to. (varchar(100), NULL)	Added in 8.8
BindDNSPort	The IP address ListManager should bind to for the purposes of DNS lookups. (smallint(2), NULL)	
CheckCommandMailForSpam	char: 1 nullable: 0	
CheckJoinLeaveMailForSpam	char: 1 nullable: 0	



CheckJoinMailForSpam	Whether ListManager should check incoming email subscriptions for spam. (bool)	
CreateLogEntries	Whether ListManager should log mailings sent to lists. (bool)	
ComplaintBanLevel	This setting allows user to determine what will happen to recipients that mark a mailing as spam (int, NOT NULL)	Added in 10.0
ConnAttemptAsSendTryForCluster	for clusters, 'T' means each connection attempt counts as a sendtry	Added in 10.0
DALPurgeAgeHours	maximum age of lyrDeliveryAttemptLog entries before purging (in hours), default 1 week (smallint, NOT NULL)	Added in 10.0
DAOLoggingLevel	This setting determines what level of logging will occur in the DeliveryAttemptLog (varchar(255), NULL)	Added in 10.0
DbVersion	What version of ListManager is this database for. (int(4), default '0')	
DefaultDomain	What, if any, should be added to the domain if not provided by the user? For example, if mail is sent to 'bob' with no @, what @domain should be appended? (varchar(50), NULL)	
DigestFooter	Server level digest footer. (text, NULL)	
DigestHeader	Server level digest header. (text, NULL)	
DisableRegexBadFirstLines	Whether ListManager should check first lines of mailings. (bool)	
DisableRegexBadFrom	Whether ListManager should check From: addresses. (bool)	
DisableRegexBadSubject	Whether ListManager should check subject lines. (bool)	
DNSServer	IP address of DNS proxy server; leave blank to use integrated DNS server (recommended) (varchar(15), NULL)	Added in 8.0
DNSUseRemote	Whether ListManager should use a remote DNS server. T or F, defaults to 'F' (bool)	Added in 8.8
EAEEmailAddress	The contact email address displayed in EmailAdvisor for rebrandable licenses. (varchar(255NULL))	Added in 8.8
EAlmageURL	The image URL number displayed in EmailAdvisor for rebrandable licenses. (varchar(255NULL))	Added in 8.8
EATelephone	The contact telephone number displayed in EmailAdvisor for rebrandable licenses. (varchar(255NULL))	Added in 8.8
EnableContentInternational	Whether ListManager should allow different character sets when creating Content or Mailings. (bool)	
EnableReportLegends	Whether ListManager should display legends for reports. (bool)	
ExtensionsDirectory	What directory ListManager should use for program extensions. (varchar(100), NULL)	
ForwardMailIP	IP address to forward non-ListManager mail to. (varchar(15), NULL)	
ForwardMailPort	Port to forward non-ListManager mail to.(smallint(2), NULL)	
FCCUrl	URL from which to download wireless domain for automatic banning. Defaults to "http://ftp.fcc.gov/Bureaus/CGB/DomainNames/DomainNames.txt" (varchar(255), NULL).	Added in 8.95.

GlobalBanServerAddress	IP address of global ban server. (varchar(15), NULL)	
GlobalBanServerPassword	Password for global ban server. (varchar(50), NULL)	
GlobalBanServerPort	Port of global ban server. (smallint(2), NULL)	
GuiTimeOut	Length of time, in minutes, before the administrator GUI should time out (int (NULL))	Added in 8.8
HomepageNotice	Through the interface, administrators can set up a message to be displayed on the home page. This message can be seen by all nodes in the cluster and is stored here.	
HideDisclaimerMenus	Whether ListManager should display menu items disabled by the server's activation code. (bool)	
IncrBlockedExpireHours	(added to the sum of retry times) determines how long to wait before expiring blocked recipients(smallest, NOT NULL)	Added in 10.0
InmailPurgeDays	The number of days ListManager should keep incoming mail before purging it. (smallint(2), default 5)	
LastAutoDocSendID	Internal use only. The last Member ID checked for sending a document. (int(4), default 0)	
LastUpdate	Internal use only. The last time this table was updated. (datetime(8))	
LogFileCount	Maximum number of log files to allow in debug log directory. Default is 0, or forever. Lowest number allowed is 10. (int (4), default 0)	Added in 8.8
LogFileLines	The number of debug log lines to keep in file before rotating. (int(4), default 100000)	
LoggingErrorLevel	What level of logging ListManager should display in the debug log. (tinyint(1), default 30)	
LogToConsole	Whether ListManager should log errors to the console window. (bool)	
LogToFile	Whether ListManager should log errors to a file. (bool)	
LogWhatSubsystems	Which subsystems should ListManager log. (int(4), default 2147483647)	
LoopBreak	How many repeated messages should ListManager accept before blocking it as a loop. (smallint(2), default 50)	
LoopExceptions	Which email addresses should not be subject to loop restrictions. (text, NULL)	
DisableMemberHolds	Whether putting members on hold should be disabled for the entire server. (bool)	
MaxCommandBodyLinesHtml	smallint size: 2  nullable: 0	
MaxCommandBodyLinesText	smallint size: 2  nullable: 0	
MaxIncomingConnections	regulates the maximum number of simultaneous incoming connections	Added in 10.0
MaxMessageSize	The maximum size message ListManager should receive, in bytes. (int(4), default 10485760)	

MaxSubscribeBodyLines	The maximum number of lines allowed in a subscription email before considering it spam. (smallint(2), default 6, NULL)	
MaxSubscribeBodyLinesHTML	The maximum number of lines allowed in a subscription HTML email message before considering it spam. (smallint(2), default 16, NULL)	
MaxSubUnsubBodyLinesHtml	smallint size: 2  nullable: 0	
MaxSubUnsubBodyLinesText	smallint size: 2  nullable: 0	
MergeAllowBody	Whether ListManager should allow scripting in message bodies. (bool)	
MergeCapabilities	What level of scripting should ListManager allow in messages. (tinyint(1), default 1)	
MergeRcptToInTestMailing	Whether ListManager should merge in the recipient's email address into test mailings. 'F' (default) merges in the sample member email address. (bool, 'F').	
MessageFooter	Sever level message footer. (text, NULL)	
MessageHeader	Sever level message header. (text, NULL)	
MessageFooterHTML and MessageHeaderHTML	Added to separate text footers from html footers.	Added in 8.95.
MetricsPurgeDays	How many days should ListManager keep system metrics, such as server sending speed. (int(4), default 0)	
MimeModerationNotice	Whether ListManager should send notification of messages to moderate in MIME format. (bool)	
MinBlockedExpireHours	The minimum amount of time to wait before expiring blocked recipients (smallint, NOT NULL)	Added in 10.0
MriShowAllSites	Whether ListManager should show lists from all sites in the Discussion Forum Interface. (bool)	
NameCheck	When receiving a posting to a list, whether ListManager should try to match the name of the poster to an authorized sender if the email address does not match. (bool)	
NextConnectionRetryMinutes	how long to wait before retrying a connection to a non-responding host	Added in 10.0
NumInmailRetries	Number of times to retry processing of incoming mail that fails to process the first time (default=10) (int, NOT NULL)	Added in 8.95
OutmailPurgeDays	The number of days ListManager keeps outmail records that are not mailings to lists. (int(4), default 5)	
PgmAfter	Program ListManager should run after messages sent to the listmanager@address. (varchar(255), NULL)	
PgmBefore	Program ListManager should run before messages sent to the listmanager@address. (varchar(255), NULL)	

PiperCompany	Company name used for EmailAdvisor service (varchar(100), NULL)	Added in 8.8
PiperPassword	Password used for EmailAdvisor service (varchar(25) or (varchar2(50) : Oracle only), NULL)	Added in 8.8
PiperUserName	User name used for EmailAdvisor service (varchar(50) or (varchar2(50) : Oracle only), NULL)	Added in 8.8
RebrandEmail	Word to replace "lyris" in messages sent from the server. (varchar(50), NULL)	
RebrandName	Name to replace "Lyris ListManager" in messages sent from the server. (varchar(50), NULL)	
RcvDomains	Domains for which ListManager should receive mail. (text, NULL)	
RegexBadFirstLine	This field is currently unused. (text, NULL)	
RegexBadFrom	This field is currently unused. (text, NULL)	
RegexBadSubject	This field is currently unused. (text, NULL)	
RemoveCommandAddrs	What command addresses should ListManager not respond to. (text, NULL)	
RetryTiming	The amount of time since the last attempt before another attempt is made. (varchar(100), default '30,720')	
Rewrite	Rewrites incoming "From" header. (text, NULL)	
RunExtensions	Whether ListManager should allow programs to be run after it performs tasks. (bool)	
SegmentPermissions	What level of segmentation should ListManager grant to list administrators. (tinyint(1), default 1)	
Session_Enable	'T' if sessions are enabled (char(1), NOT NULL)	Added in 10.0
Session_IdleTimeout	idle time (in minutes) before a session times out (smallint, NOT NULL)	Added in 10.0
Session_LoginUrl	redirection URL for the login page (varchar(2000), NOT NULL)	Added in 10.0
Session_MaxLifeTimeout	total time (in minutes) before a user is force to reauthenticate (smallint, NOT NULL)	Added in 10.0
Session_NoSSLMessage	Warning message if the user isn't logged in via SSL (varchar(2000), NULL)	Added in 10.0
ServerEncryptionId	Internal number used for web session uniqueness. (int(4), NULL)	
SPFAllowedIPs	IP addresses exempted from SPF checks (text, NULL)	Added in 8.8
SmtplnPort	The port ListManager should listen to for incoming SMTP connections. (int(4), default 25)	
SpfLevel	What level of SPF checking ListManager should perform on incoming mail. (tinyint(1) default 0)	
SuppressErrorResponse	if 'T', do not respond to failed email commands; helps prevent backspatter	Added in 10.0
TclMergeInit	The server level Tcl initialization string. (text, NULL)	Added in 8.8
TclPortHosts	The IP addresses ListManager should allow to connect via Tclport. (text, NULL)	
TclPortPassword	The password required by machines connecting via Tclport. (varchar(25), 'TCLPORTPasswd')	
TclPortTimeout	The amount of time TclPort should wait before closing an inactive, unresponsive connection.(smallint(2), default 100000)	
TclPortRecvPort	The port ListManager should listen to for Tclport	

	connections. (smallint(2), default 2021)	
TcpipWebReading	What IP addresses are allowed to access the Discussion Forum Interface. (text, NULL)	
TcpipAPIAdmin	IP addresses allowed to connect for API operations (text(2147483647), NULL)	Added in 10.0
TcpipWebListAdmin	What IP addresses are allowed to log in as list administrators. (text, NULL)	
TcpipWebSiteAdmin	What IP addresses are allowed to log in as site administrators. (text, NULL)	
TcpipWebServerAdmin	What IP addresses are allowed to log in as server administrators. (text, NULL)	
ToForward	Incoming forwarding rules. (text, NULL)	
ToRewrite	Incoming To: rewrite rules. (text, NULL)	
NntpPort	The port ListManager uses for NNTP. (smallint(2), default 119)	
TranslateLangID	The default language used by ListManager. (int(4), NULL)	
TzDstEndDay	Day of the month that Daylight Savings Time ends (smallint(2), NULL)	
TzDstEndMonth	Month of the year that Daylight Savings Time ends (smallint(2), NULL)	
TzDstEndTime	Time that Daylight Savings Time ends (example 7200/60 = 120 which is 2 hours thus 2am) (int(4), NULL)	
TzDstEndType	Determines whether your Daylight Savings Time rules are set to end on a specific day of the week or by an exact date (1 for exact date 0 for day of the week) (smallint(2), NULL)	
TzDstEndWeek	Week of the month that Daylight Savings Time ends (smallint(2), NULL)	
TzDstObserved	If Daylight Savings Time is observed: 1 for yes, 0 for no (smallint(2), NULL)	
TzDstStartDay	Day of the month that Daylight Savings Time starts (smallint(2), NULL)	
TzDstStartMonth	Month of the year that Daylight Savings Time starts (smallint(2), NULL)	
TzDstStartTime	Time that Daylight Savings Time starts (example 7200/60 = 120 which is 2 hours thus 2am) (int(4), NULL)	
TzDstStartType	Determines whether your Daylight Savings Time rules are set to start on a specific day of the week or by an exact date (1 for exact date 0 for day of the week) (smallint(2), NULL)	
TzDstStartWeek	Week of the month that Daylight Savings Time starts (smallint(2), NULL)	
TzOffset	Time in minutes offset from Greenwich Mean Time (smallint(2), NULL)	
TzRuleID	If you are using a pre-defined time zone rule, it's the rule ID of this rule (int(4), NULL)	
UseBlockingModeSpf	Whether ListManager should block incoming mail that takes too much time during the SPF check. (bool)	
WebAccessPurgeDays	The length of time ListManager should keep web access logs. (int(4), '0')	
UseFastErrorMail	Whether ListManager should process error mail in	

memory or in the Inmail queue. (bool)

## lyrClusterState

---

The lyrClusterState table holds cluster-wide state information about ListManager. Each row represents a different attribute. The values in this table are generally not user-configurable. The primary key for this table is ClassName, MemberName. This table was added in version 9.0.

Field Name	Description	Version Added
ClassName	Name of class to which this attribute belongs (varchar(30), NOT NULL)	Added in 9.0
DateValue	(datetime, NULL)	Added in 9.0
MemberName	Name of attribute (varchar(100), NOT NULL)	Added in 9.0
NumericValue	(numeric(28, 12), NULL)	Added in 9.0
StringValue	(varchar(1000, NULL))	Added in 9.0

## lyrConfigIPAddr

---

This table contains IP address and connection information for sites. Each site should have one and only one entry in this table for each node.

Key: AddressID

Field Name	Description	Version Added
AddressID	The primary key for this entry. (int(4), NOT NULL )	
SiteID	The identifier for this row in sites_. (int(4), NOT NULL )	
NodeID	The identifier for this row in lyrConfigNodeSettings. (int(4), NOT NULL )	
SMTPInAddress	The IP address to accept SMTP connections for this site. (varchar(15), NULL)	
SMTPInBanner	The banner to display for connections to this IP address. (varchar(50), NULL)	
NNTPAddress	The IP address to use for NNTP connections. (varchar(15), NULL)	
NNTPBanner	The banner to display for NNTP connections. (varchar(50), NULL)	

## lyrConfigNodeSettings

---

This table contains information for each ListManager instance or node. If ListManager is not clustered, there will be only entry in this table.

Key: NodeID

Field Name	Description	Version Added
NodeID	The primary key identifying this node. (int, NOT NULL )	
Activation	The activation code for this node. (varchar(100), NULL)	
BindDnsIP	The IP address this node should use when connecting to the internet for DNS lookups. (varchar(15), NOT NULL)	
GlobalBanServerBindIP	The IP address this node should use when connecting to the global ban server. (varchar(15), NOT NULL)	
HeloText	Node-specific HELO text to display when establishing inbound SMTP connections	9.2
LMAPIPort	This is an integer field indicating which portListManager should use to listen for connections to the Soap API (v1.5 and later).	
MachineIPAddresses	The IP addresses used for GUI listbox selections. (Text, NULL)	
MaxMegabits	The maximum number of megabits this node should send per hour. (int, NOT NULL )	
MaxMessagesPerHour	The maximum number of messages this node should send per hour. (int, NOT NULL )	
MaxOutboundSockets	The maximum number of outbound connections this node should make. (int, NOT NULL )	
NodeName	The name of this node. (varchar(30), NULL)	
TclPortBindIP	The IP address(es) this node should accept Tclport connections on. (Text, NULL)	
Serial	The serial number for this node. (varchar(30), NULL)	

HeloText Node-specific HELO text to display when establishing inbound SMTP connections

## IyrDbConnections

---

This table is used by ListManager for ODBC connections.

Primary Key: ConnID

Field Name	Description	Version Added
ConnID	An auto-numbering field to provide a unique ID for this row. (int, NOT NULL)	Added in 8.8
ConnName	User-specified name of connection for display. (varchar(50), NOT NULL)	Added in 8.8
ConnStr	ODBC connection string (format is specific to driver being used) (varchar(1024), NOT NULL)	Added in 8.8
Site	What list or sites is this connection associated with. Association formatted like document association ("list: listname", "site: sitename", "all"). (varchar(66), NOT NULL)	Added in 8.8

SelectQuery ODBC 'select' query. (text, NULL)

Added in  
8.8

## IyrRelayHosts

---

The information in this table is used to direct mail to relay host(s) if ListManager is configured to do so.

Field Name	Description	Version Added
Host	The hostname of the relay host. (varchar(15), NOT NULL)	
Port	The port ListManager should connect to for this host. (smallint(2), NOT NULL)	
MaxConnections	The maximum number of connections to this relay host. (smallint(2), NOT NULL)	

## IyrTimeZoneRules

---

TzCode	Reserved for future use
TzCodeDST	Reserved for future use
TzDstEndDay	Day of the month that Daylight Savings Time ends
TzDstEndMonth	Month of the year that Daylight Savings Time ends
TzDstEndTime	Time that Daylight Savings Time ends (example 7200/60 = 120 which is 2 hours thus 2am)
TzDstEndType	Determines whether your Daylight Savings Time rules are set to end on a specific day of the week or by an exact date (1 for exact date 0 for day of the week)
TzDstEndWeek	Week of the month that Daylight Savings Time ends
TzDstObserved	If Daylight Savings Time is observed: 1 for yes, 0 for no
TzDstStartDay	Day of the month that Daylight Savings Time starts
TzDstStartMonth	Month of the year that Daylight Savings Time starts
TzDstStartTime	Time that Daylight Savings Time starts (example 7200/60 = 120 which is 2 hours thus 2am)
TzDstStartType	Determines whether your Daylight Savings Time rules are set to start on a specific day of the week or by an exact date (1 for exact date 0 for day of the week)
TzDstStartWeek	Week of the month that Daylight Savings Time starts
TzName	Name of the time zone
TzOffset	Time in minutes offset from Greenwich Mean Time
TzRuleID	If you are using a pre-defined time zone rule, it's the rule ID of this rule



## Summary of the "sites\_" fields in ListManager

---

The sites\_ table stores information about the different sites supported by this ListManager server. Lyris ListManager allows you to define different virtual domains for the outside world. For example, one single ListManager server could support CheapTickets.acme.com, GreatVacations.acme.com, and BanjoDiscussions.banjo.org. To users these look like three different servers, but they are all managed from one ListManager configuration.

Primary Key: SiteID\_

Field Name	Description	Version Added
AllowWYSIWYG_	Whether this site should have the HTML editor enabled by default. (bool, 'T' is default)	Added in 8.5
City_	City location of this site (varchar(100), NULL )	
Comments_	Additional comments about this site (from document table) (varchar(200), NULL)	
Country_	location of this site (varchar(40), NULL)	
CTDomains_	text(2147483647), NULL	
CTEnable_	char(1), NOT NULL	
CTEnableAllDomains_	char(1), NOT NULL	
CTToken_	char(16), NULL	
DefaultEncodingID_	int(4), NULL	
Desc_	Short description of this site (from document table) (varchar(200), NULL)	
DigestFtr_	Text that should be appended to every digest on the lists in this site (Text, NULL)	
DKHeaders_	Colon separated list of mail headers to be included in messages signed	9.2
DKSelector	DomainKeys selector sub-domain	9.2
DKSiteKey_	The PEM encoded DomainKeys private key	9.2
DKSiteSign_	Y: Sign email sent from this site; N: Don't sign	9.2
DigestHdr_	Text that should be prepended to every digest on the lists in this site (text, NULL)	

DomainName_	Domain name (Hostname) that this site should answer to (varchar(100), NULL)	
GuiHost_	The name of the web interface domain used for clickthroughs and other customer interaction (varchar(100), NULL)	
HideMRIEmails	(char(1), NOT NULL)	10.0
LicenseLevel_	Limit the site to a lower license level. Useful for hosting situations. Values are (S, P, E) (char(1), NULL)	
MailAddr_	Postal mailing address for this site (from document table) (varchar(238), NULL)	
MainAdmin_	Reference to main administrator of this site (from people table) (varchar(50), NULL)	
MailStreamID_	The Mail Stream associated with this Site (int, NULL)	10.0
MessageFtr_	Text that should be appended to every message on the lists in this site (text, NULL)	
MessageHdr_	Text that should be prepended to every message on the lists in this site (Text, NULL)	
MessageFtrHTML_ and MessageHdrHTML_ Name_	Added to separate text footers from html footers	Added in 8.95.
OwnerGIF_	Name which identifies this site. e.g.: 'Example Group Ltd' (varchar(30), NOT NULL)	
PiperCompany_	URL to GIF for Owner's logo (varchar(100), NULL)	
PiperPassword_	Company name used for EmailAdvisor service (varchar(25), NULL)	Added in 8.8
PiperUserName_	Password used for EmailAdvisor service (varchar(50), or varchar2(50) : Oracle only), NULL)	Added in 8.8
SiteID_	User name used for EmailAdvisor service (varchar(50), or varchar2(50) : Oracle only), NULL)	Added in 8.8
TclMergelnit	Unique identifier for this site. (int, NOT NULL)	
TechSupp_	The site level Tcl initialization string. (text, NULL)	Added in 8.5
TranslateLangID_	Reference to technical support contact for this site (from people table) (varchar(50), NULL)	
URLLyris_	The default translation language for this site. Applies to default list documents if translated versions exist and to the web interface (int, NULL)	
URLOwner_	URL to ListManager 5.0 homepage for this site (varchar(100), NULL)	
WWWPort_	URL for owner's site. eg: http://www.example.com (varchar(100), NULL)	
	What port to use for this web server. eg: 80 (varchar(10), NULL)	

## Summary of the "lists\_" fields in ListManager

---

The lists\_ table stores configuration information for every list in the system. A list must be associated with a topic, and the topic with a site. The list settings control many

aspects of ListManager processing, from who can post and make changes to which documents are sent for the Hello and Goodbye logic and what headers and footers are inserted into messages.

Primary key: ListID\_

<b>Field Name</b>	<b>Description</b>	<b>Version Added</b>
AddHeadersAndFooters_	Should ListManager add the email headers and footers automatically to new content. N = Never, A = Automatic, I = Insert into content/mailling during creation. (char (1) default='N')	Added in 8.5
Additional_	Additional fields that should be requested from new subscribers [inactive](text, NULL)	
Admin_	Administrator responsible for this list (link to people) (varchar(50), NOT NULL)	
AdminSend_	Only Admins can send mail to the list (bool)	
AllowCross_	Allows cross-posting of identical messages (bool)	
AllowDupe_	Allows posting of identical messages (bool)	
AllowInfo_	Allow non-members to read general information about this list (bool)	
Anonymous_	If true, the messages posted to the list are stripped of all identifying markers, so that they become anonymous (bool)	
AnyonePost_	Anyone can post to the list, even non-members (bool)	
ApproveNum_	Number of messages have to be approved before a new person can post unapproved (smallint, NOT NULL)	
ArchivDays_	Keep message archives around for how many days (smallint, NOT NULL)	
ArchivNum_	Keep how many individual messages archived (int, NOT NULL)	
BlnkSubjOk_	If set to TRUE, then Lyris will allow messages that have a blank subject line (bool)	
Child_	If set, then this list can act as a 'child' list to other lists, meaning that this list can be a member of another list, and receive postings from that list. If this is not set, Lyris automatically rejects posting submissions from other lists as possible error-mail or loop conditions. (bool)	
CleanAuto_	Do not mark as 'held' members who bounce too much email (ie: let them bounce all they want) (bool)	
CleanDays_	After how many days a user is 'held' should we purge them (smallint, NOT NULL)	
CleanNotif_	For how many days after a user is 'held' should we send them reminder messages (smallint, NOT NULL)	
CleanUnsub_	After how many days a user is 'unsub' should we purge them (smallint, NOT NULL)	
Comment_	Holds whatever comments the programmer wishes to put in. Useful as a user-defined 'additional info' field. (text, NULL)	
CommentsID_	Comment about this list (link to document) (int, NULL)	
ConferencePost_	Who is allowed to post to the list's conference: A =	

	admin only, M = members only, E = everyone (char(1), NOT NULL)	
ConferenceVisibility_	Who can access the conference: D - disabled conference, M - members only, E - everyone (char(1), NOT NULL)	
ConferenceDuration_	How long the contents of a conference are kept in memory: stored in hours. (smallint, NOT NULL)	
ConfDays_	How many days after a member has not confirmed to list should he be deleted (smallint, NOT NULL)	
ConfNotify_	At what day interval should held members receive notification (tinyint, NOT NULL)	
ConfUnsub_	When unsubscribing over email, should 2=do it immediately, 1=confirm always, 0=confirm only if questionable (tinyint, NOT NULL)	
CreatStamp_	Date/time stamp this list was created ( smalldatetime, NULL)	
CrossClean_	Clean out duplicate recipients with cross-posts, so that members of multiple lists only receive one copy of a message (bool)	
DefaultFrom_	The 'from' value that should be used as a default for this list. (varchar(200), NULL)	
DefaultTo_	The value for the TO header, if it is not provided (varchar(200), NULL)	
DefaultSubject_	The value for the SUBJECT header, if not provided. (varchar(100), NULL)	
DefaultSubsetID_	The ID number of the subset that this list should use by default when creating new mailings. If set to 0, defaults to the entire list.(int, NULL)	8.95
DeliveryReports_	What delivery reports should be sent to admins via email (int, NULL)	
DescLongID_	Long description of this list (link to document) (int, NULL)	
DescShort_	Short description of this list (varchar(200), NOT NULL)	
DetectHtmlByDefault_	Should new messages created in the web interface detect HTML by default. (bool)	
DetectOpenByDefault_	Should new messages created in the web interface perform open detection by default. (bool)	
DigestFtr_	Text that should be appended to every digest (text, NULL)	
DigestHdr_	Text that should be prepended to every digest (text, NOT NULL)	
Disabled_	If set, then this list is disabled. The list admin is not allowed to send any email to the list (bool)	
ErrHold_	After how many days of mail bounces should a member be placed on hold? (default=5) (tinyint, NOT NULL)	
ErrReset_	After how many days of not bouncing mail should a member's bounce count be reset to 0 (default=5) (tinyint, NOT NULL)	
ExpireDays_	How many days after a member has expired, should he be deleted (smallint, NOT NULL)	
From_	If filled in, this specifies the from field of every message send on this list (varchar(100), NULL)	

HdrRemove_	Headers that should be removed from list postings (text, NULL)	
Hidden_	Controls whether this mailing list is hidden in the web and via email (bool)	
KeepOutmailPostings_	How long to keep postings in the outmail_ table. More data gives more accurate reports, but slows the server performance. (smallint, NOT NULL)	
Keywords_	Keywords that describe this list (varchar(200), NULL)	
ListID_	An incrementing numeric counter for the list (int, NOT NULL)	
ListSubj_	Should we prepend the list name to the subject line of every outgoing list message (char(1), NOT NULL)	
MaxMembers_	Maximum number of members allowed on this list. If set to 0, then no limit (int, NOT NULL)	
MailStreamID_	The Mail Stream associated with this Recipient (int, NULL)	
MaxMessNum_	Maximum number of messages that can be sent to the list in 24 hour period (0=unlimited) (smallint, NOT NULL)	
MaxMessSiz_	In bytes, the maximum size of allowed messages from non-admin people (int, NOT NULL)	
MaxPerUser_	What is the maximum number of messages that a single user can post on a single day to this list (int, NOT NULL)	
MaxQuoting_	What is the maximum number of contiguous lines that can be quoted at once in a single message (int, NOT NULL)	
MergeAllowBody_	Are Tcl mail merge tags evaluated in the body of the message ( tinyint, NOT NULL)	
MergeCapabilities_	What capabilities are allowed for Tcl mail merging (tinyint, NOT NULL)	
MergeCapOverride_	Whether this list should override the server mail merging settings(tinyint, NOT NULL)	
MessageFtr_	Text that should be appended to every message (text, NULL)	
MessageHdr_	Text that should be prepended to every message (text, NULL)	
MessageFtrHTML_ and MessageHdrHTML_	Added to separate text footers from html footers.	Added in 8.95.
ModHdrDate_	If set, then moderated messages have their Date: header rewritten to be the date/time that they are approved, removing the original Date: header stamp (char(1), NOT NULL)	
Moderated_	How often, if at all, is this list moderated? (varchar(20), NOT NULL)	
MriVisibility_	Whether the Discussion Forum Interface should be generally visible, visible only when accessing the URL directly, or inaccessible. V = Visible, H = Hidden (visible if you know the URL), I = Inaccessible (char (1), default 'V')	Added in 8.5
Name_	Internal name which identifies this mailing list, not seen by users (varchar(60), primary key, NOT NULL)	
NameReqd_	When subscribing over the web, should 0=name is	

	optional, 1=name is not asked for, 2=require name (tinyint, NOT NULL)	
NoArchive_	Messages on this mailing list should not be archived (bool)	
NoBodyOk_	If set to TRUE, then Lyris will allow messages with a blank body through to the mailing list (bool)	
NoConfirm_	Do not send out a confirming message to new subscribers to make sure they used the same email address (bool)	
NoEmail_	Reject all submissions by email. Submissions must be by web (bool)	
NoEmailSub_	Disallow all subscriptions via email? (bool)	
NoListHdr_	If true, the list-help headers are not included (bool)	
NoMidRwr_	If set to TRUE, then Lyris will not rewrite the Message-ID, but instead leave it alone, and use X-Lyris-Message-ID (bool)	
NoNNTP_	Do not make this group available over NNTP (bool)	
NoSearch	Messages on this mailing list should not be full text indexed, and will not be searchable (bool)	
PasswdReqd_	When subscribing over the web, should 0=password is optional, 1=password is not asked for, 2=require password (tinyint, NOT NULL)	
PgmAfter_	Program to execute after a message has been posted to the list (Text, NULL)	
PgmBefore_	Program to execute before a message is posted to the list (text, NULL)	
PgmSub1_	Program to execute before a member is subscribed (text, NULL)	
PgmSub2_	Program to execute after a member is subscribed (text, NULL)	
PgmUnsub1_	Program to execute before a member is unsubscribed (text, NULL)	
PgmUnsub2_	Program to execute after a member is unsubscribed (text, NULL)	
PiperCompany_	Company name used for EmailAdvisor service (varchar(100), NULL)	Added in 8.8
PiperPassword_	Password used for EmailAdvisor service (varchar(50), NULL) Password used for EmailAdvisor service (varchar(50) or (varchar2(50) : Oracle only), NULL)	Added in 8.8
PiperUserName_	User name used for EmailAdvisor service (varchar(25) or (varchar2(50) : Oracle only), NULL)	Added in 8.8
PostPass_	If set, then postings require the user password in the body of the text somewhere. 0=no requirements, 1=required if member has one, 2=all members need a password (tinyint, NOT NULL)	
PrivApprov_	Search rules for auto-approving applications to a private list (Text, NULL)	
PrivDays_	How many days after a member has applied to a private list, should he be deleted if not approved (smallint, NOT NULL)	
PrsvXTags_	Should we preserve X-.... SMTP header tags (bool)	
RecencyDayCount_	How many days to check for recent mailings (smallint, NOT NULL)	

RecencyEmailEnabled_	Is recency checking enabled for this list? (char, NOT NULL)	
RecencyMailCount_	How many mailings should trigger recency limits? (smallint, NOT NULL)	
RecencyOperator_	When checking for recency, should the number of mailings be (m)ore than, (e)qual to or (l)ess than the number in RecencyMailCount_? (char, NOT NULL)	
RecencySequentialEnabled_	Apply recency limits to sequential mailings? (bool)	
RecencyTriggeredEnabled_	Apply recency limits to triggered mailings? (bool)	
RecencyWebEnabled_	Apply recency limits to posting created by admins in the web interface? (bool)	
RecipientLoggingLevel_	What level of delivery logging should there be? (N)o logging, non-SMTP errors (m), all (e)rrors, errors and successes (f). (char, NULL)	
ReferralPurgeDays_	Purge referral data after how many days? (smallint, NOT NULL)	
ReferralsPerDay_	The maximum number of people that a member can refer, per day. (smallint, NOT NULL)	
RelHour_	The hour that this message should be automatically approved (tinyint, NOT NULL)	
RelPending_	If a pending message hasn't been approved after X days, then send it anyway (tinyint, NOT NULL)	
ReplyTo_	If filled in, this specifies the reply-to field of every message send on this list (varchar(100), NULL)	
ReviewPerm_	What security permission to put on 'review' command? 0=only admins, 1=only members, 2=anyone (tinyint, NOT NULL)	
SMTPFrom_	If filled in, this specifies the SMTP from field of every message send on this list (varchar(100), NULL)	
SMTPHdrs_	Text that should be included in the SMTP header of every message (text, NULL)	
Security_	Is this list 'private' (admin approval) 'closed' (admin must add you) 'password' (you need the password) 'open' (varchar(8), NOT NULL)	
SimpleSub_	Should this list not allow any of the fancy options, such as norepo/noack/password/etc? (bool)	
SponsOrgID_	Organization that is sponsoring this list (link to document, type is organization) (int, NULL)	
SubNotDays_	What days of the month should a subscriber/unsubscriber report be sent to the list admins? Choices are daily, monthly, monday tuesday wednesday, thursday, friday, saturday, sunday, and modifiers appended to this can be -nochart (do not include chart of activity) and -email (include email addresses) (text, NULL)	
SubPasswd_	If this list is 'password' protected for new subscribers, what is the password? (varchar(50), NULL)	
SyncConnID_	lyrDbConnections.ConnID to use when synchronizing this list. (int, NULL)	Added in 8.8
SyncDeleteMode_	What to do with members on list but not in remote DB. (N)o changes, mark (R)emoved. (char (1), default 'N')	Added in 8.8
SyncInsertMode_	What to do with members in remote DB and not on list. (Q)uiet, (R)egular (send hello), (C)onfirm, use (E)xternal member type. (char (1), default 'Q')	Added in 8.8

SyncMaxMalformed_	How many malformed members to accept in remote DB. (int '10')	Added in 8.8
SyncNextTime_	Date/time of next synchronization. (datetime, NULL)	Added in 8.8
SyncPreviousSuccessTime_	Date/time of last synchronization success. (datetime, NULL)	Added in 8.8
SyncPreviousTime_	Date/time of previous synchronization attempt (may or may not have been successful) (datetime, NULL)	Added in 8.8
SyncSchedule_	How often to synchronize list compared to the scheduled task. (N)ever, (E)very time, (D)aily, (W)eekly. (char (1), default 'N')	Added in 8.8
SyncTimeRule_	Time of day to synchronize list compared to the scheduled task. (A)nytime, (W)indow. (char (1), default 'A')	Added in 8.8
SyncUpdateMode_	What to do with members in remote DB and on list but with different status: (N)o changes, (E)xcept member type, (A)ll including member type. (char (1), default 'N')	Added in 8.8
SyncWeekDay_	Day of week to perform synchronizations. 1=Sunday 7=Saturday (smallint '1')	Added in 8.8
SyncWindowStart_	Beginning of synchronization window in a given day. (small datetime, '2000-01-01 0:00')	Added in 8.8
SyncWindowEnd_	Ending of synchronization window in a given day. (small datetime, '2000-01-01 0:00')	Added in 8.8
TclMergeInit	The list level Tcl initialization string. (text, NULL)	Added in 8.5
To_	If filled in, this specifies the To: field of every message send on this list (varchar(200), NULL)	
Topic_	Topic that this list belongs to (varchar(50), NOT NULL)	
TrackAllURLs_	Should all URLs in content be automatically made into tracking URLs when the content is saved (bool, 'F')	Added in 8.5
TranslateLangID_	The default translation language for this site. Applies to default list documents if translated versions exist and to the web interface (smallint, NOT NULL)	
URLList_	URL to list's homepage (varchar(100), NULL)	
URLLogo_	URL to GIF/JPEG list logo (varchar(200), NULL)	
VisibGlobl_	Visible via 'list global'? (bool)	
Visitors_	Allow non-members to visit the list Web site without joining (they cannot contribute) (bool)	
WarnNoRecips_	Whether to send a warning to sender if list posting goes to no recipients (bool, 'T' is default)	8.95

## Summary of the "topics\_" fields in ListManager

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The topics\_ table organizes lists together under a particular site. Multiple lists can be associated with the same topic, and every topic has exactly one site.

Primary key: Title\_

Field Name	Description	Version
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		<b>Added</b>
Admin_	Administrator responsible for this list (link to people) (varchar(50), NULL)	
Comment_	Comment about this topic (link to document) (varchar(200), NULL)	
Desc_	Short description of this topic (link to document) (varchar(200), NULL)	
DescLong_	Long description of this topic (link to document) (varchar(200), NULL)	
Hidden_	Controls whether this topic is hidden in the web (char(1), NOT NULL)	
Keywords_	Keywords that describe this topic (varchar(200), NULL)	
SiteName_	What site does this belong to (varchar(30), NOT NULL)	
SponsOrg_	Organization that is sponsoring this topic (link to document, type is organization) (varchar(200), NULL)	
Title_	Unique title of this topic (varchar(50), NOT NULL)	
URLLogo_	URL to GIF/JPEG topic logo (varchar(200), NULL)	
URLOrgLogo_	URL to a gif/jpeg logo for this organization (varchar(100), NULL)	
URLTopic_	URL to topic's homepage (varchar(100), NULL)	

## Content

### IyrMessageImages

Rendered images used in mailings. This table is reserved for future use.

<b>Field Name</b>	<b>Description</b>	<b>Version Added</b>
ArchiveMessageID	messages_.MessageID_ to which this image is assigned. (int, NULL)	9.2
ImageContentType	MIME content-type of the image. (varchar(255), NOT NULL)	9.2
ImageData	Rendered image. (binary data, NULL)	9.2
ImageSize	Size in bytes of the image. (int, NOT NULL)	9.2
MessageImageID	Unique ID identifying this message image.	9.2
OutmailID	outmail_.MessageID_ to which this image is assigned. (int, NULL)	9.2

### IyrContentFields

Template-field-specific content associated with a template or content. This table is reserved for future use.

<b>Field Name</b>	<b>Description</b>	<b>Version Added</b>
ContentFieldID	Unique ID identifying this field content. (int, identity, NOT NULL)	9.2
DocID	DocID_ of template or content to which this field content is	9.2

	associated. (int, NOT NULL)	
FieldType	FieldType of this field. (varchar(20), NOT NULL)	9.2
FieldName	User-editable name of this field. (varchar(255), NOT NULL)	9.2
FieldText	Textual field data when FieldType is HEADLINE or PARAGRAPH. (text, NULL)	9.2
FieldImageID	ImageID when FieldType is IMAGE. (int, NULL)	9.2

## lyrContentFieldParams

Field Name	Description	Version Added
ContentFieldParamID	Unique ID identifying this field content parameter. (int, identity, NOT NULL)	9.2
ContentFieldID	ContentFieldID of associated field content. (int, NOT NULL)	9.2
ParamKey	Parameter key name. (varchar(255), NOT NULL)	9.2
ParamValue	Parameter value. (text, NULL)	9.2

## lyrContentFieldTypes

Lookup table for the allowed template field types in lyrContentFields. This table is reserved for future use

Supported field types:  
 HEADLINE  
 PARAGRAPH  
 IMAGE

Field Name	Description	Version Added
FieldType	Unique ID identifying this field type. (varchar(20), NOT NULL)	9.2
Description	Textual description of this field type (varchar(100), NOT NULL)	9.2

## lyrImages

Images that can be used in templates, content, and mailings. When uploaded, each image is assigned to the current site. When assigned to template, content, or mailing, the lyrImage row is copied to a new row and marked as in-use by the template, content, or mailing.

Field Name	Description	Version Added
DocID	Template or content DocID_ to which this image is assigned.	9.2

	(int, NULL)	
ImageContentType	MIME content-type of the image. (varchar(255), NOT NULL)	9.2
ImageData	This column is reserved for future use. (binary data, NULL)	9.2
ImageFolderID	ImageFolderID in which this image resides. When null, this image has been assigned to a template, content, or mailing. (int, NULL)	9.2
ImageHeight	Height in pixels of the image. (int, NOT NULL)	9.2
ImageID	Unique ID identifying this image. (int, identity, NOT NULL)	9.2
ImageSize	Size in bytes of the image. (int, NOT NULL)	9.2
ImageTitle	User-editable name of this image. Within an image folder, ImageTitle must be unique. (varchar(255), NOT NULL)	9.2
ImageWidth	Width in pixels of the image. (int, NOT NULL)	9.2
InmailID	inmail.MessageID_ to which this image is assigned. (int, NULL)	9.2
LastUpdated	Date/time of the last modification to the image. (datetime, NOT NULL)	9.2
ModerateID	moderate_.MessageID_ to which this image is assigned. (int, NULL)	9.2
RemoteUrl	URL of the image. (varchar(4000), NULL)	
SiteID	Site ID to which this image belongs. (int, NULL)	9.2
ThumbData	Thumbnail-size version of image. (binary data, NULL)	9.2

## lyrImageFolders

Image folders organizing images in lyrImages. Folders are assigned to sites. Images in a folder are viewable by admins on any list in the site.

Field Name	Description	Version Added
FolderID	Unique ID identifying this image folder. (int, identity, NOT NULL)	9.2
FolderName	User-editable name of this folder. Folder name must be unique within the site. (varchar(255), NOT NULL)	9.2
SiteID	Site ID for this image folder. (int, NULL)	9.2

## Summary of the "mimeencodings\_" fields in ListManager

This table stores the standard MIME encoding types. Note that the "binary" type is not used in practice and has been omitted.

Primary key: EncodingID\_

Field Name	Description	Version Added
EncodingID_	An auto-incrementing ID field that uniquely identifies a record in this table (int, NOT NULL)	

Name_	This is the MIME encoding type. It can only be one of 7bit, 8bit, quoted-printable, or base64 (varchar(40), NULL)
Desc_	A text description. Informational only (varchar(120), NULL)

## Summary of the "mimecharsets\_" fields in ListManager

This table stores the standard MIME character sets that can be used to create international content.

Primary key: CharSetID\_

Field Name	Description	Version Added
CharSetID_	An auto-incrementing ID field that uniquely identifies a record in this table (int, NOT NULL)	
Name_	This is the MIME compatible name of the character set (varchar(40), NULL)	
Desc_	A text description. Informational only (varchar(120), NULL)	

## Summary of the "messagetypes\_" fields in ListManager

This table stores information about each internal message that is currently customizable.

Primary key: MessageTypeID\_

Field Name	Description	Version Added
MessageTypeID_	An auto-incrementing ID field that uniquely identifies a record in this table (int, NOT NULL)	
Name_	The name of this message type. For example "list-hello" (varchar(60), NULL)	
Desc_	A text description. Informational only (varchar(120), NULL)	
OutmailType_	This is the value used for the Type_ field in the outmail_ table for this message type (varchar(50), NOT NULL)	
OutmailTitle_	This is the value used for the Title_ field in the outmail_ table for this message type (varchar(70), NOT NULL)	

## Summary of the "docs\_" fields in ListManager

---

The docs\_ table stores predefined content that can be used in a variety of situations for sending mail. Documents may be pre-defined responses, such as the Hello or Goodbye document, or it can be content created for mailing to a list.

Primary key: DocID\_

Field Name	Description	Version Added
Created_	Date document was created (smalldatetime, NULL)	
Desc_	The author's description for this content. (varchar(100), NULL)	
DocID_	Unique document ID (int, identity, NOT NULL)	
DocType_	Type of the document, reference to doctypes_ table. (varchar(20) NOT NULL)	
EnableWysiwygEditor	Whether this document should have the HTML editor enabled by default. (bool, 'F' is default)	Added in 8.1
IsReadOnly_	If true, web interface will not let user change this document. (bool)	
IsTemplate_	Is this document a template? (bool)	
HdrFrom_	The from header argument that should be sent when delivered via SMTP. (varchar(200) NULL)	
HdrTo_	The to header argument that should be sent when delivered via SMTP. (varchar(200) NULL)	
NativTitle_	Title of the document, in its native language (varchar(100), NULL)	
Site_	Name of site this document belongs to. This field can be a sitename, a listname (in the form of "list:listname"), or "all" to designate a server-level document (varchar(66), NOT NULL)	
TemplateDocID_	DocID_ of template if this is content. (int, NOT NULL)	9.2
Title_	Title of the document, in English (varchar(200), NOT NULL)	
TrackAllUrls_	Should URLs in this template/content be tracked. (bool)	9.2

## Summary of the "doctypes\_" fields in ListManager

---

The doctypes\_ table is a lookup table for the allowed document types in the docs\_ table. Every DocType\_ in the docs\_ table should have an entry in the doctypes\_ table.

Primary key: DocType\_

Field Name	Description	Version Added
Desc_	Textual description of this document type (varchar(100), NOT NULL)	
DocType_	Unique ID identifying this document type (varchar(20), NOT NULL)	

### Document Types supported by ListManager

<b>DocType_</b>	<b>Description</b>
BILLING	Billing invoice data.
CONTENT	Content created to be sent to a list.
MESSAGE	An internal message sometimes sent to a user or an administrator.

## Summary of the "listdocs\_" fields in ListManager

The listdocs\_ table maps documents owned by a list to the docs\_ table, where the actual content resides.

Primary key: ListDocID\_

<b>Field Name</b>	<b>Description</b>	<b>Version Added</b>
ListDocID_	An auto-numbering column to provide a unique identifier for this row. (int, NOT NULL)	
IsDefault_	Is this a default document? (bool)	
ListID_	The list that this document is associated with. (int NOT NULL)	
DocID_	The ID of the document in the docs_ table. (int NOT NULL)	
MessageTypeID_	The type of the document, from the messagetypes_ table. (int, NOT NULL)	
TranslateLangID_	The language of this document, from the translatelang_ table. (int, NOT NULL)	

## Summary of the "sitedocs\_" fields in ListManager

This table maps documents owned by a site to the docs\_ table, where the actual content resides.

Primary key: SiteDocID\_

<b>Field Name</b>	<b>Description</b>	<b>Version Added</b>
SiteDocID_	An auto-numbering column to provide a unique identifier for this row. (int, NOT NULL)	
IsDefault_	Is this a default document? (bool)	
SiteID_	The site that this document is associated with. (int NOT NULL)	
DocID_	The ID of the document in the docs_ table. (int NOT NULL)	
MessageTypeID_	The type of the document, from the messagetypes_ table. (int, NOT NULL)	
TranslateLangID_	The language of this document, from the translatelang_ table. (int, NOT NULL)	

## Summary of the "docparts\_" fields in ListManager

---

The docparts\_ table holds the language specific version of content found in the docs\_ table. The docs\_ table might define a Hello document, for example, which would result in the actual body of the message appearing in the docparts\_ table, with one row for each language. Every entry in the docparts\_ table must reference a piece of content in the docs\_ table.

Primary key: UniqueID\_

Field Name	Description	Version Added
Body_	The body portion of the message. (text, NULL)	
CharSetID_	The character set from mimecharsets_ (int, NULL)	
ClauseWhere_	The table to join to for message personalization. (varchar (255) NULL)	Added in 8.5
DocID_	A reference to the content described in the docs_ table. (int, NOT NULL)	
EncodingID_	A reference to mimeencodings_ (int, NULL)	
HasBeenEncoded_	Has the data in this row already been encoded to this encoding method? (bool)	
HdrAdd_	Additional headers that should be added for this message. (Text, NULL)	
MimePartName_	The name of the content, for mime purposes. If it is an attachment, for example, is the file name of the attachment. (varchar(255), NULL)	
MimeTypeID_	A reference in to the mimetypes_ table telling what mime type this message is. (int, NULL)	A reference in to the mimetypes_ table telling what mime type this message is. (int, NULL)
UniqueID_	An auto-incrementing field that defines a unique identifier for this row. (int, NOT NULL)	An auto-incrementing field that defines a unique identifier for this row. (int, NOT NULL)

## Summary of the "mimetypetoext\_" fields in ListManager

---

The mimetypetoext\_ (Mime Types to Extensions) table is a lookup table for the allowed document types in the docs\_ table. Every DocType\_ in the docs\_ table should have an entry in the doctypes\_ table.

Primary key: none

Field Name	Description	Version Added
TypeID_	(int, NOT NULL)	

ExtensionID\_ (int, NOT NULL)

## Summary of the "mimetypes\_" fields in ListManager

---

The mimetypes\_ table is a lookup table defining a numeric identifier for a mime type and providing a description for that type.

Primary key: TypeID\_

Field Name	Description	Version Added
TypeID_	Auto-numbering identifier for the mime type. (int, Primary Key, NOT NULL)	
TypeName_	The mime type, such as text/html or text/plain. (varchar(40), NOT NULL)	

## Summary of the "mimeexts\_" fields in ListManager

---

The mimeexts\_ table is a lookup table of a numeric identifier for a mime extension, and the text description of the extension.

Primary key: ExtensionID\_

Field Name	Description	Version Added
ExtensionID_	An auto-numbering value to identify the extension. (int, Primary Key, NOT NULL)	
ExtensionName_	The name of the mime extension, such as "gif" or "txt". (varchar(10), NOT NULL)	

## Clicktracking

### Summary of "clickgroups\_" fields for ListManager

This table stores the group name for a Group ID identifier.

Primary key: GroupID\_



Field Name	Description	Version Added
GroupID_	An auto-numbering field to provide a unique ID. (int, NOT NULL)	
GroupName_	A textual description for this group. (varchar(100), NOT NULL)	

## Summary of "clickstreamdata\_" fields for ListManager

This table stores additional information about a click through/stream event. The standard information is recorded in the clicktracking\_ table, with the additional information provided in this table. Generally only one of these fields is present for each clickstream event, as supported by that technology.

Primary key: ClickID\_

Field Name	Description	Version Added
ClickID_	The ClickID_ value from the clicktracking_ table. (int, NOT NULL)	
UnitPrice_	The price recorded for this purchase. (numeric (2,2), NULL)	
Quantity_	The number of items purchased. (int, NULL)	
Points_	The points that this item represents. (int, NULL)	
Stage_	The stage that this item represents. (int, NULL)	
ProductSku_	The product SKU for this purchase. (varchar(25), NULL)	
OrderID_	The Order ID of this purchase. (varchar(25), NULL)	
CustomerID_	The customer ID, from the customer's accounting system, for this transaction. (varchar(25), NULL)	

## Summary of "urls\_" fields for ListManager

This table stores information about the URL for a message.

Primary key: UrlID\_

Note: On MSSQL, the URLText\_ may display only 256 characters when in fact up to 4000 characters are recorded.

Added or Modified in 8.9

Field Name	Description	Version Added
UrlID_	An auto-numbering field to server as a unique identifier for the row. (int, NOT NULL)	
PrettyName_	The text that the users sees as the link (ex: Click Me). (varchar (100), NULL)	
URLHash_	An MD5 hash of the UriText_ to enable MS SQL to index this table.(char(32), NOT NULL)	Added in 8.9
UriText_	The actual URL (varchar(4000), NOT NULL)	Field changed to 4000

## Summary of "clicktracking\_" fields for ListManager

This table stores information about click tracking, click stream, and open events.

Primary key: ClickID\_

Field Name	Description	Version Added
ClickID_	An auto-numbering field to provide a unique ID. (int, NOT NULL)	
GroupID_	The group that this click is associated with. (int, NOT NULL)	
IPAddress_	The IP address of the user clicking on a link. Stored as an int. (int, NOT NULL)	
MemberID_	The ID of the member who was sent the email which resulted in this click (int, NOT NULL)	
MessageID_	The ID from the outmail_ table that represents the mailing that caused this event. (int, NOT NULL)	
StreamWebPageName_	The user-provided name of the web page that caused this event. (varchar(255), NULL)	
TimeClicked_	The time that the click event occurred. (smalldatetime, NOT NULL)	
UrlID_	The ID from the URLs table that stores this URL. (int, NULL)	

## clicksummary\_

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Field Name	Description	Version Added
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## lyrMailingLinks\_

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Field Name	Description	Version Added
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## Charting

### Summary of the "usercolumninfo\_" fields in ListManager

This table describes demographics added to the members\_ table (or to a new table) so that they can appear as options in the custom charting wizards.

Primary key: ColumnInfoID\_

Field Name	Description	Version Added
ColumnInfoID_	An auto-numbering unique identifier for this row. (int, NOT NULL)	
ChartType_	The type of chart. (char(1), NOT NULL)	
Concept_	What concept should this column fall under, for organizational purposes. (varchar(20), NULL)	
Description_	A description of the data stored in this column. (varchar(255), NOT NULL)	
FieldName_	The name of the column. (varchar(30), NOT NULL)	
TableName_	The table that stores this column (normally members_). (varchar(50), NOT NULL)	

### Summary of the "chartdescription\_" fields in ListManager

This table is a lookup for allowed values in the performancemetrics\_ table for the axis of a chart.

Primary key: ChartID\_

Field Name	Description	Version Added
ChartID_	An auto-numbering field to provide a unique row identifier. (int, NOT NULL)	
BackgroundColor_	The RGB value of the background for this chart. (int, NULL)	
BucketSize_	The number of entries in each bucket. (varchar (10), NOT NULL)	
BucketType_	The type of calculation to apply to the bucket, such as 'sum' or 'std-deviation'. (varchar(20), NOT NULL)	
ChartTitle_	A title for the chart that will appear on the PNG image. (varchar(70), NULL)	
CreateDate_	The date and time the chart was first created. (smalldatetime, NOT NULL)	
Description_	A description of this chart. (varchar(255), NULL)	
EndDate_	For time range charts, the date and time that the chart should end with. (smalldatetime, NULL)	

GDChartType_	The type of chart (such as pie or line), using the numeric constants from GDChart. (tinyint, NOT NULL)
ModifiedDate_	The date and time the chart was last modified. (smalldatetime, NOT NULL)
Series_	Information about the series in the chart. (text, NULL)
Site_	The site associated with this chart. (varchar(50), NOT NULL)
StartDate_	For time range charts, the date and time that the chart should start with (smalldatetime, NULL)
YAxisLabel_	The textual label for the Y axis that will appear on the PNG image. (varchar(70), NULL)

## IyrCampaigns

---

Primary key: CampaignID

Field Name	Description	Version Added
CampaignID	A unique, auto-incrementing identifier for this row (int (4), NOT NULL)	
CampaignName	The unique name of this campaign. (varchar(50), NOT NULL)	
CampaignDescription	A description of this campaign. (varchar(200), NOT NULL)	
ListID	The identifier of this campaign in lists_. (int, NULL)	
SiteID	The identifier of this campaign in sites_. (int (4), NULL)	
SplitTestID	The ID of the Split Test this campaign is for. NULL or 0 if this campaign is not part of a Split Test. (int, NULL)	

## IyrCampaignParts

---

Primary key: PartID

Field Name	Description	Version Added
PartID	A unique, auto-incrementing identifier for this row (int (4), NOT NULL)	
CampaignID	Links to the identifier in IyrCampaigns. (int (4), NOT NULL)	
MailingID	Links to identifier in outmail_. (int (4), NOT NULL)	

## Deliverability

### IyrDAODefinitions

---

The IyrDAODefinitions table contains the patterns that ListManager uses to match SMTP responses during delivery

Area: 0 = INCOMING, 1 = SMTP send (smallint, NULL)  
PatternType: 0 = STRING, 1 = ROOTED\_STRING, 2 = REGEXP (smallint, NULL)  
SMTPResponseCode: the 3 digit smtp response code the pattern applies to (int, NULL)  
ClassificationCode: the CompletionStatusID code assigned to SMTP responses matching this pattern (int, NULL)  
Pattern: the pattern that is matched against the SMTP response text (varchar(255), NULL)

## **IyrDeliveryAttemptLog**

---

The IyrDeliveryAttemptLog is a log of all the individual connection attempts the ListManager makes. Typically only failures are logged

MyIP - integer value of the local IP address used for this delivery attempt (int NULL)  
MXIP - integer value of the remote IP address used for this delivery attempt (int NULL)  
MailStreamID - the ID of the MailStream used for this delivery attempt (int NULL)  
MemberLogId - ID of the related object from the table specified by InmailType, if any (int NULL)  
CompletionStatusID - CompletionStatusID value for this delivery attempt (int NULL)  
Category small - CompletionStatusID / 1000 (int NULL)  
Type small - CompletionStatusID % 1000 (int NULL)  
SMTPResponseCode small - the 3 digit smtp response code (int NULL)  
Time - the timestamp of this log entry (smalldatetime NULL)  
MailingID - ties to outmail\_.MessageID\_ (int NULL)  
MemberID - ties to members\_.MemberID\_ (int NULL)  
SendTry small - send attempt count for this recipient (int NULL)  
InmailType - "bounce" = IyrMemberBounceLog, "complaint" = IyrMemberComplaintLog (varchar(255) NULL)  
SMTPResponseText - the last line of text received from the remote SMTP server (varchar(255) NULL)  
ListID - ID of the list used for this mailing (int NULL)  
Email - Email address of the recipient (varchar(255) NULL)  
BodyFrom - the visible From: header (varchar(255) NULL)  
MailFrom - the envelope From: header (varchar(255) NULL)  
RcptTo - the intended recipient (varchar(255) NULL)  
FromDomain - the domain ListManager is sending from (varchar(255) NULL)  
ToDomain - the domain of the recipient (varchar(255) NULL)

## **Logging**

### **Summary of the "log\_" fields in ListManager**

---

The log\_ table keep a record of every email send out by ListManager, except single recipient mail such as subscription confirmations or hello documents. This data is mainly interesting to administrators but is also used by the Lyris ListManager billing program.

Primary key: LogID\_

Field Name	Description	Version Added
Body_	The body text of this log entry, if applicable (text, NULL)	
ByteCount_	The size of the message, in bytes. (int, NULL)	
Created_	Date log entry was created (smalldatetime, NULL)	
List_	Name of list this log entry is for, if applicable (varchar(60), NULL)	
LogID_	Unique log ID (int, identity, NOT NULL)	
OutmailID_	ID of the row in outmail_ that generated this log entry. (int, NULL)	
RecipientCount_	The number of recipients to receive this message. (int, NULL)	
Referer_	Name of the object this log entry is referring to (varchar(50), NULL)	
Site_	Name of site this log entry is for, if applicable (varchar(50), NOT NULL)	
Source_	Source module that is logging this ('ListManager list posting', 'ListManager autoresponder', 'ListManager digest posting', 'ListManager index posting'). (varchar(50), NOT NULL)	
SubsetID_	The ID of the subset used to create the message this log entries details. NULL or 0 if no subset used. (int, NULL)	
Title_	English title of this log entry description (refers to documents table) (varchar(200), NULL)	
UserName_	Person who caused this log (varchar(100), NULL)	

## IyrMemberBounceLog

---

The IyrMemberBounceLog table keeps track of information related to a bounce received via incoming SMTP

LogID - autogenerated ID (int, NOT NULL)  
ListID - relates to lists\_.ListID\_ (int, NOT NULL)  
MessageID - relates to inmail\_.MessageID\_ (int, NULL)  
RespondID - relates to respond\_.RespondID\_ (int, NULL)  
MailingID - relates to outmail\_.MessageID\_ (int, NULL)  
MemberID - relates to members\_.MemberID\_ (int, NULL)  
CompletionStatusID - the classification value of this bounce (int, NULL)  
Created - when the bounce occurred (smalldatetime, NOT NULL)

## IyrMemberComplaintLog

---

Complaints sent to the [whitelist complaint handler](#). Added in 8.1.

Field Name	Description	Version Added
CompletionStatusID	The numeric status value of the complaint (int, NULL)	Added in 10.0
LogID	Unique ID for this complaint. (int, identity, NOT NULL)	Added in 8.1
ListID	The list that received this complaint. (int, NOT NULL)	Added in 8.1
MailingID	The ID for the member that sent this complaint (int, NULL)	Added in 10.0

MemberID	The ID for the member that sent this complaint (int, NULL)	Added in 10.0
MessageID	The message that received this complaint. (int, NULL)	Added in 8.1
RespondID	The autoresponder ID that received this complaint. (int, NULL)	Added in 8.1
Created	The date/time this complaint was received. (smalldatetime, NOT NULL)	Added in 8.1

## Summary of the "lyrMetricEvents" fields in ListManager

This table stores data about performance for ListManager. Generally every minute aggregate data is saved into this table about events listed in the lyrPerformanceMetrics table. These can then be used to create charts or otherwise analyze performance.

Primary key: none

Field Name	Description	Version Added
MetricKey	The key for this event, from the lyrPerformanceMetrics table. (int, NOT NULL)	
Value	The actual data value. (int, NOT NULL)	
NodeID	The ID of the node that processed this metric event. (int, NOT NULL)	
EventTime	The time and date of this event (datetime, NOT NULL)	

## Summary of the "lyrPerformanceMetrics" fields in ListManager

This table stores data about performance metrics used by ListManager. Generally every minute aggregate data is saved in the lyrMetricEvents table for events listed in this table. These can then be used to create charts or otherwise analyze performance.

Primary key: MetricKey

MetricKey	An auto-numbering value to serve as a unique key for this table. (int, NOT NULL)
Description	A textual description of this metric. (varchar(255), NOT NULL)
ShortName	A short textual unique name for this metric. (varchar(12), NOT NULL)

## IyrRecipientTracking

---

This table is updated during the incremental and full report summaries. This table stores intermediate calculations for the report IyrReportSummaryData table.

Field Name	Description	Version Added
RecipientID	Reference to IyrCompletedRecips	9.2
MemberID	Reference to members_	9.2
MailingID	Reference to outmail_	9.2
OpenCount	Number of opens accumulated for this recipient	9.2
ClickCount	Number of clicks accumulated for this recipient	9.2
StreamCount	Number of streams accumulated for this recipient	9.2
TransCount	Number of purchases accumulated for this recipient	9.2
UnitCount	Number of units accumulated for this recipient	9.2
ForwardCount	Number of forwards accumulated for this recipient	9.2
SubAmount	Amount of purchases accumulated for this recipient	9.2
UnitCount	Adding columns to IyrRecipientTracking	9.2
SubAmount	Adding columns to IyrRecipientTracking	9.2
ForwardCount	Adding columns to IyrRecipientTracking	9.2
ContentFieldParamID	Create table IyrContentFieldParams	9.2

## IyrWebAccessLog

---

This table records access to the ListManager web GUI, as recorded by the ListManager web server.

This table was added in version 8.8.

Field Name	Description	Version Added
AccessDateTime	The date and time this page was accessed. (smalldatetime, NOT NULL)	Added in 8.8
RemoteIPAddr	IP address in dotted-octet string ("192.168.176.53") (char(15), NOT NULL)	Added in 8.8
UserName	Login name of ListManager user. (varchar(100), NOT NULL)	Added in 8.8
AdminType	What type of administrator this is. ("list", "site", "server"). (char(10), NOT NULL)	Added in 8.8
Url	The URL the admin requested. (varchar(1024), NOT NULL)	Added in 8.8
List	The name of the list logged into (varchar (60), NULL)	Added in 8.8

## Mail Streams

### IyrMailStreams

---

The IyrMailStreams table provides the names of the MailStream objects



MailStreamID - autogenerated ID (int, NOT NULL)  
IsDefault - whether this stream is the default one (char(1), NOT NULL)  
Description - Textual description of this MailStream (varchar(255), NULL)  
Name - Name of this MailStream (varchar(25), NOT NULL)

## lyrNodeAddresses

---

The lyrNodeAddresses table has an entry for each IP address detected for each node

IsAlive - if the IP address is currently available on the node (char(1), NOT NULL)  
NodeAddressID - autogenerated ID (int, NOT NULL)  
IPAddress - IP address in dotted-quad format (varchar(15), NOT NULL)  
NodeID - relates to lyrConfigNodeSettings.NodeID (int, NOT NULL)

## lyrStreamHasAddress

---

lyrStreamHasAddress contains associations between MailStreams and IP addresses on particular nodes

MailStreamID - The Mail Stream ID from lyrMailStream that is associated with the Node Address ID below (int, NOT NULL)  
NodeAddressID - The Node Address ID that points to the IP from a list of all IPs on all node in lyrNodeAddress (int, NOT NULL)

## lyrTableFieldMappings

---

lyrTableFieldMappings is used to assist the API in filtering operations

TableName - table being referenced (varchar(100), NOT NULL)  
DBFieldName - the field name as seen by the database (varchar(100), NOT NULL)  
MappedFieldName - the field name as used by the API (varchar(100), NOT NULL)

## Mail Queue

### Summary of the "lyrLookupCompletionStatus" columns in ListManager

---

This is a lookup table for the possible completion statuses.

Primary key: CompletionStatusID

Field Name	Description	Version
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**Added**

CompletionStatusID The unique key for this row (int, NOT NULL)  
Description The description of this completion status. (varchar(255), NOT NULL)

## Summary of the "lyrCompletedRecips" columns in ListManager

---

The lyrCompletedRecips table holds recipient rows for completed email, and notes whether mail was delivered successfully or unsuccessfully. Once no more attempts will be made to deliver this message to individual recipients, the row is moved from lyrActiveRecips to this table.

Primary key: RecipientID

Field Name	Description	Version Added
RecipientID	A unique, auto-incrementing identifier for this row (big int, NOT NULL)	
BounceMailingID	The identifier for the row in inmail_ that holds the bounce message for this recipient. (int, NULL)	
CompletionStatusID	The recipients final completion status, from the lyrLookupCompletionStatus table. (int, NOT NULL)	
Domain	The domain part of the recipient's email address. (varchar(250), NOT NULL)	
FinalAttempt	The time and date of the last attempt to deliver mail for this recipient. May be the same as FirstAttempt if only one attempt was made. (smalldatetime, NULL)	
FirstAttempt	The date and time that the first attempt was made to deliver to this recipient. (smalldatetime, NULL)	
MailingID	The mailing that this recipient should receive, from the outmail_ table. (int, NOT NULL)	
MailStreamID	The Mail Stream associated with this Recipient (int, NULL)	
MemberID	If this recipient is a member their identifier from the members_ table. (int, NULL)	
RecordCount	Support for lyrReportSummaryData (SmallInt/Default 1)	
SendTry	The number of attempts that have been made to deliver mail for this recipient. (tinyint, NOT NULL)	
TransactionLog	The textual details of the attempt to send to this recipient. Populated based on list settings. (text, NULL)	
UserName	The user name portion of the recipient's email address. (varchar(100), NOT NULL)	

## lyrSpfLevelDescription

---

This is a lookup table for possible SPF results.

Field Name	Description	Version Added
SpfLevel	The SPF results returned by ListManager's SPF check. (tinyint (1), NOT NULL)	
Description	The description of this SPF level.(varchar(255) NOT NULL)	

## Summary of the "inmail\_" fields in ListManager

The inmail\_ table hold messages received by ListManager. Every received message should be a row in this table, except for some bounce messages, if these are configured to not be saved. The data is saved as soon as it is received, and then is processed as resources are available. Once the message is processed its status is changed to 'done'.

Primary key: MessageID\_

2001000  
6070

Field Name	Description	Version Added
BeingProcessedBy_	The machine name that is currently processing this inmail record. For use in clustering. (varchar(25), NULL)	
Body_	The body of the message (text, NULL)	
ByEmail_	Was this current entry created by email, or by some other means, such as a script or web interface (bool)	
Created_	Date the message was entered in the queue (datetime, NULL)	
DeliverBefore_	After this time the message should not be delivered. (smalldatetime, NULL)	
DetectHTML_	Should this inmail detect HTML use. (bool)	
DocID_	DocID_ of content that this inmail message uses. Reserved for future use. (int, NULL)	9.2
DocType_	DocType_ of content that this inmail message uses. (varchar(20), NULL)	9.2
HdrAll_	The complete message header (text, NULL)	
HdrDate_	The 'date:' header (varchar(100), NULL)	
HdrFrom_	The 'from:' header (varchar(238), NULL)	
HdrFromSpc_	The 'from' header (varchar(200), NULL)	
HdrSubject_	The 'subject:' header (varchar(2001000), NULL)	
HdrTo_	The 'to:' header (varchar(200), NULL)	
List_	The list that this message belongs to (varchar(6070), NULL)	
MailStreamID_	The Mail Stream associated with this Mailing (int, NULL)	
MaxRecips_	For a list posting, the maximum number of recipients allowed to get this message. ListManager will remove any members so that this max is not reached. (int, NOT NULL)	
MessageID_	Unique message ID (int, identity, NOT NULL)	
ModerApp_	Has this message been moderation approved? (bool)	
NextAttempt_	Next time that inmail_ will be processed (smalldatetime,	8.95

	NULL)	
NodeID_	The identifier for this node, references into lyrConfigNodeSettings. (int, null)	8.0
NumFailures_	Number of times that processing this record has failed	8.95
Priority_	Current unused. (tinyint, NOT NULL)	
PurgeMess_	For a list posting, indicates that the posting should remove recipients who have received the following archived message ids. (text, NULL)	
SplitPartID_	The ID of the SplitTest this record is for. NULL or 0 if this record is not part of a splittest. (int, NULL)	
SplitTestID_	The ID of the SplitTest this record is for. NULL or 0 if this record is not part of a splittest. (int, NULL)	
Status_	Status of the message: processed (varchar(20), NOT NULL)	
SubsetID_	The ID of the subset sent to for this inmail. NULL or 0 if no subset was used. (int, NULL)	
SuppressionList_	List of email addresses (CRLF delimited) not to send this mailing. (text, NULL)	Added in 8.8
Title_	The title of this message (varchar(70), NULL)	
To_	The email address this message was sent to (varchar(200), NULL)	
TrackOpens_	Should opens of this inmail be tracked. (bool)	
Transact_	Transaction log for each record (text, NULL)	
Type_	Message type: list, command, error-mail, auto-refused, bad-to-address (varchar(10), NULL)	

---

## Summary of the "lyrActiveRecips" columns in ListManager

---

The lyrActiveRecips table holds recipient rows for mail sending. Each recipient has a row in this table while mail is being delivered to them. Once no more attempts will be made to deliver this recipient the mail message, the row is moved from this table in lyrCompletedRecips.

Primary key: RecipientID

Field Name	Description	Version Added
RecipientID	A unique, auto-incrementing identifier for this row (big int, NOT NULL)	
Domain	The domain part of the recipient's email address. (varchar(250), NOT NULL)	
FirstAttempt	The date and time that the first attempt was made to deliver to this recipient. (smalldatetime, NULL)	
FullName	The recipient's full name, if known. Copied from the members table for efficiency in mail merging. (varchar (100), NULL)	
MailingID	The mailing that this recipient should receive, from the outmail_ table. (int, NOT NULL)	
MailStreamID_	The Mail Stream associated with this Recipient (int, NULL)	
MemberID	If this recipient is a member their identifier from the members_	

	table. (int, NULL)
NextAttempt	When the next attempt should be made to deliver to this recipient. (smalldatetime, NOT NULL)
NodeID	The identifier of the node that is currently sending this recipient. For clustering purposes. (tinyint, NULL)
NodeSequence	An incrementing value used to ensure locking between nodes works properly. (int, NOT NULL)
SendTry	The number of attempt that have been made to deliver mail for this recipient. (tinyint, NOT NULL)
TransactionLog	The textual details of the attempt to send to this recipient. Populated based on list settings. (text, NULL)
UserName	The user name portion of the recipient's email address. (varchar(100), NOT NULL)

## Summary of the "moderate\_" fields in ListManager

---

The moderate\_ table holds messages that need to be moderated, or are set to be released at a particular time. When a message is received it will start with an inmail\_ record. If the message needs approval, the record will be copied to the moderate\_ table. When it is approved (if it is not also rescheduled) it is copied again to the inmail\_ table as an approved message.

Primary key: MessageID\_

2001000

Field Name	Description	Version Added
AutoApDate_	Date/time at which time this message is automatically approved (smalldatetime, NULL)	
Body_	The body of the message (text, NULL)	
ByEmail_	Was this current entry created by email, or by some other means, such as a script or web interface (bool)	
DeliverBefore_	After this time the message should not be delivered. (smalldatetime, NULL)	
DetectHTML_	Should this message detect HTML use. (bool)	9.2
DocID_	DocID_ of content that this inmail message uses. Reserved for future use. (int, NULL)	9.2
DocType_	DocType_ of content that this inmail message uses. (varchar(20), NULL)	9.2
GuiState_	Details about the state of the edit control in the GUI. (text, null)	
HdrAll_	The complete message header (text, NULL)	
HdrDate_	The 'date:' header (varchar(100), NULL)	
HdrFrom_	The 'from:' header (varchar(200), NULL)	
HdrFromSpc_	The 'from ' header (varchar(200), NULL)	
HdrSubject_	The 'subject:' header (varchar(2001000), NULL)	
HdrTo_	The 'to:' header (varchar(200), NULL)	

IsAutoApprove_	Whether or not this message will be auto-approved at a specific date/time. (bool, NOT NULL).	Added in 8.1.
List_	The list that this message belongs to (varchar(60), NOT NULL)	
MailStreamID_	The Mail Stream associated with this Mailing (int, NULL)	10.0
MaxRecips_	For a list posting, the maximum number of recipients allowed to get this message. ListManager will remove any members over this limit. If this field is not set, then there is no max. (int, NOT NULL)	
MemberID_	MemberID of the user who contributed this moderated message (int, NOT NULL)	
MessageID_	Unique message ID (int, Identity, NOT NULL)	
ModHdrDate_	If set, this moderated message should have its Date: header rewritten to be the date/time it is approved, removing the original Date: header stamp (char(1), NOT NULL)	
PurgeMess_	For a list posting, indicates that the posting should remove recipients who have received the following archived Message IDs. A space-separated list of IDs. (text, NULL)	
ReSubmit_	If set, means that when the message is approved, it should be resubmitted for automatic approval after so many hours (smallint, NOT NULL)	
Status_	Status of the message: new, processed (varchar(20), NOT NULL)	
SplitPartID_	The ID of the SplitTest this record is for. NULL or 0 if this record is not part of a splittest. (int, NULL)	
SplitTestID_	The ID of the SplitTest this record is for. NULL or 0 if this record is not part of a splittest. (int, NULL)	
SubsetID_	The ID of the subset used to create this message. NULL or 0 if no subset was used. (int, NULL)	
SuppressionList_	List of email addresses (CRLF delimited) not to send this mailing. (text, NULL)	Added in 8.8
SuppressionListCount_	Count of email addresses not to send this mailing. (int, NOT NULL).	Added in 8.8.
SynchronizeAfter_	If SynchronizeFirst_ is true, this is the oldest allowed date/time of the last synchronization. (datetime, NULL)	Added in 8.8
SynchronizeFirst_	Whether or not to ODBC synchronize the member list before sending mailing. (bool, 'F')	Added in 8.8
Title_	Optional title given to this posting -- can only be set independently of the message (ie with web posting or with 'moderate' commands (varchar(70), NULL)	
To_	The email address this message was sent to (varchar(100), NULL)	
TrackAllUrls_	Should URLs in this message be tracked. (bool)	9.2
TrackOpens_	Should opens of this message be tracked. (bool)	9.2
Transact_	The log of activity for this message. (text, NULL)	
Type_	Message type: unknown, command, error-mail, auto-refused, bad-to-address (varchar(20), NULL)	

## **Summary of the "outmail\_" fields in ListManager**

---

The outmail\_ table stores mail jobs that have been approved to be sent. Records that do not have any recipient left to deliver are automatically purged from outmail\_ based on the list setting for "Keep mailing and clickthrough data for how many days".

The outmail\_ table stores the message text and information needed to sent the message. The recipients who will receive this mail are stored initially in [lyrActiveRecips](#), and will be moved to [lyrCompletedRecips](#) as they are completed.

With subset postings it is possible to have recipients from multiple lists, but only one list is used for the purpose of mail merging. That is the value in the List\_ column.

Primary key: MessageID\_

Field Name	Description	Version Added
ArchiveMessageID_	Foreign key to the messages_ table where list postings are archived. (int, NULL)	Added in 8.95
Body_	The body of the message (text, NULL)	
CheckSum1_	A value to represent the content of the message body (int, NULL)	
CheckSum2_	A value to represent the content of the message body (int, NULL)	
CheckSum3_	A value to represent the content of the message body (int, NULL)	
CheckSum4_	A value to represent the content of the message body (int, NULL)	
Created_	Date the message was entered in the queue (datetime, NOT NULL)	
DeliverBefore_	After this time the message should not be delivered. (smalldatetime, NULL)	
DocID_	DocID_ of content that this message uses. Reserved for future use. (int, NULL)	9.2
DocType_	DocType_ of content that this message uses. (varchar(20), NULL)	9.2
From_	Who the email message is to be from (an email address) (varchar(200), NULL)	
HasCreatedMailingLinks_	char(1), NOT NULL	9.3
HdrAll_	The complete message header (Text, NULL)	
InmailBodySize_	The size of the message body from inmail_ (before modifications were made to outmail_) (int, NULL)	
InmailHdrFrom_	The HdrFrom value from inmail_. Used to detect cross-postings and duplicate postings. (varchar(238), NULL)	
InmailID_	The ID of the inmail record that created this entry. NULL or 0 if no inmail record exists. (int, NULL)	
List_	The list that this message belongs to (varchar(60), NULL)	
MailStreamID_	The Mail Stream associated with this Mailing (int, NULL)	10.0
MessageID_	Unique message ID (int, Identity, NOT NULL)	

Priority_	Currently unused. (tinyint, NOT NULL)	
SplitPartID_	The ID of the SplitTest this record is for. NULL or 0 if this record is not part of a splittest. (int, NULL)	
SplitTestID_	The ID of the SplitTest this record is for. NULL or 0 if this record is not part of a splittest. (int, NULL)	
Subject_	varchar(200), NULL	9.3
Title_	Title created by the author for this message. (varchar(70), NULL)	
To_	Who the message is destined to (an email address) (varchar(200), NULL)	
Transact_	Transaction log for each record (text, NULL)	
Type_	Message type: list, error-mail, owner-moderated-posting, owner-mail, debug, index, digest, mdigest, unknown (varchar(50), NOT NULL)	
SubsetID_	The ID of the subset used to create this entry. NULL or 0 if no subset was used. (int, NULL)	

## Members

### Summary of the "members\_" fields in ListManager

---

The members\_ table stores information about every list member on the server. Members are organized by list, and the same member may be on multiple lists. In this case there will be multiple rows in the members\_ table for a single email address, one for each list that the member has subscribed to.

Internet standards are that the email address should preserve the case of the name, but not make a distinction for comparisons. To support this, and to make searching for members fast, the email address is represented twice in the table: once in full case-sensitive form (the EmailAddr\_ column), and broken into case-insensitive pieces into columns UserNameLC\_ and Domain\_. ListManager will automatically populate these column when a new member is added, but if you want to add members to this table directly using SQL you MUST populate all the fields with the correct values. UserNameLC\_ and Domain\_ should hold the lower-case version of the portions of the email address, while the full case-sensitive version is stored in EmailAddr\_. UserNameLC\_ should hold the "user name" portion of the email address, i.e., everything to the left of the @ sign. Everything to the right of the @ sign should be stored in the Domain\_ column. Neither the UserNameLC\_ or the Domain\_ should contain an @.

Information about the state of the user (such as on-hold or unsubscribed) is stored in the members\_ table. This information allows ListManager to automatically handle administrative tasks such as putting user on hold, taking them off hold, purging users,



requiring approvals before joining, etc. Many of the exact options for these are set in the [lists](#) table.

Note that failed send attempts are recorded in the lyrCompletedRecips table: a total of the number of bounces for an address is no longer contained in the members\_ table.

The members\_ table has two fields that are not populated by ListManager, and are available for you to put any data desired. These are UserID\_ for up to 20 characters of text, and Additional\_ for unlimited text. Additional columns may be added to the table as long as the columns allow NULL or have default values. Adding columns that are NOT NULL will stop ListManager from being able to add new members, so is not recommended. Additional fields in the members table is an easy way to add information that is available for mail merging. However, it is also easy to create an SQL join to other tables, so that is generally a more flexible and efficient way to make your data available for mail merging. You should be careful about adding too many columns to the members table because as the table grows "wider" it will become slower and slower to get information from it, which will impact ListManager's ability to send mail quickly.

Primary key: MemberID\_  
 Unique index: Domain\_, UserNameLC\_, List\_  
 New index as of ListManager 9.1: IX\_members\_MemberType, index on (Lists\_,MemberType\_,DateJoined\_)

Field Name	Description	Version Added
Additional_	Place holder for any information you want to store associated with this member. (text, NULL)	
AppNeeded_	Can this person bypass approval to send messages? (bool, "F" is default)	
CanAppPend_	As a list admin, can this member approve pending (moderated) messages? (bool, "F" is default)	
CleanAuto_	Do not mark as 'held' this member if they bounce too much email (ie: let them bounce all they want) (bool, "F" is default)	
Comment_	Holds whatever comments the programmer wishes to put in. Useful as a user-defined 'additional info' field (Text, NULL)	
ConfirmDat_	Date the user was last sent a 'confirm' message (smalldatetime, NULL)	
DateBounce_	The date of the most recent bounce (smalldatetime, NULL).	
DateHeld_	Date the user was held (smalldatetime, NULL)	
DateJoined_	Date when person became a member of this list (smalldatetime, NULL)	
DateUnsub_	Date when person unsubscribed from this list (smalldatetime, NULL)	
Domain_	Set all to lowercase.(microsoft.com, for example). (varchar(250), NOT NULL)	
EnableWYSIWYG_	Whether this admin should have the HTML editor enabled by default. (bool, 'T' is default)	Added in 8.8
EmailAddr_	Full case-sensitive Internet email address (varchar(100), NOT NULL)	
ExpireDate_	Membership expires on this date (smalldatetime, NULL)	
FullName_	Full name of this person (varchar(100), NULL)	

IsListAdm_	Whether this person a list admin of this list (bool, "F" is default)	
List_	What list is this person a member of? (link to lists) (varchar(60), NOT NULL)	
MailFormat_	What format does the user want to receive mail, (M)ultipart (the default), (T)ext, or (H)TML. (char(1) NOT NULL)	
MemberID_	Unique member ID (int, identity, NOT NULL)	
MemberType_	What kind of member is this? ('normal', 'confirm', 'private', 'expired', 'held', 'unsub', 'needs-goodbye', 'needs-hello', 'needs-confirm') (varchar(20), NOT NULL)	
nameinteger	int(4), NULL	Added in 9.3
NoRepro_	Member should not receive a copy of their own posting (bool, "F" is default)	
NotifyErr_	For list admins: receive error mail? (bool, "F" is default)	
NotifySubm_	List admin: receive notification of pending moderated messages (bool, "F" is default)	
NumAppNeed_	How many more approvals does this person need before they can send messages unapproved? (smallint, NOT NULL)	
NumBounces_	The number of recent bounces this person has produced (smallint, NOT NULL). As of version 7.8, this column is no longer used.	
Password_	Password this person uses for restricted functions. The password is encrypted. (varchar(50), NULL)	
PermissionGroupID_	Permission group for this administrator. (int, NULL).	Added in 7.8.
RcvAdmMail_	For list admins: receives email messages destined for list admins (bool, "F" is default)	
ReadsHtml_	Does the mail recipient read HTML mail? (bool, default is "F")	
ReceiveAck_	Receive an acknowledgement when contributing a posting? (bool, "F" is default)	
SubType_	Kind of subscription. Defaults to "mail". (mail, digest, index, nomail, mimedigest) (varchar(20), NOT NULL)	
SyncCanResubscribe_	Used by ODBC synchronization when a member is not found in the remote DB. (bool 'T' or 'F', default is 'F')	Added in 8.8
SyncResubscribeType_	Used by ODBC synchronization when removing a member. Filled with member_.MemberType_.	Added in 8.8
UnsubMessageID_	The outmail_.MailingID_ of the message this member requested to unsubscribe via %%email.unsub%% or %%url.unsub%%	Added in 8.8
UserID_	Holds the user-definable 'user id' information, such as a key back to another table. (varchar(20), NULL)	
UserNameLC_	The user name (portion before the @) from the EmailAddr_ column, in lower case. (varchar(100), NOT NULL)	

# IyrMemberSubsets

---

Field Name Description Version Added

## Message Archives

### Summary of the "listmessagesmapping\_" fields in ListManager

This table provides NNTP with per-list unique incrementing message IDs. The messages\_ table has an auto-numbering field which is incremented for every new archive, regardless of which list it came from. Having large gaps in message IDs causes problems for many NNTP viewers, so this table provides a mechanism to make per-list IDs that will not have gaps between the messages for that list, unless messages are deleted.

Primary key: none

Field Name	Description	Version Added
ListID_	Reference to the ListID_ in table lists_ (int, NOT NULL)	
ListMessageID_	A unique key for use by NNTP. (int, NOT NULL)	
MessageID_	Reference to the MessageID_ in table messages_. (int, NULL)	

### Summary of the "messages\_" fields in ListManager

---

The messages\_ table stores the archive of all message postings. This data is required to search for messages. It is also used for NNTP and RSS access to messages.

Primary key: MessageID\_

Field Name	Description	Version Added
Body_	The body of the message (text, NULL)	
CreatStamp_	Date/time stamp this message was created (smalldatetime, NOT NULL)	
	Has this message been sent in a digest yet? (char(1), NOT NULL)	

Digested_	The complete message header (text, NULL)
HdrAll_	The 'date:' header (varchar(100), NULL)
HdrDate_	The 'from:' header (varchar(200), NULL)
HdrFrom_	The 'from ' header (varchar(200), NULL)
HdrFromSpc_	The 'subject:' header (varchar(1000), NULL)
HdrSubject_	The 'to:' header (varchar(200), NULL)
HdrTo_	
List_	The list that this message belongs to (varchar(60), NOT NULL)
MemberID_	Unique member ID of the member who posted this message (int, NOT NULL)
MessageID_	Unique message ID (int, primary key, identity, NOT NULL)
ParentID_	The message thread that this message is responding to, or the ID of this message, if this is the start of a thread. (int, NULL)
SubsetID_	The ID of the subset used to create this message. NULL or 0 if no subset used. (int, NULL)
Title_	Optional title given to this posting -- can only be set independently of the message (ie with web posting or with 'moderate' commands (varchar(70), NULL)

## Summary of the "uniquewords\_" fields in ListManager

---

The uniquewords\_ table defines a unique word and gives a numeric identifier for it. ListManager will index all words greater than one character and less than 30, and each word will appear just once in this table.

Primary key: WordID\_

Field Name	Description	Version Added
Word_	The unique word found in a message. (varchar(30), NOT NULL)	
WordID_	The numeric identifier for that word. (int, identity, NOT NULL)	

## Summary of the "wordmessage\_" fields in ListManager

---

The wordmessage\_ table creates a relationship between words in a message and the Message ID. This table is used for full text searching. When a message is received for a list that is set to keep message archives multiple entries are made into this table to

keep the relationship of which words occur in which messages. When a message is deleted, this table is automatically cleaned of entries for that message.

Primary key: none

Field Name	Description	Version Added
Context_	Was the word found in the (H)header, the (B)ody or in both (A)? (char(1), NOT NULL)	
ListID_	What list did this message belong to? Reference into lists_ table. (int, NOT NULL)	
MessageID_	What message ID was this message assigned to? References outmail_, but outmail_ records may be purged. (int, NOT NULL)	
WordID_	Reference to the word in the uniquewords_ table. (int, NOT NULL)	

## Permission Groups

### Summary of the "lyrPermissionGroups" fields in ListManager

The lyrPermissionGroups table holds the name and description of permission groups for web page permissions.

Primary key: GroupID

Field Name	Description	Version Added
GroupID	The primary key for this group (int, NOT NULL)	
GroupName	Name of group, (varchar (50), NOT NULL)	
GroupDescription	Description of group, (varchar (200) NOT NULL)	

### Summary of the "lyrPermissionGuiAttribs" fields in ListManager

The lyrPermissionGuiAttribs table holds the rules for each group in web page permissions.

Primary key: AttributeID

Field Name	Description	Version Added
AttributeID	Primary key for this rule (int, NOT NULL)	
PermissionGroupID	GroupID this rule belongs to (int, NOT NULL). Reference to GroupID on lyrPermissionGroups.	
SortOrder	Order in which this rule is applied (int. NULL)	
GuiPath	String to match against URI. Determines whether this rule matches varchar (255).	

Permission What to do if this rule matches A=allow, D=deny. Varchar (1) must be A or D.  
 AttributeDescription Description of this rule, varchar (100).

## Reporting

### IyrReportSummaryData

---

A table of mailing statistics aggregated by mailing number.

Field Name	Data Type	Size (Precision, Scale)	Nulls	Default	Description	Version Added
attempted	int	4				Added in 9.3
finish_date	datetime	16	X			Added in 9.3
id	int	4			Mailing id references outmail, deletes from outmail are not cascaded	Added in 9.0
EarliestPauseID	int	4	X		Id of the first paused completed recipient in last incremental update	Added in 9.0
EarliestSoftFailID	int	4	X		Id of the first soft fail completed recipient in last incremental update	Added in 9.0
FirstRecipientID	int	4	X		First completed recipient to contribute to aggregate stats	Added in 9.0
FirstClickID	int	4	X		First click to contribute to aggregate stats	Added in 9.0
active	int	4		(0)	Number of records for corresponding	Added in 9.0

paused	int	4	(0)	mailing that were in lyractiverecip last time it was checked	Number of 309 records in lyrcompletedrecips for this mailing	Added in 9.0
mailed	int	4	(0)		Number of records in lyrcompletedrecips for this mailing, less 309 records.	Added in 9.0
received	int	4	(0)		Number of 300 records in lyrcompletedrecips for this mailing	Added in 9.0
opens	int	4	(0)		Number of opens for this mailing	Added in 9.0
opens_firsts	int	4	(0)		Number of members for whom clicking on this mailing was their first	Added in 9.0
total_clicks	int	4	(0)			Added in 9.0
clicks_firsts	int	4	(0)			Added in 9.0
unique_clicks	int	4	(0)		Number of unique 'member id/mail id/ click id' events for this mailing	Added in 9.0
trans	int	4	(0)			Added in 9.0
trans_firsts	int	4	(0)			Added in 9.0
trans_amt	int	4	(0)			Added in 9.0
soft_fails	int	4	(0)		Number of 301 records in lyrcompletedrecips for this mailing	Added in 9.0
hard_fails	int	4	(0)		Number of 302 records in lyrcompletedrecips for this mailing	Added in 9.0
perm_fails	int	4	(0)		Number of 302 records in lyrcompletedrecips for this mailing	Added in 9.0
dns_temps	int	4	(0)		Number of 303 records in lyrcompletedrecips for this mailing	Added in 9.0
bad_doms	int	4	(0)		Number of 304	Added

					records in lyrcompletedrecip s for this mailing	in 9.0
bounces	int	4	(0)		Number of 305 records in lyrcompletedrecip s for this mailing	Added in 9.0
invalids	int	4	(0)		Number of 306 records in lyrcompletedrecip s for this mailing	Added in 9.0
mes_missings	int	4	(0)		Number of 307 records in lyrcompletedrecip s for this mailing	Added in 9.0
expirations	int	4	(0)		Number of 308 records in lyrcompletedrecip s for this mailing	Added in 9.0
skips	int	4	(0)		Number of 310 records in lyrcompletedrecip s for this mailing	Added in 9.0
aborts	int	4	(0)		Number of 311 records in lyrcompletedrecip s for this mailing	Added in 9.0
unsubs	int	4	(0)		Number of members who have clicked a unsubscribe link, or sent an unsubscribe e- mail	Added in 9.0
forwards	int	4	(0)		Number of members opening this message from different domains, not counting one domain which would correspond with the original recipient.	Added in 9.0
referrals	int	4	(0)		Number of sender records in the referrals table corresponding to this mailing	Added in 9.0
new_members	int	4	(0)		Number of receiver records in the referral table corresponding to this mailing	Added in 9.0
start_date	datetime	8	X		The date of the first completed	Added in 9.0



Created	datetime	8	X		recip record The created date copied from the outmail_ table	Added in 9.0
DeliverBefore	smalldatetime	4	X		copied from the outmail_ table (NULL for MSSQL only)	Added in 9.0
InmailBodySize	int	4	X		copied from the outmail_ table	Added in 9.0
Priority	tinyint	1	X		copied from the outmail_ table	Added in 9.0
SplitTestID	int	4	X		copied from the outmail_ table	Added in 9.0
SplitPartID	int	4	X		copied from the outmail_ table	Added in 9.0
SubsetID	int	4	X		copied from the outmail_ table	Added in 9.0
ListID	int	4	X		copied from the outmail_ table	Added in 9.0
InmailHdrForm	varchar	238	X		copied from the outmail_ table	Added in 9.0
OutmailFrom	varchar	200	X		copied from the outmail_ table	Added in 9.0
List	varchar	60	X		copied from the outmail_ table	Added in 9.0
Title	varchar	70	X		copied from the outmail_ table	Added in 9.0
OutmailTo	varchar	200	X		copied from the outmail_ table	Added in 9.0
Subject	varchar	200	X		copied from the outmail_ table	Added in 9.0
DescShort	varchar	200	X		copied from the outmail_ table	Added in 9.0
Type	varchar	50			copied from the outmail_ table	Added in 9.0
unique_opens	int	4	X	(0)		Added in 9.0
unique_trans	int	4	X	(0)		Added in 9.0
units					Number of units purchased by member who received this mailing	9.2
streams					Number of pages viewed by members who received this mailing	9.2
unique_streams					Number of recipients who viewed at least one page linked by this message.	9.2

survey_responses	Used for reports	9.2
complaints	count of unique users complaining for this mailing (int, NOT NULL)	9.2
pre10_complaints	user complaints from before version 10 (int, NOT NULL)	10.0
successes	successful deliveries (int, NOT NULL)	10.0
immediate_transients	undelivered recipients with at least 1 retry (int, NOT NULL)	10.0
final_technicals	undelivered recipients due to remove server issues (int, NOT NULL)	10.0
unknowns	recipients with unclassified errors (int, NOT NULL)	10.0
invalid_users	number of invalid email addresses for this mailing (int, NOT NULL)	10.0
blocked_contents	recipients rejected due to the content being sent (int, NOT NULL)	10.0
likely_blocked	users failed due to ISPs blocking the MailStream (int, NOT NULL)	10.0
internal_stops	undelivered recipients due to paused, skipped or aborted mailings (int, NOT NULL)	10.0
blocks	unused (int, NOT NULL)	10.0

## IyrMemberTracking

---

This table is updated during the incremental and full report summaries. It contains information for individual members aggregated across all mailings which have been

sent to them. It is meant as a ready source of member information which would otherwise require timely aggregations.

Field Name	Description	Version Added
MemberID	Reference to members_ table	9.2
firstOpenClickID	Reference to clicktracking table	9.2
firstOpenMailID	Reference to outmail_ table	9.2
firstThroughClickID	Reference to clicktracking table	9.2
firstThroughMailID	Reference to outmail_ table	9.2
firstStreamClickID	Reference to clicktracking table	9.2
firstStreamMailID	Reference to outmail_ table	9.2
firstTransClickID	Reference to clicktracking table	9.2
firstTransMailID	Reference to outmail_ table	9.2
opens	Number of opens accumulated for this member	9.2
clicks	Number of clicks accumulated for this member	9.2
streams	Number of streams accumulated for this member	9.2
trans	Number of purchases accumulated for this member	9.2
forwards	Number of forwards accumulated for this member	9.2
uniqueOpens	Number of unique opens accumulated for this member	9.2
uniqueClicks	Number of unique clicks accumulated for this member	9.2
uniqueStreams	Number of unique streams accumulated for this member	9.2
uniqueTrans	Number of unique purchases accumulated for this member	9.2
mailed	Number of messages sent to this member	9.2
received	Number of successfully sent to this member	9.2

## lyrRecipientIPtracking

This table is updated during the incremental and full report summaries. This table stores intermediate calculations for the report [lyrReportSummaryData](#) table.

Field Name	Description	Version Added
MemberID	Reference to members_	9.2
MailingID	Reference to outmail_	9.2
IPAddress	Used to calculate certain metrics uniquely	9.2

## lyrUnsummarizedClicks

Data in this table is waiting to be accumulated and stored in [lyrReportSummaryData](#), [lyrMemberTracking](#) and [lyrRecipientTracking](#).

Field Name	Description	Version Added
ClickID		9.2
IPAddress	Copied from corresponding clicktracking_ record	9.2
MemberID	Copied from corresponding clicktracking_ record	9.2
MailingID	Copied from corresponding clicktracking_ record	9.2
StreamWebPageName	Copied from corresponding clicktracking_ record	9.2
TimeClicked	Copied from corresponding clicktracking_ record	9.2

UrlID

Copied from corresponding clicktracking\_ record 9.2

## lyrUnsummarizedRecips

---

A table of recipients that have been completed, but have not been incorporated into the report summary data. Filled by triggers on the lyrCompletedRecips table.

**CAUTION** This is an automated table; do not insert or delete any records. Doing so will cause database errors.

<b>Field Name</b>	<b>Description</b>	<b>Version Added</b>
FinalAttempt	smalldatetime(16); NULL	Added in 9.3
RecipientID	Copied from RecipientID in lyrcompletedrecip (NULL for MSSQL only)	Added in 9.0
CompletionStatus ID	Copied from CompletionStatusID in lyrcompletedrecips	Added in 9.0
MailingID	Copied from MailingID in lyrcompletedrecips	Added in 9.0
FirstAttempt	Copied from FirstAttempt in lyrcompletedrecips	Added in 9.0
RecordCount	-1 or 1 depending on the trigger that inserted corresponding record	Added in 9.0
OpenCount	Number of opens accumulated for this recipient	9.2
ClickCount	Number of clicks accumulated for this recipient	9.2
StreamCount	Number of streams accumulated for this recipient	9.2
TransCount	Number of purchases accumulated for this recipient	9.2
UniqueOpen	1 if this recipient recently opened the message	9.2
UniqueClick	1 if this recipient recently clicked the message	9.2
UniqueStream	1 if this recipient recently viewed a page linked by the message	9.2
UniqueTrans	1 if this recipient recently purchased from a page linked by the message	9.2
Units	Number of units accumulated for this recipient	9.2
Forwards	Number of forwards accumulated for this recipient	9.2
Amount	Amount of purchases accumulated for this recipient	9.2
Unsubs	Number of unsubs accumulated for this recipient	9.2
MemberID	Reference to members_ table	9.2
ReferralCount	Number of referrals accumulated for this member	9.2
ReferredCount	Count of individuals referred accumulated for this member	9.2
SurveyResponseCount	Number of survey responses accumulated for this member	9.2
ForwardCount	Number of forwards accumulated for this member	9.2
UnsubCount	Number of unsubs accumulated for this member	9.2
UnitCount	Number of units accumulated for this member	9.2
SubAmount	Amount of purchases accumulated for this member	9.2

## SQL Queries

### Summary of the "subsets\_" fields in ListManager

---

The subsets table stores information about every subset created in the ListManager system. Subsets allow the list administrator to provide the SQL statement that is used to generate the member list for a posting. The SQL statement is broken into several parts in this table to allow it to be recombined in a generic way across multiple database vendors.

Subsets must be attached to a list, but a list may have multiple subsets.

Primary key: SubsetID\_

Field Name	Description	Version Added
ClauseAdd_	SQL statements that would be appended to the end of the SQL statement, such as 'group by' or 'having'. Currently unimplement. (text, NULL)	
ClauseAfterSelect_	Data to be added to the subset SQL after the select clause. Designed to allow Oracle user to provide a index hint. (text, NULL)	
ClauseFrom_	The SQL 'from' line. This is the list of all the tables participating in the SQL statement. (text, NULL)	
ClauseOrderBy_	The 'order by' SQL statement. This is for display purposes only. (text, NULL)	
ClauseSelect_	The 'select' line of the SQL statement. These are the columns to retrieve. (text, NULL)	
ClauseWhere_	The 'where' portion of the SQL statement. Defines the reductions and join rules used to retrieve data. (text, NULL)	
Desc_	A short description of the subset. (varchar(90), NULL)	
List_	The list that this subset is associated with. (varchar(60), NOT NULL)	
MailStreamID	The Mail Stream associated with this Segment (int, NULL)	10.0
Name_	The name of the subset. This is used as name-list@server for email postings. (varchar (60), NOT NULL)	
NumTestRecords_	The number of records to retrieve when testing the subset. (int, NOT NULL )	
AddWhereList_	Should ListManager automatically add the 'where' criteria to restrict this query to the list name that this subset is associated with, or can this subset get to data outside of this list. Default is T, meaning to add the where criteria and keep the subset restricted to the specific list. Setting this to F allows postings to every member on the server, so is very dangerous. (bool)	
AddWhereMemberType_	Should ListManager automatically add the 'where' criteria to restrict this query to 'normal' members? Default is 'T'. Normally ListManager would only send to 'normal'	

AddWhereSubType_	members, not to held or unsubscribed or other statuses. Setting this field to 'F' sends to every member type in the system, so is very dangerous. (bool) Should ListManager automatically add the 'where' criteria to restrict this query to 'mail' members? Default is 'T'. Normal postings only go to members who want normal 'mail' delivery, not those wanting digest or who have requested not to be sent mail. Setting this field to 'F' allows every member type to be sent to, so is very dangerous. (bool)
SubsetID_	Identifier for the subset. (int, identity, NOT NULL)
Type_	Whether this subset is "normal" or "triggered" (varchar(20), NULL)

## Internationalization

### Summary of the "translatekeys\_" fields in ListManager

This table stores the data that represents the strings that are translatable. Strings longer than 255 characters are specified using a tag rather than the string itself.

Primary key: TranslateKeyID\_

Field Name	Description	Version Added
TranslateKeyID_	An auto-incrementing ID field that uniquely identifies a record in this table. (int, identity, NOT NULL)	
Key_	The string used as the key to the translated value. Will generally be the actual string being translated but could also be a tag. (varchar(255), NULL)	
Type_	The type of this string. Only keys of type "text" are actually translated. The rest refer to images. (varchar(40), NULL)	
ImgPath_	For image types, this is the relative path to the image. (varchar(60), NULL)	

### Summary of the "translatelang\_" fields in ListManager

This table stores information about each translated language.

Primary key: TranslateLangID\_

Field Name	Description	Version Added
TranslateLangID_	An auto-incrementing ID field that uniquely identifies a record	

Name	in this table (int, identity, NOT NULL) This is the language name in English (varchar(60), NOT NULL)
Path_	This is the relative path to the translated images directory (varchar(60, NOT NULL)
Desc_	A text description. Informational only (varchar(120, NULL)
CharSetID_	A reference to mimecharsets_, this defines the charset used by this language (int, NULL)

## Summary of the "translatevalues\_" fields in ListManager

This table stores the translated values for each key and language.

Primary key: TranslateValueID\_

Field Name	Description	Version Added
TranslateValueID_	An auto-incrementing ID field that uniquely identifies a record in this table (int, NOT NULL)	
TranslateLangID_	A reference to translatelang_, this defines what language this translated value is in (int, NOT NULL)	
TranslateKeyID_	A reference to translatekeys_, this defines what key is used to access this translation (int, NOT NULL)	
IsValid_	When a translatekeys_ record is modified, any translatevalues_ records that reference it are flagged as invalid so that they can be retranslated (bool)	
Value_	This is the translated value for the specified language and key (text, NULL)	

## Referrals

### Summary of the "referrals\_" fields in ListManager

This table keeps information about referrals, aka, Send a Friend or Referrals.

Primary key: none

Field Name	Description	Version Added
SenderMemberID_	The member ID of the originator of the referral. (int, NOT NULL)	
SenderEmailAddr_	The email address the sender provided when initiating the referral, which could be different than the email address in the member record. (varchar(100), NULL)	
SenderIPAddress_	The IP address recorded from the sender at the time of referral. (int, NOT NULL)	

ReceiverMemberID_	The member ID of the 'friend' who should receive this referral. (int, NOT NULL)
ContentID_	The ID of the content to send as the referral. (int, NOT NULL)
RollupID_	(int, NOT NULL)
TimeSent_	The date and time the referral was sent. (smalldatetime, NULL)

## Summary of the "messengerelationship\_" fields in ListManager

This table tracks referral outmail objects to the message that first caused the referral action.

Primary key: none

Field Name	Description	Version Added
ParentID_	(int, NOT NULL)	
ChildID_	(int, NOT NULL)	

## Scheduled tasks

### Summary of the "lyrTaskScheduler" columns in ListManager

---

This table stores the current jobs scheduled to be run.

Primary key: ScheduleID

Field Name	Description	Version Added
LastFinishTime	The time at which the last instance of the task finished.	
LastRunTime	When was this task last run? (datetime, NULL)	
RunTime	When should this task be run? (datetime, NULL)	
ScheduleID	A unique, auto-incrementing identifier for this row. (int, NOT NULL)	
TaskID	What task should be run, from the lyrTaskDescription table. (int, NOT NULL)	
TaskData	Any integer data needed by the task, such as a mailing ID. (int, NULL)	



# Summary of the "IyrTaskDescription" columns in ListManager

---

This table stores the possible tasks that can be run on a scheduled basis by a node in the cluster.

Primary key: TaskID

Field Name	Description	Version Added
TaskID	The unique identifier for this task. (int, NOT NULL)	
AllowUserEdit	Can users change this scheduled task data? (bool)	
AllowUserView	Can users view this task information? (bool)	
Description	The textual description for this task. (varchar(255), NOT NULL)	
RescheduleMinutes	Sets value to 10 minutes for incremental Report Summary Update (int, NOT NULL)	
ShortDescription	A short description for this task. (varchar(50), NOT NULL)	

## Sessions

### IyrSessions

---

IyrSessionID - Primary key for the table SessionID (int, NOT NULL)  
SessionID - The user's session ID, that is stored in a cookie on the user's browser (varchar(50), NOT NULL)  
SessionData - The data associated with the session (varchar(500), NOT NULL)  
CreateTime - The time the session was created - this is used to occasionally prune old sessions (smalldatetime, NOT NULL)

## Split Tests

### IyrSplitTests

---

This table records information about each Split Test. The settings here are used to drive the mailings sent out as part of the split test, including the "Send to Rest" mailing.

Field Name	Description	Version
------------	-------------	---------

		<b>Added</b>
SplitTestID	Unique Split Test ID. (int, identity, NOT NULL)	Added in 9.0
Status	Status of the split test: processed	Added in 9.0
Created	Date the Split Test was created (datetime, NULL)	Added in 9.0
SentRestOn	Date the Split Test's "Send Rest" mailing was sent (datetime, NULL)	Added in 9.0
Method	The Sampling method: N or P (for Number or Percentage), processed (VarChar(1), NOT NULL)	Added in 9.0
SampleSize	The Number to Sample (% or #, based on method) (int, NULL)	Added in 9.0
TrackOpens	Whether to track opens of the test and send-rest emails. T/F (char, NOT NULL)	Added in 9.0
DetectHTML	Whether to detect HTML in the test and send-rest emails. T/F (char, NOT NULL)	Added in 9.0
RecencyWhich	Recency Method, if any (m,f,e for more than, fewer than, or equal to) (char, NULL)	Added in 9.0
RecencyDays	Recency Day count to be used in comparison, based on RecencyWhich (int, NULL)	Added in 9.0
RecencyNumberOfMailings	Recency Mailings count to be used in comparisons for Recency restriction enforcement (int, NULL)	Added in 9.0
SendRestContentID	ID of the winning content (int, NULL)	Added in 9.0
PurgeMess	List of Message IDs to purge from mailing, if any (text, NULL)	Added in 9.0
SuppressionList	List of emails to suppress from the list, if any (text, NULL)	Added in 9.0
SuppressionListCount	Count of the emails in the Suppression List (int, NULL)	Added in 9.0
TrackAllUrls_		

## **IyrSplitTestMetricsRank**

---

Automatically determines the winner of a Split Test, and sorts the parts accordingly. Currently not used in favor of clicking columns for sort order.

<b>Field Name</b>	<b>Description</b>	<b>Version Added</b>
SplitMetricsRankID	Unique ID for metrics ranking. (int, NOT NULL)	Added in 9.0
SplitTestID	ID of the Split Test this is a part of. (int, NOT NULL)	Added in 9.0
MetricID	ID of the metric being ranked. (int, NOT NULL)	Added in 9.0
Ranking	Overall priority/ranking. (int, NULL)	Added in 9.0

## **IyrSplitTestParts**

---

Each part of a Split Test is represented by one of these records. The values stored here are used to drive the actual mailing at the time it is queued up for sending.

Field Name	Description	Version Added
SplitPartID	Unique Split Part ID. (int, NOT NULL)	Added in 9.0
SplitTestID	ID of the Split Test this is a part of. (int, NOT NULL)	Added in 9.0
Sequence	Sequence Number (Part 1, 2, 3, etc), for consistency in ordering. (int, NULL)	Added in 9.0
SegID	Segment this part is targeted to (int, NULL)	Added in 9.0
SegList	List name this test is under (VarChar(60), NULL)	Added in 9.0
SegTitle	Name of the segment targeted (all of list, or specific segment) (VarChar(200), NULL)	Added in 9.0
ContentID	ID of the Content used for sending this part (Int, NOT NULL)	Added in 9.0

## Surveys

### lyrSurveyResponseAnswers

---

This table stores the responses to a specific question in a survey. Every survey response will have one row in the lyrSurveyResponse table, and potentially multiple rows in this table, one for each question in the survey.

Primary key: ResponseID, QuestionID, AnswerID

Field Name	Description	Version Added
ResponseID	The identifier of the response from the lyrSurveyResponse table. (int, NOT NULL)	Added in 7.8
AnswerID	The identifier of the answer from the lyrSurveyAnswers table. (int, NOT NULL)	Added in 7.8
QuestionID	The identifier of the question from the lyrSurveyQuestions table. (int, NOT NULL)	Added in 7.8
FreeFormAnswer	Any free form response to a question. (text, NULL)	Added in 7.8

### Summary of the "lyrSurveyResponse" columns in ListManager

---

This table stores the responses to a survey. Every survey response will have one row in this table, and potentially multiple rows in the lyrSurveyResponseAnswer table, one for each question in the survey.

Primary key: ResponseID

Field Name	Description	Version
------------	-------------	---------

**Added**

ResponseID	An auto-incrementing unique identifier (int, NOT NULL)
MailingID	If this survey was sent via email, what was the mailing ID, from the outmail_ table? (int, NULL)
MemberID	If this response was from a member, what is their member ID, from the members_ table? (int, NULL)
ResponseTime	When was this response received? (smalldatetime, NOT NULL)
WebDocID	The ID from the lyrWebDocs table that represents this survey in HTML form. (int, NOT NULL)
Weight	The relative weight of this response. (int, NULL)

## Summary of the "lyrSurveyQuestions" columns in ListManager

---

This table describes a question on a survey.

Primary key: QuestionID

Field Name	Description	Version Added
QuestionID	An auto-incrementing unique identifier (int, NOT NULL)	
UserQuestionNumber	What question number should this be for the user? (int, NOT NULL)	
UserPartNumber	If this is a question that has multiple answers, such as a matrix, what part number is this of the question? (smallint, NOT NULL)	
QuestionText	The text of the question. (varchar(255), NOT NULL)	

## Summary of the "lyrSurveyAnswers" columns in ListManager

---

This table describes a possible answer to a question, such as "Strongly agree".

Primary key: AnswerID

Field Name	Description	Version Added
AnswerID	An auto-incrementing unique identifier (int, NOT NULL)	
AnswerText	The text of this answer. (varchar(255), NOT NULL)	
AnswerCollectionID	If this answer is part of a collection, such as a matrix, what is the collection ID from the lyrSurveyAnswerCollections . (int, NULL)	
AnswerOrder	The order that the answers should be provided to the user. (smallint, NOT NULL)	
AnswerWeight	The weight that this answer should be considered. Some questions have much more importance, so this allows the answer to be considered more or less important than other	

answers. (int, NULL)

## Summary of the "IyrSurveyAnswerCollections" columns in ListManager

---

This table associates an integer identifier with a group of answers to a single survey question. This is used for questions that allow multiple answers, such as a matrix.

Primary key: CollectionID

Field Name	Description	Version Added
CollectionID	An auto-incrementing unique identifier (int, NOT NULL)	
CollectionShortName	A short name to refer to this row, as an alternative key. (varchar(15), NOT NULL)	
CollectionDescription	A textual description of this collection. (varchar(255), NULL)	

## Web Documents

### Summary of the "IyrWebDocs" columns in ListManager

---

The IyrWebDocs table holds HTML pages that are returned to a user's web browser. These documents are currently used only for Member Profile and Referral forms.

Primary key: WebDocID

Field Name	Description	Version Added
Body	This is the content of the HTML page. (text, NULL)	
Descript	A description for this HTML document. This is only informational and is only visible to administrators in the web interface. (varchar(120), NULL)	
GuiState	Data about the state of the text control when it was edited. (text, null)	
IsReadOnly	Indicates whether this is a document that is populated during database creation or upgraded and can be overwritten during future upgrades. (bool)	
IsTemplate	Indicates whether this is a template. (bool)	
ListID	A foreign key into the lists_ table. This indicates what list this document is associated with. If this is NULL and SiteID is NULL then this is a server HTML document. (int, NULL)	
SiteID	A foreign key into the sites_ table. This indicates what site this document is associated with. If this is NULL and ListID is NULL then this is a server HTML document. (int, NULL)	

Title	The title of this HTML document. This is only used by the administrator's web interface for identification and is not visible to the user. (varchar(60), NOT NULL)
WebDocID	A unique ID for this record (int, identity, NOT NULL)
WebDocTypeID	A foreign key into the lyrLookupWebDocTypes table. This indicates what type of HTML document this is. (int, NOT NULL)

## Summary of the "lyrLookupWebDocTypes" fields in ListManager

---

The lyrLookupWebDocTypes table holds type information that is referenced by the lyrWebDocs table.

Primary key: WebDocTypeID

Field Name	Description	Version Added
WebDocTypeID	A unique ID for this record (int, identity, NOT NULL)	
Title	The title of this document type. This is only used by the administrator's web interface for identification and is not visible to the user. (varchar(60), NOT NULL)	
Descript	A description for this document type. This is only informational and is only visible to administrators in the web interface. (varchar(120), NULL)	

## EmailAdvisor

### lyrPiperMail

---

This table is used for EmailAdvisor reports.

Field Name	Description	Version Added
MessageToken	A system generated key for this message (varchar (50) NOT NULL)	Added in 8.5; modified in 8.9 to not be the primary key.
OutmailID	The outmail_.messageid_ associated with this message (int (4) NULL)	Added in 8.5
Blacklist	Should blacklist analyzer reports be run? (bool, 'F')	Added in 8.5
Compatibility	Should inbox snapshot reports be run? (bool, 'F')	Added in 8.5
Deliverability	Should deliverability tests be run? (bool, 'F')	Added in 8.5
ContentAnalyzer	Should spam analysis tests be run? (bool, 'F')	Added in 8.5

# IyrPiperSeeds

---

Internal cache of EmailAdvisor seed email addresses.

<b>Field Name</b>	<b>Description</b>	<b>Version Added</b>
PiperSeedID	Unique ID for this seed (int, identity, NOT NULL)	Added in 8.1
SeedTypeID	Type of this seed email address (varchar(15), NOT NULL)	Added in 8.1
EmailAddr	Email address of this seed (varchar(100), NOT NULL)	Added in 8.1
LastUpdated	Date/time this seed was last updated (smalldatetime, NULL)	Added in 8.1

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