



Whitepaper

Getting Your Message Out!

*Helping Subscribers
Forward Your Messages
to their Friends*

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Introduction

“The only way to have a friend is to be one.”

- *Ralph Waldo Emerson*

The purpose of this document is to describe how you can give your subscribers and recipients the freedom to share your information with their friends, family, and colleagues by using the Forward-to-a-Friend feature offered by LISTSERV Maestro.

How Forward-to-a-Friend Works

The Forward-to-a-Friend feature lets you set up a “Forward this e-mail to a friend” link for each message you send to your list subscribers or message recipients. Once setup, this link gives your subscribers and recipients the freedom to share the message with others. Using this feature gives you the ability to reach a wider audience with your message and the ability to build your subscriber list using their friends as a referral.

Once the message is forwarded, an exact copy of the message will be delivered to all of the addresses supplied by the subscriber. Upon arrival, the message contains an additional preamble and personal message (optional) informing the new recipients who forwarded the message to them. The forwarded email will also contain the same “Forward this e-mail to a friend” link that was in the original mail, allowing the recipient to forward this message, yet again, to more friends.

Note: Privacy is preserved throughout the forwarding transaction, and every subsequent forwarding transaction.

If Forward-to-a-Friend tracking was enabled for the original message, then LISTSERV Maestro will also keep a record of all these forwards, with a detail level that corresponds to the selected tracking level. This means that, down the road, you can view reports listing how many forwards were triggered and how many of the forward recipients subscribed to the list. Even when tracking statistics can be generated, the privacy of the new recipient is completely safe guarded. The email address of the forwarder is always identified to the new recipient to prevent abuse.

Notes: If the original message uses merge fields to fill in profile field values of the original recipient, then these fields will be freshly merged for each forward. This means that if the original recipient's profile fields have changed since the original mailing, then the forwarded message will contain different merge field values than the original message.

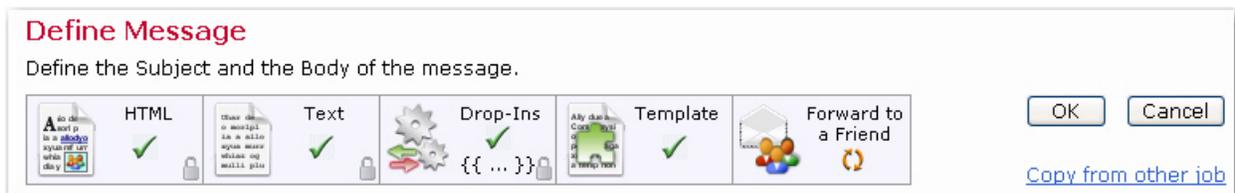
The forwarding will only work while the original Hosted Recipients List still exists and the original recipient is still a subscriber of that list.

Enabling Forward-to-a-Friend

The Forward-to-a-Friend feature can be enabled while you are defining the content of your email job. From the Job Details screen for your job, simply click on **Define Message**. The Define Message screen opens. (For more information on creating an email job and defining a message, see the [User's Manual for LISTSERV Maestro](#).)

At the top of this screen, there is a row of icons that make it easy for you to define different aspects of your message. One of these icons is for the Forward-to-a-Friend feature. Click this icon to open the "Forward to a Friend" Setting screen.

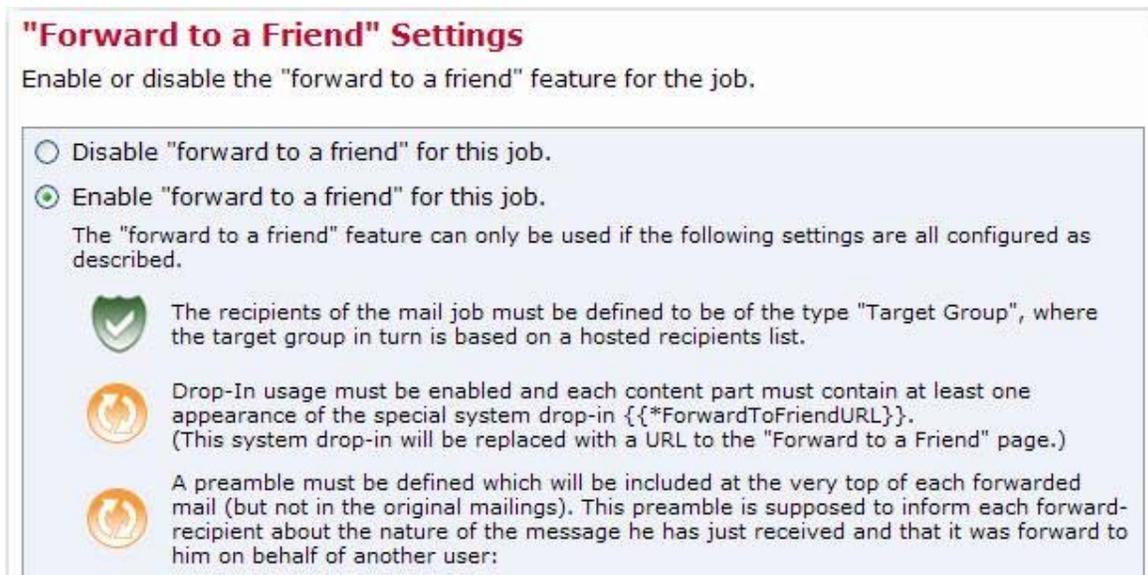
Figure 1: Enabling Forward-to-a-Friend



The "Forward to a Friend" Settings screen allows you to enable or disable the forward to a friend feature for your message.

The screen is divided into several parts. The top part is where you enable the feature by simply clicking the **Enable "forward to a friend" for this job** option. Once this option is enabled, the rest of the screen becomes active.

Figure 2: The "Forward to a Friend" Settings Screen



After enabling this feature, you will need to make sure that the conditions described on the screen are correctly met and the settings are configured accordingly. If a condition is not met, then the **Orange Circle** icon appears next to it. When a condition is met, then the **Green Shield with a Checkmark** icon appears next to it.

The following conditions must be met for the feature to function properly:

- **Recipients Type** – Forward-to-a-Friend only works with recipients that are based on a target group that is based on a Hosted Recipient List. The feature does not work with any other recipient type.
- **Drop-Ins** – Drop-in usage must be enabled for the message and the special system drop-in `{{*ForwardToFriendURL}}` must appear at least once in the message body. If the message has several body parts, like an HTML mail with a text alternative, then this special system drop-in must appear at least once in each body part. This system drop-in will later be replaced with a URL that, if clicked, will send the recipient to the special page where he can enter the e-mail addresses of his friends, to which he wants to forward the message. You should make sure that this system drop-in appears in a location where it can be easily found and understood by the recipient.

For example in a plain mail, you probably want to embed the system drop-in in some explanatory text, similar to this:

```
Click the link below if you want to forward this message to any of your friends: {{*ForwardToFriendURL}}
```

In an HTML mail, you should use the system drop-in not only in the correct context, but also as the value of the "href"-attribute of an `<a>` tag so that it will actually be rendered as a clickable link, similar to this:

```
<a href="{{*ForwardToFriendURL}}">Click here</a> to forward this message to any of your friends.
```

- **Forward to a Friend Preamble** – Whenever a message is forwarded using the Forward-to-a-Friend feature, a special preamble is prefixed to the actual message, letting the recipient know that they are not the original recipient of this email, but that it has been forwarded by a friend. This is also important so that the recipient does not think that the email is spam. Because of this, the preamble is mandatory and can not be left empty.

The rest of the “Forward to a Friend” Settings screen is where you define the preamble for the forwarded message.

If the message is an HTML message with a text alternative, then two preambles must be entered – one for the HTML part (which may also contain HTML code) and one for the text alternative part.

Figure 3: Defining the Preamble

HTML-part preamble (may contain HTML code): Actions

Text-part preamble:

In the preamble, the following special system drop-ins are allowed (drop-ins shown in bold are mandatory):

- {{*SenderAddress}}** Replaced with the address of the forwarding user.
- {{*SubscribeURL}} Replaced with a URL to the subscribe page of the hosted recipient list (to allow the forward-recipient to also subscribe to the list).
- {{*UserMessage}} Replaced with an optional personal message supplied by the forwarding user (see help page for details).

OK Cancel

In the preamble, the following special system drop-in is mandatory:

- **{{*SenderAddress}}** – The preamble must contain at least one occurrence of this special system drop-in, which will be replaced (during the forwarding process) with the email address of the recipient who triggered the forward. This drop-in lets the friend-recipient know who the message was from.

There are two more special system drop-ins that are optional:

- **{{*UserMessage}}** – This system drop-in allows for the addition of a personal message when forwarding the message. For more information, see the [Allowing Recipients to Enter a Personal Message](#) section.
- **{{*SubscribeURL}}** – This system drop-in allows the friend-recipient to also become a subscriber of the original list. For more information, see the [Letting “Friends” Subscribe to Your List](#) section.

Note: These three drop-ins, described above, are the only drop-ins that can be used in the preamble. In addition, these three special drop-ins can only be used in the preamble and cannot be used anywhere else in the body of the message.

The **Actions** link opens a menu with the following options:

- **Save Current Preamble as Default** – The current content of the preamble is saved as a default, making it available for use in other mail jobs.
- **Reset Preamble to Default** – If you have previously saved your own default preamble (with the **Save Current Preamble as Default** option), then this option allows you to re-use this default for the current job. The preamble will be replaced with whatever preamble was last saved as your personal default.
- **Reset Preamble to System-Default** – The preamble will be replaced with a system-defined default preamble. This option to reset to the system-default is always available.

Tip: Select this option, and then make changes to the default preamble as a shortcut to defining your own preamble. This will save you formatting time and provide you with an example of the usage of the system drop-ins.

Allowing Recipients to Enter a Personal Message

The `{{*UserMessage}}` system drop-in in the preamble allows for the addition of a personal message supplied by the forwarding user. For this system drop-in, the following rules are used:

- If the `{{*UserMessage}}` drop-in is not present in the preamble, then the forwarding user will not have the option of entering a personal message (i.e. there will not be a personal message included in the preamble of the forwarded message).
- If the `{{*UserMessage}}` drop-in is present, then the forwarding user will have the option of entering a personal message, but this personal message is optional.

If a personal message is entered, then it will be used to replace the system drop-in.

If a personal message is not entered, then the system drop-in will simply be removed from the preamble (or in other words, it will be replaced with an empty string).

- The `{{*UserMessage}}` drop-in uses a special syntax that lets you define a prefix and a suffix for the personal message. The prefix and suffix are only included if the user actually supplies a personal message.

To include a personal message anywhere in the preamble, without a special prefix or suffix, simply type the name of the system drop-in, `{{*UserMessage}}` (with the opening and closing tags that are appropriate to your message), at the desired location.

If you want to define a prefix and/or suffix for the personal message, then use the following syntax:

```
{{*UserMessage prefix#VALUE#suffix}}
```

where you replace "prefix" with the desired prefix text and "suffix" with the desired suffix text, using the following rules:

- The string #VALUE# (including the "#" enclosing characters) must appear between prefix and suffix (if any are present).

- Both prefix and/or suffix may be empty (may be left out).
- Both prefix and suffix may contain linebreaks. The linebreaks will become part of the prefix/suffix.
- Any characters after "`*UserMessage`" and before "`#VALUE#`" will be part of the prefix, including all linebreaks (even linebreaks that appear immediately before "`#VALUE#`"), except for any whitespace that follows immediately after the word "`*UserMessage`" and that appears on the same line as the word "`*UserMessage`". This particular whitespace is ignored. Also, if the first line contains only whitespace after the word "`*UserMessage`", then the linebreak at the end of this line will also be ignored and will not be part of the prefix. (See below for examples.)
- Any characters after "`#VALUE#`" and before the closing drop-in tag "`}}}`" (or whatever closing tag is applicable in your message) will be part of the suffix, including all linebreaks, even linebreaks that appear immediately after "`#VALUE#`" or before the closing tag "`}}}`". (See below for examples.)

If the user does not supply a personal message, then the whole system drop-in (starting with the opening tag and ending with the closing tag) will be replaced with an empty string, i.e. the prefix and suffix will not appear.

If the user supplies a non-empty personal message, then the whole system drop-in (starting with the opening tag and ending with the closing tag) will be replaced with the text that is built by linking the prefix, user message, and suffix. Or, in other words, in the string "`prefix#VALUE#suffix`", the "`#VALUE#`" part (including the enclosing "`#`" characters) is replaced with the personal message, and the resulting string (including prefix and suffix) is used to replace the system drop-in.

The following examples are for `{{*UserMessage}}` drop-ins with prefix and/or suffix. In the examples, linebreaks are shown as "`¶`" for better readability, and the prefix is marked with a green background, while the suffix is marked with a yellow background.

Simple prefix and suffix:

```
{{*UserMessage Prefix Text#Value#Suffix Text}}
```

Prefix and suffix with linebreaks:

```
{{*UserMessage Prefix First Line¶
Prefix Second Line#Value# Suffix First Line¶
Suffix Second Line}}
```

Note: The whitespace before the first prefix character is not part of the prefix itself, since all whitespace between "`*UserMessage`" and the prefix is ignored, while the whitespace in the first suffix line (after "`#VALUE#`") is part of the suffix.

Prefix and suffix with linebreaks before the first lines and after the last lines:

```
{{*UserMessage ¶  
Prefix First Line¶  
Prefix Second Line¶  
#Value# ¶  
Suffix Second Line¶  
Suffix Third Line¶  
}}
```

Notes: The whitespace and the linebreak on the first line is not part of the prefix because if the first line contains only whitespace and a linebreak after "*UserMessage", then both the whitespace and the linebreak are ignored. In comparison, the whitespace and the linebreak immediately after "#VALUE#" are part of the suffix; therefore, the suffix has actually three lines (where the first line is empty except for whitespace).

The prefix ends with a linebreak; therefore, the personal message will start on a new line after the prefix. Similarly, the suffix ends with a linebreak; therefore, whatever comes after the drop-in will start on a new line after the suffix.

Letting “Friends” Subscribe to Your List

The {{*SubscribeURL}} system drop-in in the preamble will be replaced with a URL of the subscribe page for the Hosted Recipient List (HRL) that was initially used in the recipient definition. You can use this URL to include a link in the preamble that allows the friend-recipient to also become a subscriber of the original list. If left out, then no such URL will be included in the preamble.

Notes: Only subscriptions that happen through a click on this URL in a forwarded message will be counted as "conversions" and reported in the forward-to-a-friend reports.

The HRL and dataset must both be “open to everyone” in order for the {{*SubscribeURL}} system drop-in to function.

Tracking Your Forwards and Conversions

The Forward-to-a-Friend feature also lets you track the forwards and conversions derived from your forward-to-a-friend emails.

To set up tracking, simply select the **Yes, enable tracking of forward-requests and forward-conversions** option on the Tracking Details screen of the Tracking Definition wizard.

Figure 4: Enabling Forward-to-a-Friend Tracking

Tracking Definition

[On/Off](#) | [Tracking Details](#) | [Type](#) | [Type Details](#) | [Summary](#)

Cancel
<- Back
Next ->

Tracking Details

Open-Up Tracking

Yes, enable open-up tracking for this job

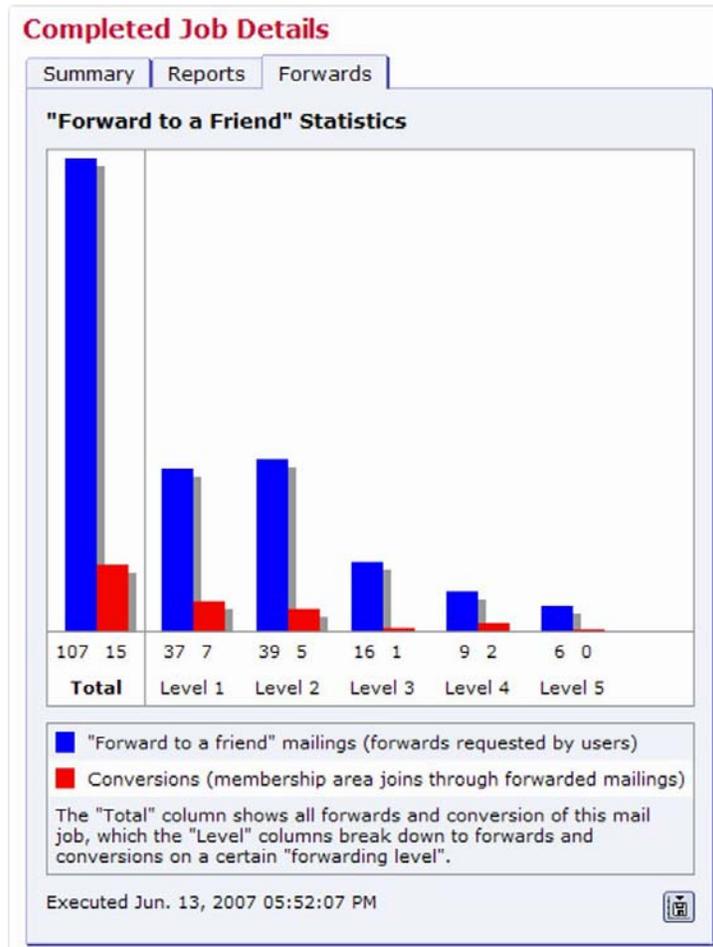
"Forward to a Friend" Tracking

Yes, enable tracking of forward-requests and forward-conversions

Once this is set up, and after your job is completed, you'll be able to view the results on the Forwards tab on the Completed Jobs Details screen.

Note: This tab is only available if the forward to a friend feature was enabled for the job.

Figure 5: The Forward-to-a-Friend Report



The report will show a chart with all forward requests and conversions. Forward requests are forwards requested by users, i.e. either by the original recipients or by friend-recipients. Conversions occur when someone joins the membership area using the special { { *SubscribeURL } } link in the forwarded message.

Customizing the Forward-to-a-Friend Pages

The default Forward-to-a-Friend page is completely customizable, just like the other Subscriber Interface pages.

Figure 6: Customizing the Forward-to-a-Friend Page



The screenshot shows a web page titled "Forward to a Friend" with a blue header bar. Below the header, the text reads: "This is the 'forward to a friend' page of the mailing:" followed by "[Mail subject will go here]". Below that, it says: "You can forward this mailing to any friends which you think may be interested in it too. To forward the mailing, please enter the friends' addresses (one or more) below." There is a text input field with a vertical scrollbar. Below the field, a note states: "Note: The forwarded e-mail will be sent with your e-mail address as the sender address. Your friends will receive the same e-mail as you did, including all profile field values that may have been merged into the e-mail (if the profile changed since the original mailing, then the forwarded e-mail will contain the new profile field values)." At the bottom right, there are two buttons: "Forward" and "Cancel".

In addition to the default Forward-to-a-Friend page, there are also several new Forward-to-a-Friend message pages. These messages include the "Forward to a Friend" Cancelled message, the "Forward to a Friend" Confirmation message, the Processing "Forward to a Friend" message, the "Forward to a Friend" Not Possible message, the No Unsubscribe After "Forward to a Friend" message, and the "Forward to a Friend" System Error message.

For more information on customizing Subscriber Interface pages, see the [Interface Customization Manual for LISTSERV Maestro](#).

References

LISTSERV Maestro User's Manual

LISTSERV Maestro Interface Customization Manual

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