

BookMine Basics Distribution Lists

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What are Contact Distribution Lists?

Contact distribution lists are a way to group together lists of contacts from your database that you wish to retrieve for particular purposes – for instance to send an email or newsletter to. An individual contact can be subscribed to none, one or many distribution lists. Contacts can easily be added or suspended from distribution lists to reflect their wishes. For example as individuals go on holidays, change their interests or simply no longer wish to receive further contact on a particular topic (or all topics they are subscribed to) you can adjust their subscriptions accordingly.

Maintenance of these lists is an ongoing task and reflect the wishes of the subscribers at all times. If a subscriber to a list that is used to send out promotional material about a specific topic or events no longer wishes to receive it they should be suspended from the list. These lists will help everyone in your enterprise to comply with your customers wishes no matter how recently they joined your organization.

How to Create a new Distribution List

1. From the **main switchboard** click the Distribution Lists button. The Contacts Distribution Lists Maintenance form will be displayed. Click the **New List** button at the bottom of the form.
2. A window with a drop down box will display. **Enter a unique** (i.e. a different name to any other distribution lists in the drop down list) **name in the dropdown box.**
3. You are warned that this contact list does not exist and asking if you wish to generate or create a new list with this name. **Click Yes or AltS.**
4. A window with New Contact List will be shown on the screen. The name of the list you entered will be visible together with two empty boxes – one for a description of the list and the second for the contact method for this list. **Enter a short description of the list** - this serves as a useful note for later or for another staff member wondering what the purpose of the list is. Some lists are created for very obvious reasons and used frequently, whereas others may be used less frequently. It is surprisingly easy to become unsure of the purpose of the list, the contacts included or some other aspect of the list. Writing a short description helps prevent this happening.
5. Contact mode. At this point you need to decide what **method of contact** you will be using to get in touch with the distribution list you are creating – for instance is the purpose of this distribution list to send a printed newsletter to a group of customers or to send an email to let subscribers know about new arrivals in their area of interest? If the purpose is to send a printed newsletter you should click the Standard Mail option in the contact mode box and if to send an email click the email option. If the email option is chosen BookMine will only allow you to add contacts who have an email address thus helping you keep your lists as clean as possible.
6. After entering the contact mode you wish to use click **Accept** and your new list is now created!

Fig: Contact Distribution List Management interface

Create a new list by typing in name that does not already exist. You are prompted to continue.

List name, typical list usage and type. If type is email members must have valid email address

Suspend a subscriber (equivalent to removing) Optionally specify a date to be auto reinstated

Create a new list, Delete a list, and Rename a list

Display the lists that this contact is subscribed to. Show details fro this customer.

Adding Subscribers to Distribution Lists

Adding subscribers to a list is easy. You can do this from numerous locations throughout the program including the contact form, email summary form, and from the Contact Distribution Lists area. Adding and suspending (removing) subscribers should be an ongoing maintenance task that is carried out when a contact indicates a change in their wishes.

Adding a Contact or Subscriber to a Distribution List - from the Contact Form

1. **Go to the contact record** you wish to add to the distribution list.

2. Towards the bottom of the Contact Distribution Lists form you will notice a grouping of buttons headed Contact Distribution Lists. Click the **Add To button or AltO**.
3. A window titled **Select a List to Add the Current Contact** to will appear.
4. **Choose the list** you wish to add this contact to and **press enter or tab** out of the box. This contact has now been added to this list.

Adding a Contact or Subscriber to a Distribution List - from the Distribution List Management Area

1. Enter the Distribution List management area from the main switchboard by clicking Distribution Lists. At the foot of the Distribution Lists screen you will notice a number of function buttons. Choose **Add Cont (contact) or AltA**.
2. The full search screen will then be shown. **Enter the details of the contact** you wish to search the database for. (i.e. the contact you wish to add to the distribution list) and **press enter or click proceed**.
3. Contacts matching the details you entered into the search form will now be shown. Choose the contact you wish to add by clicking **Select or AltS** beside the correct contacts name.
4. You will now be returned to the Distribution List management area. There you will notice that the contact has now been added to the list as their name will be shown in the list of contacts which make up this list visible on this screen.

Adding a Group of Contacts to a Distribution List

There are many ways of adding a group of contacts to a distribution list. Two of the most frequently used methods are adding an existing distribution list to another – for instance you want to add all members of your Australian Crime Fiction distribution list to a newly created World Crime Fiction distribution list. Or alternatively by calling up a view of contacts from the stock form and adding them to a distribution list. (An example of this would be to make a view of all customers who have bought a book by a certain Australian crime fiction author and adding them to the Australian Crime Fiction list or calling up a list of all customers who live in a postcode range and adding them to an Events list.

Adding an Existing Distribution List to another Distribution List

This function can be done either from the Distribution List management area or from the Contacts form.

Adding from the Distribution List Management Area

1. **Click the Combine Lists** button which is located on the foot of the distribution management area towards the left of the screen.

2. The Combine/Separate Distribution lists form will be displayed on the form. Make sure that the **button beside Add Members of One List to Another is selected**. (A dark spot in the circle beside the words Add Members of One List to Another indicates it is selected).
3. Click the **Select List A** button. You will then be asked to choose the particular list you wish to add to the target list. The target list is the list you are seeking to add contacts to. The list you have just selected (List A) will remain unchanged.
4. Click the **Select List B** button. Select the list you wish to add new contacts to and click Proceed or AltP. **Important!** As combining lists is a very powerful operation that cannot be reversed you will be asked to **enter the User level password** at this point. It is important to be sure you have chosen the correct lists and that you have correctly chosen which list to add to which at this point. If in doubt just press the Esc/Escape key or click cancel to return to the previous screen where you will be able to review your choices.

Clever BookMine! BookMine “cleverly” checks to make sure that the contact you are adding to your email distribution lists have valid email addresses. As the contacts are added it checks that all contacts being added have valid email addresses. If you are adding a distribution list which contains contacts without valid email addresses to an email distribution list you will receive a warning message with the opportunity to alter any records where the email address doesn’t conform. You may choose to make these alterations or ignore the message, however if a contact is added to an email distribution list without a correct email address naturally this contact will not be able to receive your message though they will be showing as a member of the list.

Adding from the Contact Form

Choose the Combine Lists button/Alt^I from the Distribution Lists grouping towards the left hand foot of the contacts screen and follow **Steps 2 – 4 for Adding a list of contacts from the Distribution List Management Area**

Maintaining Distribution Lists

Suspending Membership of a List

From time to time contacts will ask to be **removed** from your lists for a period (for instance when they are on holiday) or permanently. In BookMine you suspend members from lists rather than deleting them. Optionally you can specify a date for them to be automatically reactivated to the list. Suspending rather than deleting ensures that in future they are not inadvertently re-added to the same list/s again. If you attempt to re-add them to a list a warning will be displayed. You can of course override this if you want to. It is important for good customer relations that these requests are carried out as a matter of priority. Fortunately this is a simple matter in BookMine.

Suspending/Removing a Contact from a Distribution List

1. On the main contact form call up the contact whose subscription you wish to suspend.

2. Click the InLists button (which should be red if they are currently subscribed to one or more lists). All the lists they are subscribed to, or are suspended from will now be displayed on the screen.
3. To suspend a single member from a distribution list click the **Suspend button** adjacent to the list. If you would like to suspend the subscriber from all lists click the **Suspend All** button at the foot of this window. You can optionally select a date when they will automatically be reinstated. This is ideal for people who do not wish to be communicated with while on holiday.

Dealing with Email Bounce backs

As you build and use email distribution lists you will notice that you frequently receive bounce backs or emails that have been returned to you as undeliverable. The reasons for bounce backs are numerous but it can indicate that the contact has changed email addresses or is not using the email address you have recorded for them.

How you wish to handle this situation is a decision your business needs to make. Do you open each one and remove the contact from the list if no longer a valid email address or do you filter them into a box and bulk delete them without making note of whose email address is currently either temporarily or permanently out of action? Both have their pros and cons and it is not for BookMine to dictate the way you handle this situation.

If you decide to keep your database maintained it is worth working on your bounce backs very regularly – for instance on a daily basis. A suggestion of how to do this follows:

- Open each email and copy the email address or addresses that are reporting as un-delivered.
- Go to the relevant contact record and either suspend this contact from the list/s, or if only a temporary failure or you think it might be, insert a saved piece of text into the comments field explaining that the email bounced on this date. If the next email you send also bounces back you can suspend them from the list but you will not have lost contact with a customer the cause was only a temporary glitch somewhere on the internet.

Maintaining accurate up to date records involves effort but it means that you and even your newest staff member can make fully informed decisions even if you don't really know how many emails are getting through. A quality, accurate, customer list pays dividends in sales and is also a distinct selling point should you ever offer your business for sale.