



VerticalResponse – Application Overview

I. Introduction

The VerticalResponse API opens up a world of possibilities to organizations that want to extend the functionality of VerticalResponse and integrate direct marketing into their current development efforts. This document will provide an overview of the features & functionality of the VerticalResponse email marketing platform. It should benefit individuals who are new to the product and want to better understand how to build a solution around it.

II. Overview

The VerticalResponse platform offers email & direct mail marketing services. With our email marketing service, you can create and send email campaigns to your customer base. Using our direct mail marketing service, you can create and send postcard campaigns via the US postal mail.

(At this time, only email marketing functionality is available via the API. You can upload customer lists which contain the mailing addresses for postcard campaigns, but you must create and launch those campaigns via the VerticalResponse website.)

Using the email marketing platform, you can send emails to your customers and readers who have **opted-in** (i.e. agreed to) to receive communications from your organization. Please note that VerticalResponse enforces a strict anti-spam policy and we prohibit the use of third-party, purchased, rented, or harvested mailing lists. Please refer to our [Terms of Service](#) for more information.

There are three main sections of the VerticalResponse email marketing platform (which are described in detail in the rest of this document):

- List Management
- Campaign Management
- Campaign Reporting

III. List Management

General Info

- √ In VerticalResponse, recipients (i.e. your customers) are stored as individual records in lists. All campaigns sent using VerticalResponse must be associated with one or more lists.

There are three types of lists in VerticalResponse:

- **Email** – These lists can only be used for email campaigns and require each list member to have a unique & properly formatted email address.
- **Postcard** – These lists can only be used for postcard campaigns. List members must contain mailing addresses that are valid US Postal addresses.
- **Email & Postcard** – These lists can be used for email & postcard campaigns. List members must contain mailing addresses that are valid US Postal addresses and must meet the email address requirements for Email lists.

- √ All lists have both standard field names & over 200 (optional) custom field names. Both standard & custom fields can be used to personalize a campaign per recipient. Fields used in campaigns are called Merge Fields.

All custom field names can be defined when the list is created or when data is appended to the record. The standard field names listed here are reserved (i.e. cannot be added again into a list as custom field names), but most of them can be used to store list data:

FIRST_NAME	WORK_PHONE
LAST_NAME	FAX
EMAIL_ADDRESS	MARITAL_STATUS
TITLE	GENDER
COMPANY_NAME	RECORD_STATUS
ADDRESS_1	OPTIN_STATUS
ADDRESS_2	LIST_ID (internal use only)
CITY	ID (internal use only)
STATE	IP_ADDRESS (internal use only)
POSTALCODE	TIMESTAMP (internal use only)
COUNTRY	HASH (internal use only)
MOBILE_PHONE	ADDRESS_HASH (internal use only)
HOME_PHONE	

- √ Each record in an Email or Email & Postcard list has an opt-in status field that you can set manually. Depending on the status, the recipient may or may not receive campaigns that you send to them. The status can be one of the following values:

Record Statuses that Can be Mailed to:

- **Manually Uploaded (default)** – This is the default status for all newly created records.
- **Double Opt-in** – The recipient signed up (via an web opt-in form) to receive email communications and clicked on the URL inside the confirmation email they received.

Record Statuses that Cannot be Mailed to:

- **Single Opt-in** – This recipient signed up (via an web opt-in form) to receive email communications, but has not yet confirmed their email address. They would do this by clicking on the link contained in the confirmation email they received after signing up.
- **Suppressed** – This is meant to be a transient status which you set on a per list basis
- **Bounced** – Email sent to this address has been returned to us for one of several reasons (e.g. mailbox limit reached, recipient's mail server is unresponsive)
- **Unsubscribed** – The recipient can unsubscribe from mailings by clicking on the unsubscribe link which is present at the bottom of every email.

Additional Notes:

- ✓ When adding records to a list, recipients who have unsubscribed previously will automatically be removed from the list before it is added to your account.
- ✓ Lists associated with campaigns that have been launched and/or have been approved are locked and cannot be edited. If the list is associated with an opt-in form, however, new signups will continue to be added to the list in this situation.
- ✓ Lists associated with VerticalResponse opt-in forms cannot be deleted until the opt-in form is deleted. The opt-in form can only be deleted from the web interface of the VerticalResponse application.

IV. Campaign Management

General Info

- √ Email and postcard content is stored in VerticalResponse as a campaign. A campaign consists of the copy (i.e. HTML or text content) and some relevant attributes (e.g. the Postal Address, the launch date).

A campaign can potentially progress through one of several stages. They are represented by the following list of statuses:

- **Active** – This is the default status for all newly created campaign.
- **Pending Approval** – This campaign has been launched and is awaiting review by VerticalResponse. (All campaigns are subject to review by VerticalResponse prior to being sent.)
- **Pending Launch** – This campaign has been approved by VerticalResponse and will be sent at the specific launch time.
- **Mailing In Progress** – This campaign is currently being sent out to the list(s) of recipients.
- **Sent** – This campaign has been sent to the list(s) of recipients. Campaign response statistics will be made available for download on a periodic basis.

Creating a Campaign

- √ Campaigns can be created by starting from scratch or by copying one that already exists in your account. Either way, you start the campaign creation process by giving the campaign a name.

From label & Subject line

- √ During the creation process, you will need to set the From Label of the campaign. The label should represent the organization or individual that the email is coming from. An example label, “XYZ Corporation” is shown below. (The ‘XYZ_Inc’ portion of the email address derived from the company name used to create the account with.)

From: “XYZ Corporation” <XYZ_Inc@mail.vresp.com>

The subject line should reflect the content of the message. This is one of the requirements of the CAN-SPAM act that VerticalResponse checks for when reviewing launched campaigns.

Text/HTML emails

- √ If you want to send a campaign with HTML content, you’ll need to provide the HTML content as well as text content. When VerticalResponse sends email to a recipient, both the HTML & the text version are sent. The email client will determine which version of the email should be presented to the end user. If you are sending a text based campaign, you only need to define the text content portion of a campaign.

Merge fields

- √ You can merge data from your mailing list into your campaign using merge fields in your content. Merge fields are marked off using curly braces and can be used in the Subject Line

and the email body content. You can use custom fields from your list as merge fields. Please note that merge fields will not properly be substituted

- a) your recipient has no value defined for that field or
- b) one of the lists that you're sending this campaign to does not have this field defined.

Here is an example of how to use merge fields in your content:

Subject: 20% Off Coupon for you {NICKNAME}!

Body:

Hello {FIRST_NAME},

Thank you for your recent purchase, {LAST_PURCHASE}. We wanted to show you our appreciation with a 20% off coupon that you can use on your next order!

We're planning to send your coupon to:

{ADDRESS_1}

{CITY}, {STATE} {POSTAL_CODE}

{COUNTRY}

Email footer

- √ All email sent through VerticalResponse must be compliant with the CAN-SPAM law. Accordingly, you need to specify a valid postal address for your organization which will be appended to the end of the email.

Additionally, an unsubscribe message & link must be present in the footer. You have the option of changing the default message & link text – provided that a) the message informs the recipient that they can opt-out of future mailings and b) the link text is one of several pre-approved choices.

Default message: If you no longer wish to receive these emails, please reply to this message with "{UNSUB_LINK_TEXT}" in the subject line or simply click on the following link:

Link choices: Unsubscribe, Opt-out, Leave this list, No More Email, Remove Me, Remove, Take me off this list, Stop receiving mail

You also have the option of including a “Forward to a Friend” link in your email footer. A recipient can click on this link to send a copy of the email to a friend. The friend is not automatically added to the mailing list – but they are provided with instructions on how to sign up for future mailings.

Launching a Campaign

√ Besides defining campaign content, there are three additional steps required to launch a campaign: specifying a reply-to address, picking mailing list(s), scheduling a mailing date/time.

- **Reply-to address:** Each campaign must have a reply-to address associated with it. When a recipient replies to the email, all responses are sent to VerticalResponse which in turn get relayed to this address.
- **Mailing list(s):** You need to pick at least one mailing list (of the Email or Email & Postcard variety) to send your campaign to. When picking this list, remember that each list should have all of the merge fields that you use in your email content.
- **Scheduled launch date/time:** You need to schedule a date & time in the future when you want campaign to be mailed. It will be sent at the time you specify unless that time is too soon before the next approval window or maintenance work prevents campaigns from launching at that launch time. (See below for more details re: the campaign approval process.) Please note that you will be notified in advance of any scheduled maintenance via email.

√ Just to review, the following actions need to be performed on a campaign before it can be launched. The minimum set of actions include:

1. **Specifying the campaign From Label** – This is the “From” name that recipients will see
2. **Specifying the campaign Subject Line** – The subject of the email should be relevant to the body of the email. If it’s not relevant, the campaign may be declined during the review process.
3. **Specifying the campaign content** – The HTML or text content to be sent to all users
4. **Setting the postal address** – Any campaign sent through VerticalResponse needs to have a valid postal address in the footer. (This is a requirement of the CAN-SPAM law.)
5. **Specifying the reply-to address** – All replies are sent to this address.
6. **Selecting the list(s) to send the campaign to** – The campaign will be sent to all recipients from all lists
7. **Setting the launch date & time** – The campaign will be queued up to be sent out at a launch time specified, pending approval by VerticalResponse.

Campaign Approval

√ VerticalResponse staff members visually review launched campaigns to ensure that the campaign is complete (e.g. includes a Postal Address) and that it adheres to CAN-SPAM requirements as well as our own policies relating to acceptable content. The campaigns are reviewed everyday of the week at the following times: 7:00am, 9:00am, 11:00am, 1:00pm, 3:00pm, 5:00pm, and 7:00pm (all times Pacific).

Please note that campaigns that are declined by the staff have their status changed from Pending Approval to Active (see status descriptions below). In addition, an email explaining why the campaign was declined is sent to the primary email address associated with the account (i.e. the email address used to log into the account).

Status of a campaign

√ A campaign can potentially progress through one of several stages, represented by the following list of statuses:

- **Active** – This is the default status for all newly created campaign. This is the only status where the campaign attributes can be edited.
- **Pending Approval** – This campaign has been launched and is awaiting review by VerticalResponse. All campaigns are subject to review by VerticalResponse prior to being sent.
- **Pending Launch** – This campaign has been approved by VerticalResponse and will be sent at the specific launch time.
- **Mailing In Progress** – This campaign is currently being sent out to the list(s) of recipients.
- **Sent** – This campaign has been sent to the list(s) of recipients. Campaign response statistics will be updated on a periodic basis and made available for download

Additional Notes

√ Recipients that appear on multiple lists associated with one campaign will only receive one copy of the message.

V. Campaign Statistics Reporting

General Info

- √ Once a campaign has been sent, response statistics (i.e. opens, clicks, bounces, and unsubscribes, and non-responders) are updated periodically. These statistics are available for download on a per campaign basis.

Response Overview

- √ There are several types of responses associated with campaign emails sent using VerticalResponse.
 - **Open** (applies only to HTML campaigns) – Recipients who view HTML campaigns (*and the images contained within it*) are tracked with an [image beacon](#). Note that open statistics are not available for text email campaigns or recipients who do not download images of an HTML email.
 - **Click** – (applies only to HTML campaigns) Links in the main content section of the email are detected during the launch process and wrapped with a VerticalResponse click tracking URL. The downloaded and online campaign statistics will show the links that each user clicked on.
 - **Unsubscribe** – Recipients who click on the unsubscribe link in the email footer or respond to the email with an opt-out request (e.g. “unsubscribe” or “opt-out”) are reported.
 - **Bounce** – If an email bounces (e.g.. the recipient’s mail server is busy/unavailable or the recipient’s mailbox is full), VerticalResponse attempts to deliver the email several more times over the course of three days. Emails that cannot be delivered by the end of the three days are reported as bounces.

If you have any questions about the VerticalResponse product or the API, please feel free to contact us at:

api-inquiry@verticalresponse.com