



## STAR Desktop Mailings



Business departments BusinessSoftware & LifestyleSoftware

### Document information

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We are always there for you !

## Welcome

### **Thank you very much for purchasing our software !**

We are pleased that you decided for one of our products. It's our passion to develop powerful software and exciting games.

#### **[About this manual]**

This handbook will help you to become more familiar with our software.

It will explain some of the concepts behind our software and introduce you to the intuitive interface and its fundamental functionality.

Anyway, you can also explore the software of your own - it was our goal to make all features simple and intuitive for everybody.

This user guide contains the following information:

- ☆ Installation and configuration instructions.
- ☆ Detailed information about workflows and feature sets.
- ☆ Overview about available support services and contact details.

We hope you enjoy reading !

The STAR ENTERPRISE software engineering team.

## The first time...

### **The software is ready-to-use instantly - no complex installation required !**

A detailed quick-start guide for this product and other useful expert tips are available on our website: [www.starenterprise.com/en/customer-service/software/](http://www.starenterprise.com/en/customer-service/software/)

Please have a look at the ReadMe file included with each software package. It contains latest information and will assist you with the first steps to use the software.

## Fundamentals - before you start

### [Sample data set]

In order to make it easier for you to become familiar with STAR Desktop Mailings, a sample data set is available (like user profiles, archive entries and configuration settings).

Use it as **playground for your first experiences** with STAR Desktop Mailings.

### [Mail account]

STAR Desktop Mailings requires **access to its own dedicated e-mail account** (POP and SMTP) to send out mailings and to handle self-service remote user management tasks.

**Important note:** This e-mail account should be solely used by STAR Desktop Mailings; accessing it by other means may lead to unexpected results and data loss.

### [Restrictions by service providers]

Some Internet service providers and webhosters do not allow using their systems for mass mailing distribution. Please contact your provider for details.

### [Installation and operation]

STAR Desktop Mailings can be used on any desktop PC or compatible device. For continuous operation (24/7/365), it should be installed on a server (e.g. virtual machine).

If you are using the **self-service remote user management** or the **built-in scheduler**, ensure to **run the software at least once a day**.

Tip: On a desktop computer, use the autostart feature of your operating system to load STAR Device Monitor automatically when booting your PC.

## Fundamentals - text vs. HTML

**Plain text mailings** are compatible with all e-mail clients. Special characters and symbols can be used for text formatting and highlighting (to point out headlines, to create lists, etc.).

**HTML-formatted mailings** use a sub-set of HTML (no JavaScript, no forms, no plug-ins), depending upon the mail client.

HTML mailings design tip: Implement your layout by using a table-based structure with a sequence of sliced images, containing the graphical reproduction of the contents.

### [HTML mailing assistant]

By using the **built-in assistant** (click "Open assistant..." button at the HTML toolbox), you can create appealing mailings without the need to write one single line of code.

### [Note on attachments]

Consider that some people may only have a slow Internet connection. For this reason, you should **limit the size of attachments** to not exceed 2 MB. Better add download links !

## Fundamentals - data encryption and password protection

STAR Desktop Mailings uses **strong AES-128 encryption** to hide its internal databases from prying eyes. And a **password protection** restricts access to the user interface.

By default, data is encrypted using a hardcoded encryption key and password protection is turned off. You can change this behaviour by **setting an individual password**.

The individual password is requested every time STAR Desktop Mailings launches.

Note on backups: Please consider that restored backups may use a different password.

### Emergency password reset

Please keep your password on a safe place, because there is absolutely no way to recover lost passwords. Remember: If you forget your password, your data is lost, too.

Anyway, it's possible to reset the internal databases to their factory defaults by deleting the directory `./workspace` (located within your application folder).

## Fundamentals - tips & tricks

### [User profiles]

- The **profile quality indicator** is a score that shows the reliability of message delivery. It ranges from 0° (insufficient, many undeliverable messages) to 100° (excellent) and is part of the "Status" column on user profile table.
- **User profile status "disabled"**: The profile will not receive any mailings, but is available for self-service remote user management.
- **User profile status "blocked"**: The profile will not receive any mailings and is not available for self-service remote user management.

### [Mailings]

- If you wish to **keep a mailing-in-work** for later access, save it as a template.
- Before you officially post a mailing, **send a preview to the administrator** to ensure that anything looks as desired (especially when using individualised contents).

### [Mailing lists]

- Use "internal" flag for **closed-user groups** (to disable self-service remote user mgt.).

### [Mailing archive]

- The archive contains **processed (scheduled) mailings** only; user-initiated tasks and manual messages are not archived.
- **Select an entry to view some statistics**. Text in red colour: Some recipients failed to receive the mailing; text in green colour: Incomplete mailing, please resume delivery.

## Configuration - set up your mail account

Before sending your first campaign, you need to **set up a dedicated e-mail account** and **do some other configuration stuff**.

New to STAR Desktop Mailings ? Please read the chapter "Fundamentals" first.

### [Access the software preferences window]

Click on the preferences button (or press F4 key) to **open the preferences window**.

"X" (or a red indicator) marks mandatory settings.

"✓" (or a yellow/green indicator) marks optional settings.

### [Incoming / Outgoing mail server]

On the preferences window, move to the first tab and enter your **e-mail account details** (note that passwords are usually handled case-sensitive).

The e-mail address provided must be the main address assigned to the used mail account (please avoid alias names).

If checking the mail server communication fails (or takes more than 20 seconds), please adjust your settings or have a look at the software health report for logged server error messages (see "Administration" menu).

### [Administrator]

Now move to the second tab of the preferences window.

The **administrator e-mail address** is used to send previews of mailings and some other stuff. It's required to set and must not link to the e-mail account used to send mailings.

**You're done ! :-)**

## Individualised mailings - the basics

### [Contents from user profiles and context-sensitive elements]

Mailings can contain **individual contents based upon the user profile records**.

Placeholders (so-called "**command tags**") are inserted into the e-mail subject and body.

During processing, found **command tags are replaced with matching contents**. If there is no content available for a tag, it will be removed (duplicate space chars are cleaned up).

### [How to insert command tags]

Please use the **contextual menu provided by the text input fields**:

Click on the right mouse button while the mouse pointer is placed at the position you want to insert the tag (alternatively: use keys CTRL or ALT on systems with one mouse button).

Note: Command tags are case-sensitive and their availability depends on the message type (see tags listed in the contextual menu of the concerned text input field).

### [Command tags at a glance]

#### Data from user profile records

```
<.EmailAddress> <.Salutation> <.FirstName> <.LastName>
<.CustomFieldx> <.Language>
```

#### Data from mailing list records

```
<.ListLabel> <.ListDescription> <.ListJoinDate>1]
<.SubscribedLists>2] <.OptInLists>2] <.OptOutLists>2]
1] Format: YYYY-MM-DD | 2] Lists separated by comma.
```

#### Date and time stamps

```
<.LocalShortDate> <.LocalLongDate> <.LocalShortTime>
<.LocalLongTime> <.SQLDate>3] <.SQLDateTime>4] <.ProfileJoinDate>3]
<.ProfileLastUpdateDateTime>4]
3] Format: YYYY-MM-DD | 4] Format: YYYY-MM-DD HH:MM:SS
```

#### Other fields

```
<.CouponCode>5] <.AdminEmailAddress> <.SystemMailAccountAddress>
<.BasicProfileText>6] <.BasicProfileHTML>7]
5] As set in preferences. | 6] User profile summary, pure text. | 7] User profile summary, HTML.
```

#### Special command tags used in system mails only

```
<.OptInConfirmLink> <.OptInConfirmSubject> <.OptOutConfirmLink>
<.OptOutConfirmSubject> <.RemoveFromListLink>
<.RemoveFromListSubject> <.ShowProfileLink> <.ShowProfileSubject>
<.DeleteProfileLink> <.DeleteProfileSubject> <.CommandErrors>8]
8] Human-readable error messages. | See sample settings for details.
```

## Individualised mailings - custom text modules

### [Individual text modules using conditional statements]

Insert custom text modules depending upon the value of specific command tags by using conditional statements.

Custom text modules may contain command tags for creating individualised contents (nested conditional statements are not supported).

Tip: Create conditional statements on the fly with the **built-in assistant**. See contextual menu of the text input fields (click on the right mouse button or CTRL/ALT key on systems with one mouse button).

#### Scheme of a simple if/then statement:

```
<IF <.CommandTag> OPERATOR "Value" THEN>
...
</IF>
```

If the condition is true, the text module . . . will be inserted into the message.

#### Scheme of if/then/else statements:

```
<IF <.CommandTag> OPERATOR "Value" THEN>
...
<ELSE>
...
</IF>
```

If the condition is true, the first text module will be inserted into the message, otherwise the text module followed by <ELSE>.

#### Scheme of connected if/then statements:

```
<IF <.CommandTag> OPERATOR "Value" LOGCON <.CommandTag> OPERATOR
"Value" THEN>
...
</IF>
```

The logical connector LOGCON combines two conditions. If the final result is true, the text module . . . will be inserted into the message.

#### Scheme of connected if/then/else statements:

```
<IF <.CommandTag> OPERATOR "Value" LOGCON <.CommandTag> OPERATOR
"Value" THEN>
...
<ELSE>
...
</IF>
```

The logical connector LOGCON combines two conditions. If the final result is true, the text module . . . will be inserted into the message, otherwise the one followed by <ELSE>.



**Individualised mailings - custom text modules (continued)****[Available operators (referred to as OPERATOR in the schemes)]**

CONTAINS	contains (a partial string)
NOT CONTAINS	does not contain (a partial string)
EQUAL	matches, is equal to
NOT EQUAL	does not match, is not equal to
GREATER THAN	greater than
LESS THAN	less than
IS EMPTY	field has no content
MATCH REGEX	matches the pattern (regular expression)

**[Available logical connectors (referred to as LOGCON in the schemes)]**

&&	AND (both conditions must match)
	OR (at least one condition must match)
	XOR ("exclusive or", only one condition must match)

**[Examples]**Query the gender as stored in a custom field

```
<IF <.CustomField1> EQUAL "female" THEN>
For your digital lifestyle... visit www.digitallifestyle.eu !
</IF>
```

Query the year of birth as stored in a custom field

```
<IF <.CustomField2> GREATER THAN "1994" THEN>
This month's special: The new taste of spirits !
<ELSE>
This month's special: Buy one soft drink, get the second for free !
</IF>
```

Look for an empty field

```
<IF <.CustomField3> IS EMPTY "TRUE" THEN>
Get worldwide, fast mobile Internet access - the easy way.
<ELSE>
Upgrade your mobile Internet access plan today...
</IF>
```

```
<IF <.CustomField3> IS EMPTY "FALSE" THEN>
Upgrade your mobile Internet access plan today...
<ELSE>
Get worldwide, fast mobile Internet access - the easy way.
</IF>
```

Query two optional fields (connected statements)

```
<IF <.CustomField4> CONTAINS "1" && <.CustomField5> MATCH REGEX
"(premium)|(fan)" THEN>
For true music lovers only - our unlimited music flatrate.
</IF>
```

**Individualised mailings - custom text modules (continued)****[Important notes]**

- Use capital letters for keywords and operators. Condition values are case-sensitive.
- The operator `MATCH REGEX` performs a pattern search on the field's content using regular expressions (based upon Perl compatible regular expressions, PCRE).

Hardcoded options for regular expressions: Non-greedy, case-sensitive; period character "." matches everything except a newline.

- The operator `IS EMPTY` allows only two values: `TRUE` (match) or `FALSE` (no match).
- Invalid conditional statements (provided that they have been recognized), will not be processed but removed entirely from the message.

**[Validation of individualised mailings]**

Send a preview before finally posting your mailing to the list !

This will check all included command tags and conditional statements to prevent logical errors; the result is mailed to the e-mail address of the administrator.

Possible results for command tags:

- Valid tags are amended by the string "Okay".
- Command tags not recognized are left untouched.

Possible results for conditional statements:

- Valid statements will always return the first text module.
- Invalid, but recognized statements are removed from the message.
- Statements not recognized are left untouched.

## Individualised mailings - coupon and rebate codes

### [Prerequisites]

Open the configuration window of the software to set the intended coupon code style:

- The style "Four digits" generates simple numbers in the range of 1000 to 9999.
- The style "Hexadecimal RGB colour values" can be used for advertisement campaigns, because it produces colour values you may combine with sweepstakes or contests.
- The style "ID with date and checksum" is intended for higher-grade coupons or limited time offers and comes in the format `MMYY-YYDD-RRRR-RRRR-CC`.

MM: Two-digit month, YYYY: Four-digit year, DD: Two-digit day, RRRR = Four-digit random number, CC = horizontal checksum

### [Insert coupon codes into your mailings]

Use the command tag `<.CouponCode>` to insert a coupon code. You can use the tag several times, it will always show the same unique code per mailed message.

Go to the mailing archive to view a delivery report with abilities to save and print the list of recipients and associated coupon codes. These can be also exported as tab-delimited data file for use in third party applications.

## Self-service remote user management

### [Fundamentals]

The "self-service remote user management" features **user-driven tasks like mailing list (un-)subscriptions and profile management**.

For this purpose, **special e-mail messages** (so-called "command mails") are sent to the mail account of STAR Desktop Mailings. Each command mail uses an **encoded subject line containing the instructions** to perform.

STAR Desktop Mailings **retrieves such messages and processes them** accordingly.

### [Notes on settings]

- On the preferences window (tab "Self-service"), **this feature needs to be turned on first**.
- **"Clean up..." buttons** are intended for testing purposes or troubleshooting.
- Set a list of **strings not allowed in domain names**. Such addresses are prohibited to use the self-service remote user management (incoming messages will be silently ignored).
- At tab "Appearance", you can set **custom fields to be used internally only**. Doing so will disallow users accessing or modifying these fields' contents.
- Outgoing messages can be **sent to another e-mail address** of your choice; useful for archiving purposes (note: mailings will be put into the internal archive).

### [Components of the self-service remote user management]

- Management of mailing list subscriptions and tasks related to user profiles.
- Processing of incoming returned mails.
- Sending of manually processed system mails.
- Sending of recurring, scheduled mails.

### [Features of the self-service remote user management]

The self-service remote user management works similar to a server-based solution, but is less likely to be vulnerable to security issues and offers better protection of user data.

On your website, visitors are able to...

- create their own user profiles.
- subscribe to mailing lists using the opt-in verification method.
- request and edit stored profile information. 1]
- cancel their subscriptions (instantly or by using the opt-out verification method).
- remove their own profiles completely (incl. all subscriptions). 1]

In every sent mailing, subscribers are able to...

- subscribe to other mailing lists using the opt-in verification method.
- request and edit stored profile information. 1]
- cancel their subscriptions for the particular list (instantly or by using the opt-out method).
- remove their own profiles completely (incl. all subscriptions). 1]

1] According your settings on the preferences window.

### Self-service remote user management (continued)

[Flow chart of user-initiated tasks]

Subscribe to a mailing list (and create user profile)

→ Opt-in verification

- Welcome message (optional)

Unsubscribe from a mailing list

→ Opt-out verification (opt.)

→ Goodbye message (optional)

Retrieve profile data, edit or delete a user profile

```
→ Answer message containing profile data
```

Send an incomplete request

→ System message (error message)

[Background execution]

Self-service remote management tasks can be either manually triggered or executed automatically in the background.

STAR Desktop Mailings can be used on any desktop PC or compatible device. For continuous operation (24/7/365), it should be installed on a server (e.g. virtual machine).

Tip: On a desktop computer, use the autostart feature of your operating system to load STAR Desktop Mailings automatically when booting your PC.

**[Status window]**

A status window is shown **at the lower right corner of the screen** providing you with more information. It closes 30 seconds after the cycle has been completed.

Tip: If you want to show the entire status window, just move the mouse pointer over the window to snap it into its original position (window not closes automatically in this case).

[Implementation on your website]

STAR Desktop Mailings provides a **built-in assistant for creating forms and hyperlinks** which can be taken over to your website easily by drag & drop:

On the application menu, click on "Lists", "Source code assistant..." to access the assistant.

### [Implementation on mailings and system mails]

At chapter "Individualised mailings" you'll find a list of command tags used to insert subscription requests, removal requests and other tasks.

Technical note: Please be aware that while you can use forms in HTML-based mailings, many mail clients will probably not support them.

## Self-service remote user management (continued)

### [Security of personal data]

The self-service remote user management uses various protection mechanisms to **prevent abuse attempts** and to **provide a high level of data safety**.

Please keep in mind that despite of every effort made - as with any other system providing access to personal data over public networks - there still remain some risks.

Admin-driven access restrictions (see preferences window):

- Release or block mailing lists accessed by the self-service remote user management.
- Release or block access to user profiles.
- Release or block access to individual custom fields of user profiles.

Note: It is strongly advised to **backup your data** on a regular base !

## Self-service remote user management - recurring mailings

### [Scheduler for recurring mailings]

On the preferences window (tab "Self-service"), **this feature needs to be turned on** as part of the self-service remote user management.

Due mailings are **searched once a day as part of the self-service remote user management**. If you interrupt this process, pending mailings will be sent next cycle.

**Archived mailings** created by the scheduler use the prefix "SCHED\_".

Recommendation: You should run STAR Desktop Mailings **at least once a day** !

### [Dates of delivery]

Absolute delivery date: Fixed date during one year period.

Relative delivery date: Individual date based upon each recipient's list subscription date.

The scheduler will only sent due mailings of the current date. If you wish to process previously ones, you need to manually handle them.

## Data exchange

### [Import of user profiles]

Data import is supporting text-based source files encoded with Unicode (UTF-8 recommended) and character sets based upon Latin-1 to Latin-9 (ISO 8859-x).

Before starting the import process, a backup of the internal databases is created.

**"Smart detection of e-mail addresses"** is an intelligent algorithm that extracts e-mail addresses from any text-based document.

**"Set of records - HT/LB scheme"** requires the following scheme:

```
E-mail address<HT>Salutation<HT>First name<HT>Last name<HT> Custom
field 1<HT>...Custom field6<LB>
```

*" + update: mailing list"*: Import new profiles, subscribe all profiles to the selected list.

*" + update: all fields"*: Import new profiles, synchronize existing profiles.

#### Notes on import

- The source file contents must **strictly match the above scheme**.
- **Custom fields at the end of records** are optional and can be skipped (you don't need to fill the record with horizontal tabulator chars).
- The source file is **not allowed to contain headlines** (as some spreadsheet apps do) **or any other additional data** not matching the above scheme.

### [Export of user profiles]

Export files are always encoded in UTF-8 (Unicode).

#### Supported data formats

**HT/LB**: Fields separated by horizontal tabulators, records separated by line breaks (this is the recommended format for exporting data to third party applications).

**LB/2LB**: Fields separated by line breaks, records separated by double line breaks.

**XML**: Product-specific XML-based scheme.

<HT>: Horizontal tabulator, ASCII code 9 | <LB>: Line break, depends on operating system

## Troubleshooting tips

Many issues can be fixed easily by understanding how the software works. In this chapter, we are going to explain typical problems, their causes and possible solutions.

If you still need assistance, **please contact our customer service**.

### [Software health report]

STAR Desktop Mailings comes with **internal logging and reporting features** providing valuable technical information for troubleshooting purposes.

See application menu, entry "Administration" to open the software health report window.

### [Network-related errors and mail server connection issues]

- Check your mail account configuration carefully.
- Disable firewalls and malware detection tools or add a whitelist entry, where necessary.

### [Failed mail delivery]

- Check your network connection.
- Restart the campaign (see view "Mail archive", menu "More tasks...").

### [Failed import of user profiles]

- Source file must be encoded using an supported character set: Unicode (UTF-8 recommended), Latin-1 to Latin-9 (ISO 8859-x).
- If not using smart detection, ensure that the record scheme is matched (no headers, no empty lines allowed in the source file). See status window for specific error message.

### [Incorrect display of mailing contents (e-mail client software)]

- Text/HTML: Unicode must be supported by the mail client (UTF-8). Most clients released in the year 2000 onwards are compatible.
- Text/HTML: Turn on auto-detection of character encoding in mail client settings.
- HTML: Check for unsupported features (HTML tags, JavaScript, web forms, plug-ins). Use basic HTML only. Check paths of pictures (must be URLs, not local paths).

### [HTML mailing assistant]

- The built-in assistant creates valid HTML that renders well in all popular web browsers. However, please note that some e-mail clients may support a limited subset of HTML only.



## Customer service, help & support

**Customer service:** [www.starenterprise.com/en/customer-service/software/](http://www.starenterprise.com/en/customer-service/software/)

Our support website provides resources covering these topics...

- ☆ Quick-start guides (help with installation, instructions for getting started easily).
- ☆ Frequently asked questions (including answers ;-), technical support.
- ☆ Information about available updates and bugfixes.

**Technical support by e-mail:** [support@starenterprise.com](mailto:support@starenterprise.com)

### [Priority support for customers owning an active license]

In order to allow preferred handling of your inquiry, we need to know your license ID. Please always include your license ID with every request !

See Assistance menu of the software for license information (or have a look at the license document received upon purchase).

## Backups and data recovery

**Please ensure to perform regular backups of your data !**

More information about backups in general and how to restore lost data is available on our support website.

## License information

License ID

License owner

Location of use / Host

## Space for your own notes