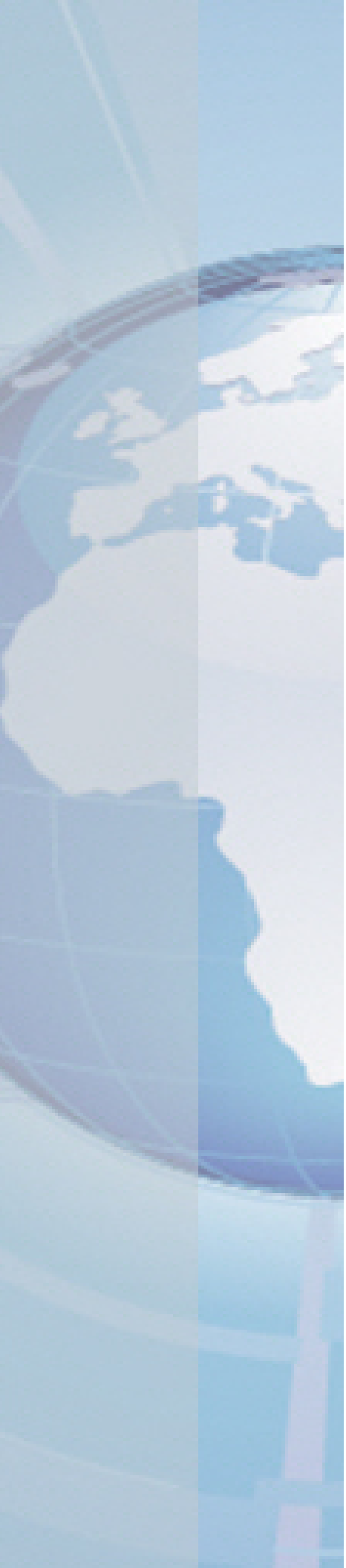

Whitepaper

You Want It? You Got it!

Preparing LISTSERV® Maestro Mailings Based on User Preferences

August 2, 2010

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Introduction

HTML mail has the ability to strengthen your message by combining images, such as your company or brand logo, with text. Studies on whether HTML or text is more popular overall have yielded varying results. In general, it is advisable to allow subscribers to choose their desired format themselves. Recipients' email format preferences can be stored in your database, in the same way as you would store other preference and demographic information.

If recipient data is available that determines the format each recipient prefers to receive, then LISTSERV Maestro can use this data to send the preferred format to each recipient, all within the same job. This determination is based upon a conditional statement run against the recipient data. The advantage of using conditional content is that it's possible to prepare a single job for recipients who prefer HTML and for those who prefer plain text, respecting each recipient's choices as well as saving time and reducing the chance for the errors and duplication that may occur when sending separate mailings for text and HTML messages.

Defining Recipients

The first step is to define the recipient data, and this definition must include a field that makes it possible to determine whether the recipient prefers to receive the message in HTML or text format.

The recipient definition type can be any of the following (or a target group using any of the following):

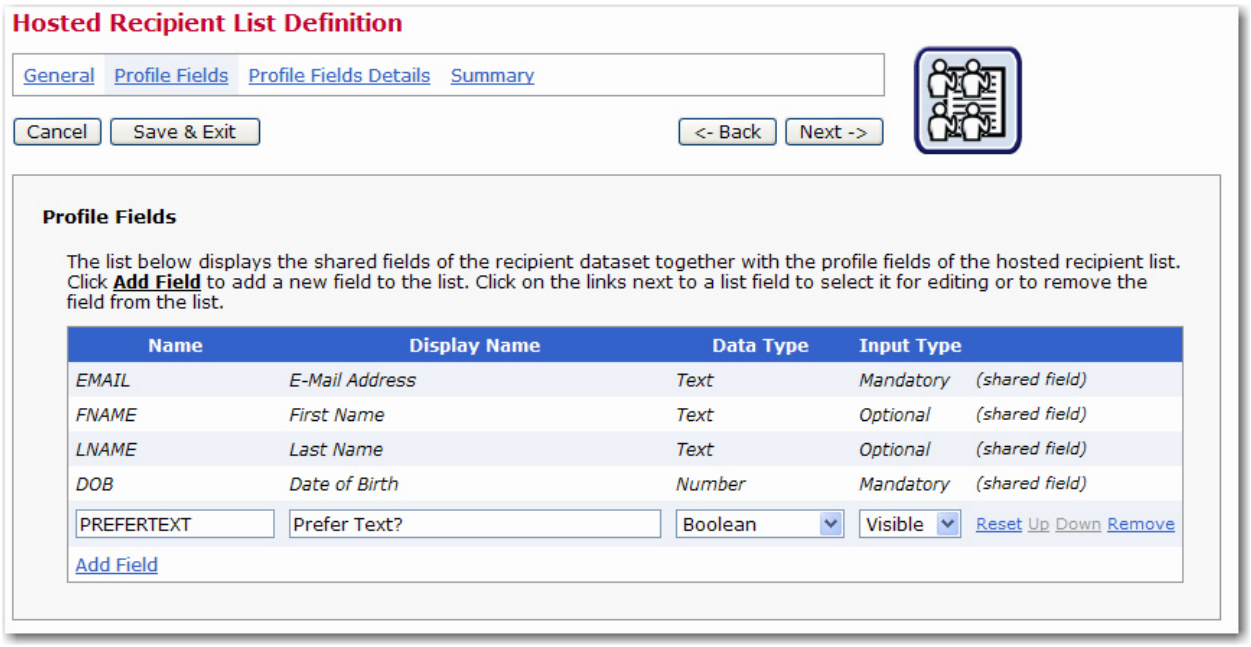
- Upload a Recipients Text File
- Select Recipients from a Database
- Let LISTSERV Select Recipients from a Database
- Any LISTSERV list that uses a database, including LISTSERV Maestro HLLs
- A LISTSERV Maestro HRL
- Determine Recipients Based on Reaction to the Job, as long as the previous job has the field needed to create this type of job.

Note: Standard LISTSERV lists can not have extra fields needed to create this type of job. For more information on defining recipients for an email job, see the *LISTSERV Maestro User's Manual*.

For the purpose of this document, the recipient will be defined using a LISTSERV Maestro HRL. The HRL has a Boolean field defined as PREFERTEXT. This field will be visible to a subscriber as Prefer Text.

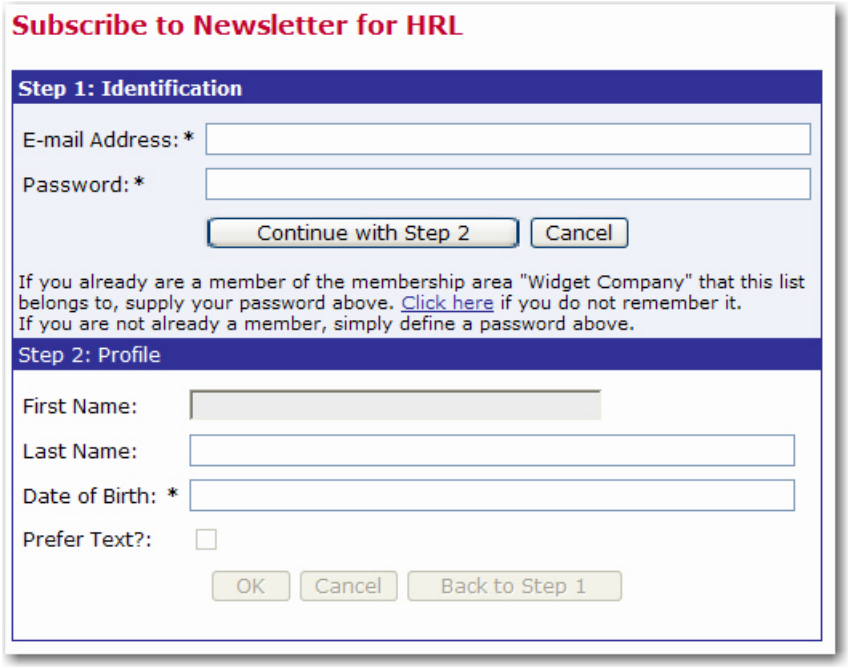
Note: The Boolean field is defined on the Profile Fields screen of the Hosted Recipient List Definition wizard. For more information, see the *LISTSERV Maestro Data Administrator's Manual*.

Figure 1: Adding a Profile Field



Once this field is added and the Hosted Recipient List Definition wizard is completed, then a subscriber will see this field as a checkbox on the Subscribe screen.

Figure 2: Subscriber Screen with Preference Checkbox



If checked, this indicates that the subscriber prefers the plain text format (meaning the Boolean value is true). If this option is not checked, then the subscriber prefers HTML (meaning the value is false).

Note: This field is also available when the data administrator is adding subscribers. For more information, see the *LISTSERV Maestro Data Administrator's Manual*.

Creating the Message

To create a message that can be sent to recipients who prefer HTML as well as to those who prefer plain text, go to the Define Message screen for the job. At the top of the screen, select the **HTML with Alternatives** and the **Text Format** options.

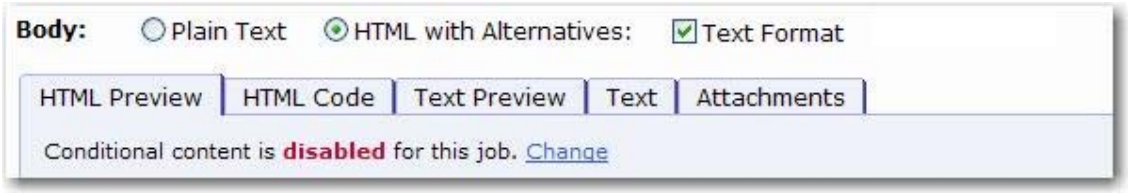
Figure 3: Creating an HTML Message with Plain Text Alternative

Next, you'll need to enable conditional content and construct the condition that determines whether a particular recipient will receive the text-only version of the message or the HTML with text alternative.

Enabling Conditional Content

In order to use the Conditional Content feature, it must first be enabled. To enable conditional content, click on the **Change** link that appears directly under the tabs of the text box on the Define Message screen when **HTML with Alternatives** is selected.

Figure 4: Enabling Conditional Content



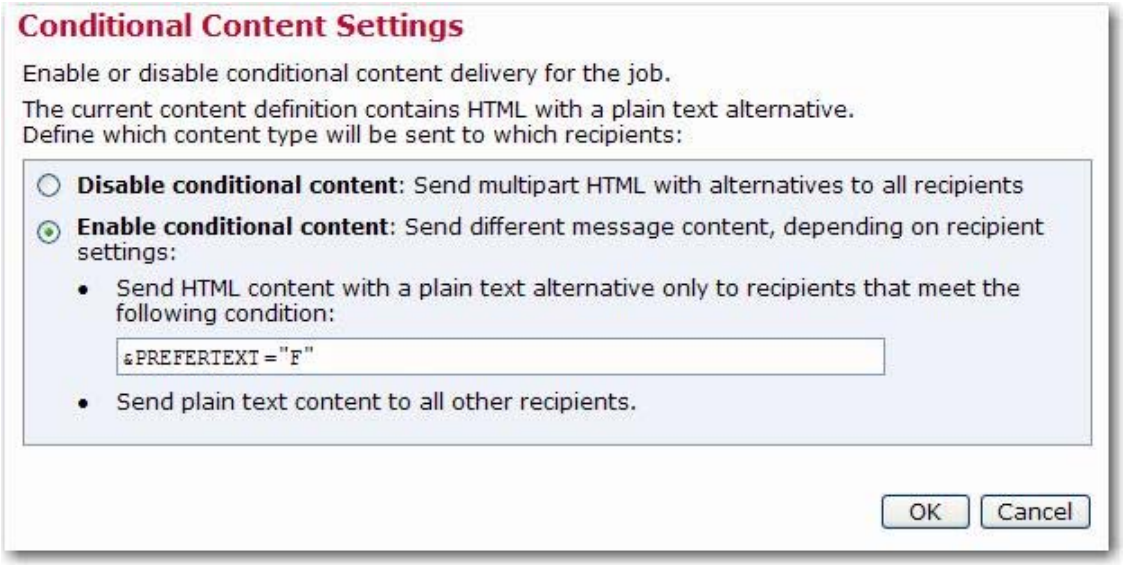
The Conditional Content Settings screen opens. Select the **Enable conditional content** option.

Once this function is enabled, you need to type in the condition that determines which recipients receive which type of mail. LISTSERV Maestro uses the standard LISTSERV syntax to create the condition. See the *Conditional Operators* section for more information on constructing conditions.

If a recipient fulfills the condition, then the full HTML email including the plain text alternative is delivered to that recipient.

If the recipient does not fulfill the condition, then a simple plain text email is delivered instead, containing only the plain text alternative.

Figure 5: The Conditional Content Settings Screen



Conditional Operators

The condition that is evaluated is created by making a comparison against recipient data. Operator symbols make up the statement and appear in a table below. Operators are not case sensitive. However, == (strictly equal to) and ^== (not strictly equal to) are available when case must be respected. String literals within a statement must be enclosed within quotation marks if they contain spaces.

Table 1 Conditional Operators

Symbol	Definition	Example
=	is equal to (case insensitive)	`&PREFERTEXT; = F` (will also match if PREFERTEXT is set to “f”)
==	is strictly equal to (case sensitive)	`&PREFERTEXT; == F` (will only match capital “F”)
>	is greater than	`&AGE; > 20`
<	is less than	`&YOB; < 1985`
>=	is greater than or equal to	`&AGE; >= 21`
<=	is less than or equal to	`&YOB; <= 1986`
=*	matches wildcard expression	`&EMAIL; =* "*@AOL.COM"`
^	negation - used in conjunction with the other mathematical operators, for instance, "^=" means "is not equal to"	`&PREFERTEXT; ^= T`
IN	The specified text is found in the space-separated data provided.	`HTML IN &PREFERENCES;`
NOT IN	The specified text is not found in the space-separated data provided	`TEXT NOT IN &PREFERENCES;`

AND	Multiple conditions are all met (use parentheses around each condition)	`(&EMAIL; =* "*@AOL.COM") AND (&PREFERTEXT; ^= T)` (only AOL.COM recipients who did not check the box will receive the HTML version; non-AOL recipients will all receive the text version, whether they check the box or not)
OR	Any one of multiple conditions is met (use parentheses around each condition)	`(&EMAIL; =* "*@EXAMPLE.COM") OR (&PREFERTEXT; = F)` (all example.com recipients and all recipients who did not check the box will receive the HTML version)

Composing the HTML Message

There are several ways to compose HTML messages in LISTSERV Maestro:

- Upload an HTML file from a local drive.
- Copy and paste HTML source code from another application.
- Type in HTML source code.

HTML messages can be created locally in any HTML editing program and uploaded to LISTSERV Maestro.

In order for any links to be tracked in an HTML message, they must be enclosed within quotation marks. Most HTML editors will do this automatically, but it is possible to create a link without quotation marks that will be read in Internet Explorer (this browser is very forgiving of HTML coding errors). If in doubt or if there is trouble selecting a tracking definition for a seemingly good link, then you'll need to double check the HTML coding of the links. An example of correct coding appears below:

```
<a href="http://www.lsoft.com">Link text goes here</a>
```

Omitting the quotation marks would result in incompatible coding for LISTSERV Maestro tracking.

Important: In order to upload HTML files into LISTSERV Maestro, it is necessary to have the Microsoft® Java Virtual Machine (MS JVM) or Sun Microsystem's The Java Virtual Machine (JVMTM) installed. This ensures that any accompanying image files for backgrounds, banners, icons, diagrams, and pictures will be automatically uploaded with the source code. Most Windows systems manufactured before 2003 already have MS JVM installed. If a system does not, download The Java Virtual Machine from http://java.sun.com/getjava/index.html.

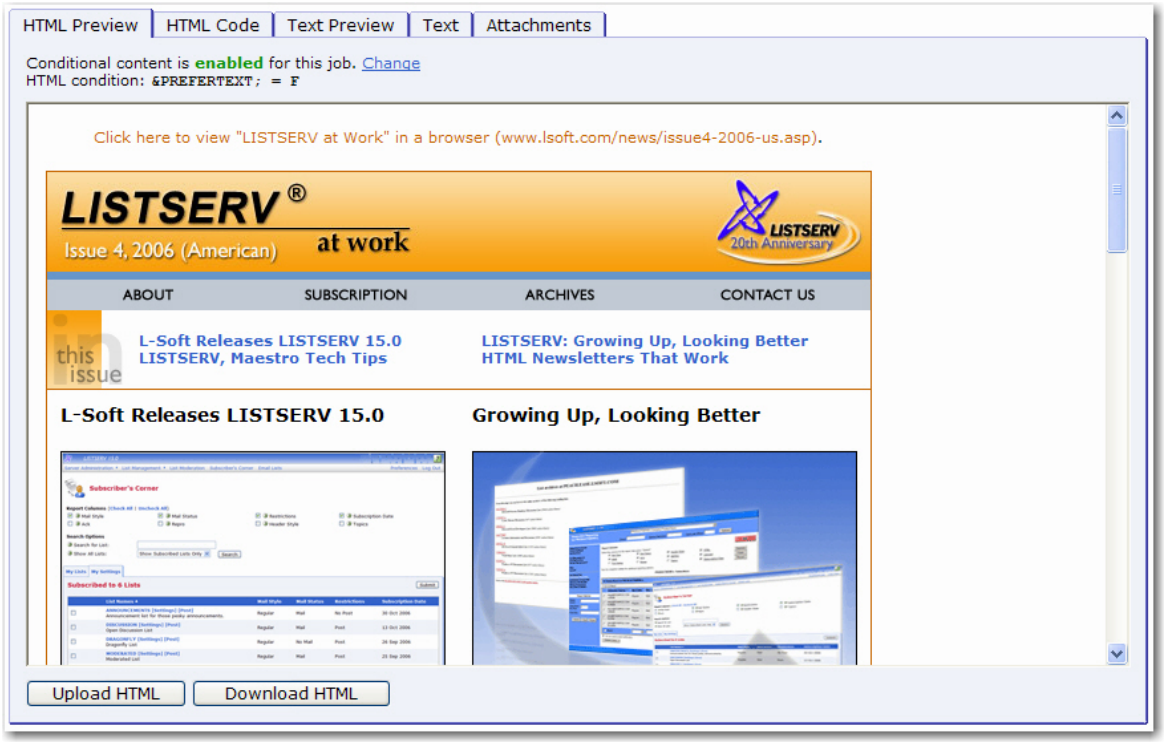
To upload an HTML file from a local drive:

1. Click **[Upload HTML]** from the Define Message screen.
2. The first time a file is uploaded after The Java Virtual Machine is installed, a Security Warning screen will appear, asking for permission to use the L-Soft applet to upload HTML. If **Always trust content from L-Soft Germany GmbH** is checked, then the Security Warning screen will not re-appear for future uploads. If this option is not checked, then it will be necessary to grant permission to use the applet every time HTML files are uploaded in a new browser session.

   Grant permission to install and run HTML Upload Applet. Check **Always trust content from L-Soft Germany GmbH** to prevent the dialog box from re-appearing. Click **[Yes]** to continue.

3. Browse a local drive for the file, select the file to upload, and then click **[OK]**. If there are any image files that are linked remotely or embedded from local files, then a screen will appear listing each and asking whether to proceed with the upload. Click **[Yes]**. The HTML message will then appear in the HTML box.
4. Review the Load Properties, and then click **[Yes]** to continue.
5. Review the Load Results, and then click **[Yes]** to continue.
6. Once the upload is complete, you can view the HTML part of the message on the HTML Preview tab.

Figure 6: The HTML Preview Tab



The LISTSERV Maestro applet will also check to ensure internal and external references to linked or embedded image files are valid. Linked files are not sent with the message; embedded files are sent with the message. One advantage of using linked files is that the message will be smaller. However, a live Internet connection is necessary to view linked files. If the image server is down, they will not be visible. In addition, some firewalls strip HTML messages that contain links to outside sources thus rendering the image invisible.

Embedded files, on the other hand, will be visible without a live Internet connection and if the image server is down. They will make the message larger, but they will not, in most cases, be stripped from the message by a firewall. Consider the use of images – whether linked or embedded – carefully to avoid complications for the recipients.

Any invalid links will be counted as errors and will be reported on the Load Results screen. If **[Yes]** is clicked, then LISTSERV Maestro will continue uploading the HTML file even if it contains link errors. The error report is only a warning to remind the user that there are currently problems, but the upload is not suspended. The reason that uploads are not halted when the HTML contains errors is that the linked files simply may not be available yet. Sometimes, referenced web sites are under development or are being updated as the email message is being created. Once the linked site is complete, the message will be valid and can be sent out.

Tip: Make clicking each link for linked files a part of the testing procedure and don't approve the test until all of the links are working correctly.

Table 2 Advantages and Disadvantages of Linked and Embedded Files

	Advantages	Disadvantages
Linked Files	Smaller message size. Mail servers are less likely to refuse a small message.	Recipients must have a live Internet connection. Some firewalls strip HTML content linking to outside sources. Some email clients refuse to show linked files. Image server must be available when the recipients read the message.
Embedded Files	No image server needed. Firewall will not strip content. Visible without a live Internet connection.	Larger message size. Some mail servers may refuse or delete large messages.

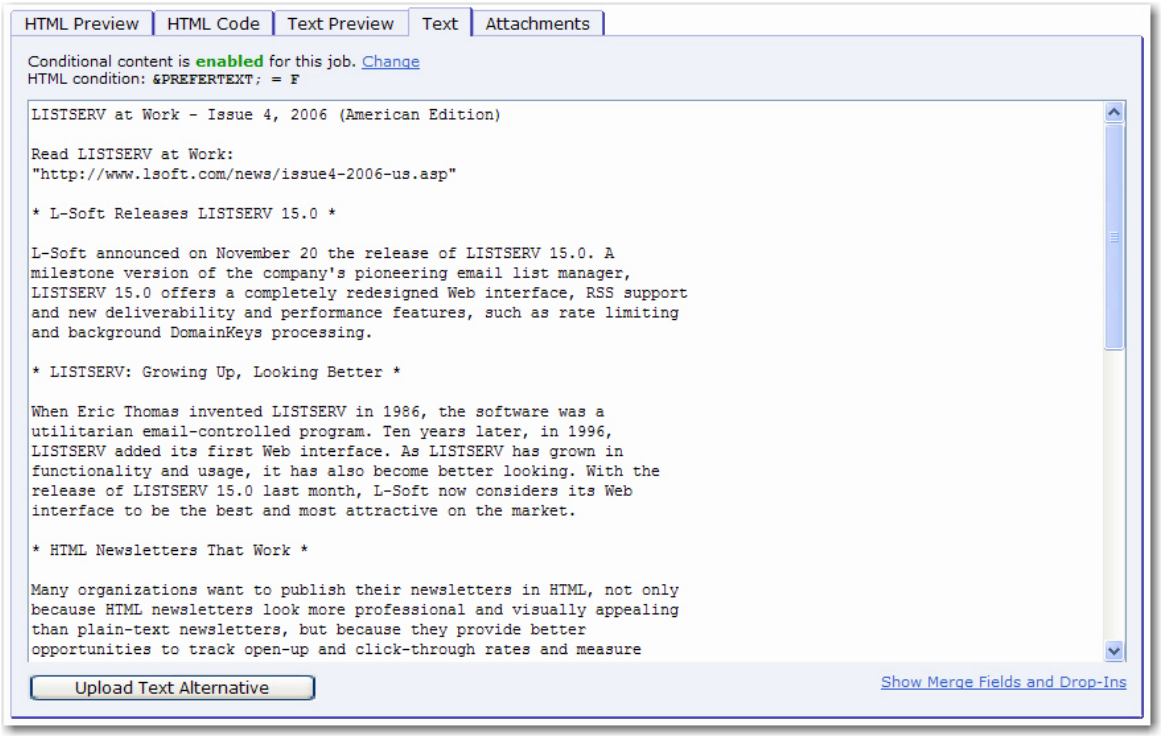
Adding Alternative Text to an HTML Message

To add a plain text alternative to an HTML message, click on the Text tab. The text part of the message can be uploaded, pasted, or typed directly into the box.

To upload a text file from a local drive:

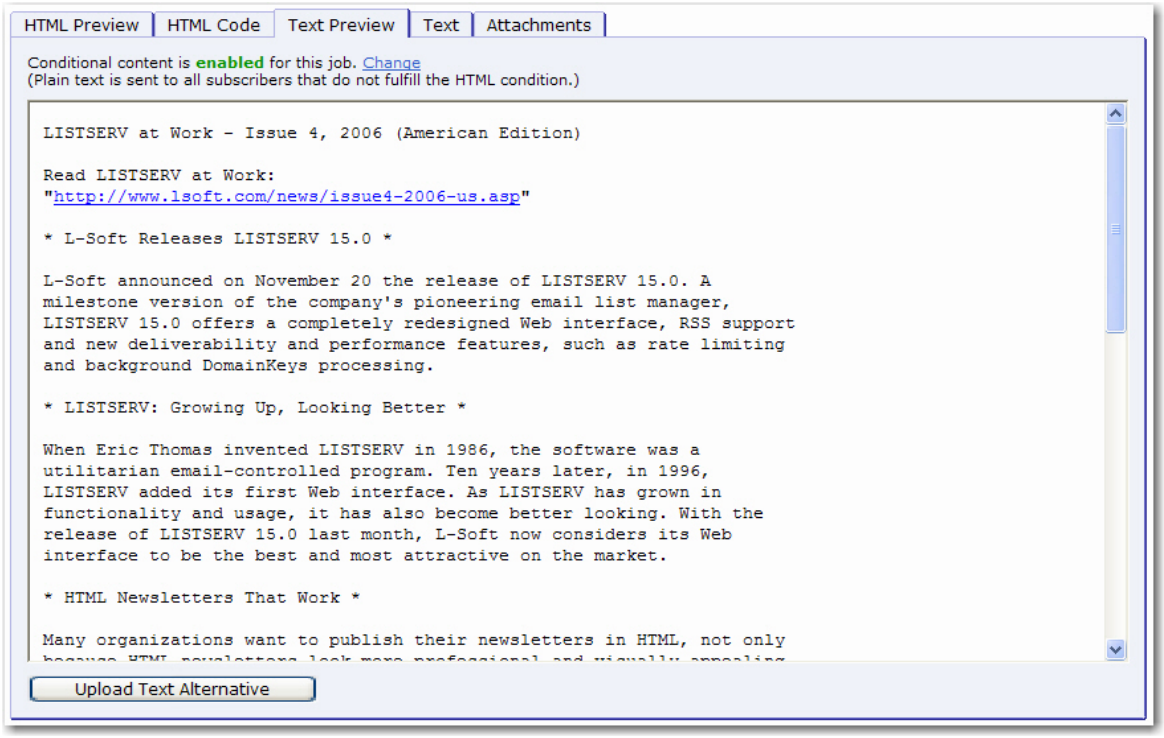
1. Click on the **[Upload Text Alternative]** button.
2. Browse to the text file, and then click the **[Upload]** button.
3. Once the upload is complete, you can view the text part of the message on the Text tab.

Figure 7: Previewing the Text Alternative on the Text Tab



If drop-in content has been enabled, then you can click the Text Preview tab to see what the message looks like to recipients.

Figure 8: Previewing the Text Alternative on the Text Preview Tab



For more information on drop-in content, please refer to the *LISTSERV Maestro User's Manual*.

References

LISTSERV Maestro User's Manual

LISTSERV Maestro Data Administrator's Manual

http://www.lsoft.com/resources/manuals.asp