



## Easy Guide to: List creation and upload description for Email

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### CREATE YOUR LIST

You should construct your broadcast list prior to the time of your first broadcast. This should start off as an excel spreadsheet with at least three columns ... e.g. Reference (e.g. Company) , Name (e.g. person to whom you are sending the email), and email address. (Note you can have more columns such as Custom Fields for personalisation of your emails.) You can have the first row be a "header row" with these names so you know the contents of each column. Then populate the columns with the appropriate details. All columns must be text fields. This is so the spreadsheet does not interpret any data (e.g. phone numbers) as numerical fields. You should then save this file as a CSV file. The resultant CSV file is then ready to be uploaded into OzMedia's system. Following are the detailed instructions for these steps.

1. Click Start
2. Go to programs, then go to Excel, click Excel.
3. Excel is a spread sheet divided by columns and rows. 1<sup>st</sup> name your columns.
  - i. Call column A, Ref. This is the reference that will be shown on your delivery report.
  - ii. Call column B, Header.
  - iii. Call column C, Email. This is the email address to which you will be sending your email messages.
  - iv. Start entering your data according to the column title. Eg

Ref	Header	Email
ABC Company	Fred Smith	john.smith@hotmail.com

4. Once you have completed your list
  - i. Click on **file**,
  - ii. Click on **save as**,
  - iii. **Select the folder** you want to save your list in.
  - iv. In the File name area **Name your list** keeping the keeping the .xls extension after the file name.
  - v. In the **Save as Type** area click on the down arrow and scroll down and click on **CSV ( Comma delimited ) (\*.csv)** to select this type of file to save your list document as...
  - vi. Click on **save**.
  - vii. A pop up box will appear click on **OK**.
  - viii. Another popup box will appear click on **Yes**.
  - ix. Exit the file and when prompted if you want to save changes, click **No**.

### UPLOAD YOUR LIST

1. Make sure you are connected to the internet and click on your internet browser icon.
2. Type the url of our site into the address field and hit enter.
3. Type in your user ID \_\_\_\_\_
4. Type in your Password \_\_\_\_\_
5. Click "Login".

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6. Click on "Manage Lists" on the left hand side on the screen.
7. Click on "Add new list".
8. Name your list in the "List Name" section.
9. Select List Type "Email".
10. Click on "Submit".
11. Click on "Import" for your list (your list name should appear in the table now that you have already created a list in the system).
12. Click "Import Data".
13. Select list name you want to import data to (should already be filled in with your list name).
14. Click browse and look for the list you created in the CSV file back in the first section of these instructions "Create Your List", select it.
15. In "My fields are delimited by" click the drop down arrow and select "comma".
16. In "The first row is a heading row", select "yes".
17. In the "Delete old data first" area select the appropriate data up load instruction. Eg "Yes, delete All data" - if this is a new list you are uploading or "No, add this data to the current record set" – if you want to add to an existing list.
18. Click Next.
19. Ref = "Your Reference"
20. Header = "Recipient Full Name".
21. Email = "Email"
22. Click "Next". You have now imported your list into the system and are ready to do an email broadcast!
23. Click on Broadcast Messaging under New Broadcasts and then Email to begin your email broadcast.

## **INITIATE YOUR BROADCAST**

1. Log into OzMedia.
2. Click on "Broadcast Messaging".
3. Click on "Email" as the Broadcast Method.
4. Click on the list name which you created back in "Create Your List".
5. Give this particular broadcast a name. OzMedia will use this name later for reporting purposes.
6. Before you hit next, you can also click on details to view the list you are going to use. You can remove particular recipients at this time if you choose.
7. In the next screen, you will enter the details of your email broadcast, indicate if you are going to add any attachments, and enter the content of your email to be broadcast.
8. If you indicated that you have attachments to your email, then you will be asked to upload these in the next screen
9. Next you will see the quote for your broadcast and you can indicated if you want your broadcast to be sent now or anytime in the next twenty-eight days.
10. Once you submit your job, you don't have to do anything more .. it will go at the time you have requested.