

## Creating a Post-Event Follow-Up E-mail

Here's the scenario: You're going to a trade show or similar event, and you're going to be collecting contact information from everyone you meet. Afterward, you'll want to send a personalized e-mail to each person, thanking them for their interest and following up on particular points of your conversation. This could be a daunting task if you're using a regular e-mail program. With the DMC and a simple Excel spreadsheet, you can complete this work quickly and easily.

### Recording Information in a Spreadsheet

1. In Excel, enter your column headings, including the following:

**E-mail address**

The e-mail address is required for two reasons: (1) to send the e-mail and (2) to serve as the identifier for each contact record when you upload your contact list into the DMC.

**First name**

You can set up your e-mail to address each contact by his/her first name.

**Company**


You can use a variable tag to pull the correct company name into each e-mail message.

**Notes**

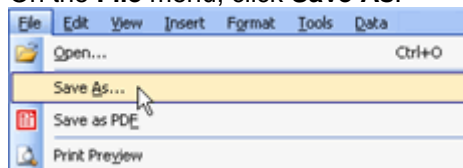
Write your notes as if you are addressing the contact person. Your notes will be used within the body of your e-mail.

**Any other information that you want to include**

All information in the contact record can be used to personalize your message.

-  You can use our spreadsheet to get started.

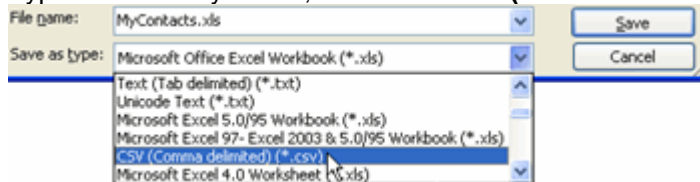
2. Enter the information for each contact, and be sure to include detailed notes, written as if you are addressing the other person. For example: "We discussed your business expansion and your need to make resources accessible to your reps in the field."
3. Include a record for yourself, using the same e-mail address that you use when you log on to the DMC. This will help you to check your message when you send yourself a preview e-mail from the DMC.
4. On the **File** menu, click **Save As**.



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5. Type a name for your file, and select **CSV (Comma delimited) (\*.csv)** as the file type.



6. Click **Save**. If any confirmation messages appear, click **Yes** or **OK**.

## Uploading Your Contact List in Your DMC

1. Log on to your DMC.
2. On the **Main Menu**, click **Contact Management Center**.  
—OR—On the **Admin Panel Main Menu**, click **Contact Management Center** on the left side.

3. Click **Add Contacts**, on the right side of the page.



4. Under **Import a .csv file of contacts**, click **Browse**.



5. When the Choose File window appears, find your file, click it, and then click **Open**.



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- Click **Go**.



The Contact Upload page appears, showing sample data from your file.

(Ignore) ▼	(Ignore) ▼	(Ignore) ▼
E-Mail	First Name	Last Name
samplecustomer1@nmgemailtest.com	Anthony	Gill
samplecustomer2@nmgemailtest.com	Kelly	Aaron
samplecustomer3@nmgemailtest.com	Julie	Abbey
samplecustomer4@nmgemailtest.com	Steve	Aceve
samplecustomer5@nmgemailtest.com	Rudy	Adame
samplecustomer6@nmgemailtest.com	C.	Adamek
samplecustomer7@nmgemailtest.com	Mora	Adams
samplecustomer8@nmgemailtest.com	Thomas	Adams
samplecustomer9@nmgemailtest.com	R. E.	Adams

- Use the drop-down lists at the top of the table to map your data to the fields in the system. Map the e-mail address to the **E-mail Address** field, map the first name to the First Name field, and so on. Do not leave **Ignore** in a field, unless you want the data to be left out of the import.

- Below the table, type a name for your contact group.

Add contacts to group: (Master Group) ▼ or to a new group called: Trade Show Attendees

- Keep the default selections.

- Ignore the first row (Often will contain header information)
- Send me a receipt when all of my contacts have been imported. E-Mail: laureib@newmediagatew.
- Pre-check for duplicates. (Note: Will increase processing time. Not recommended for CSVs of 1,000 or more)

- Click **Upload Data to Groups**.

- Wait until you receive a notification, confirming that your contacts have been uploaded. It may take some time for the system to finish uploading all of the contact data.

- i** You can view a list of your contact groups, and switch between the groups, by clicking **Change Contact Groups**.



## Creating Your E-mail

1. Use the drop-down lists to choose a template or a saved e-mail that you want to use for this e-mail campaign.

Category	Folder	Template
Template Emails	Public Folder	#9: default

2. Click **Select Template**, in the lower left corner of the page (you may have to scroll down). The Send E-mail page appears.
3. Click **Customize HTML**. Enter and format your text, using the variable tags for the contact fields that you want to include.
  - ❗ To get started, copy and paste the text from our text file. Use the **[first\_name]**, **[company]**, and **[notes]** variable tags. When you send your e-mail, the system will pull the personal contact information from the contact records that you uploaded.
4. Insert pictures, and add links, as needed.
5. When you are finished entering your message, copy and paste all of your text into the **Plain Text** area.
  - ❗ Type the URLs for any links that you added.
6. Modify your **Sender's Name** and **Sender's E-mail** if needed.

### 2. Customize E-mail Header

Sender's Name: (The sender's name as you would like it to appear visually)

Laurel Beason

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Sender's e-mail Address: (The address a recipient may reply to)

laurelk@newmediagateway.com

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Subject of e-mail:

Message from NMG MailCenter Demo

7. Enter your subject line in **Subject of e-mail**. Avoid unusual punctuation and words that might trigger spam filters.
8. Scroll down to the bottom of the page, type a name for this e-mail, and click **Save to My Folder**.
  - ❗ You will be able to re-use this e-mail in the future; it will be stored in Saved E-mails, My Folder on the Select HTML Template page.

Save this e-mail as a Template:

9. Scroll down, and click **Send Preview**. The system will send a preview copy of the e-mail to your e-mail address.
  - ❗ The preview will show your own contact information.
10. After reviewing your preview, make changes, as needed, in the **Customize E-mail** area.

11. **Select Recipients:** Under **Send To All Contacts In Which Groups**, click the name of the group that you uploaded previously.

### 3. Select Recipients

**Send To Individual Contacts:**  
(One address per line or separate by commas.  
You may send to individuals without selecting a group.)

**Send To All Contacts In Which Groups:**

- ANS-Medical
- BB
- Boca-Luxury
- Breakers
- CMS Demo
- CMS Team
- CopyTest-ANS
- CVB
- DMC Admins 021207
- DMC Admins 060206
- DMC Admins 073106
- DMC Admins 081206

My Address Book

12. **Customize Options:** Select options, as needed, or ignore this area to keep the default options.
13. Click **Send To Target Recipients**.
14. When the success message appears, click **Back to Main Menu**. Do not click the **Back** button on the Internet Explorer toolbar.