Getting Started with Real Magnet

Welcome to the Real Magnet community! Our commitment to you is to provide powerful email and social marketing services that are backed by excellent customer support and hosted on a stable and secure platform.

These are the key steps to getting you off to a fast and smooth start with Real Magnet.

1) Real Magnet Support Contact Information

We pride ourselves on overzealous (and free) customer support. Please use it!

Our main support hours are 7 am – 10 pm EST (plans are available for customers who require overnight service).

- **Support** – support@realmagnet.com or 301-652-5074

- **Training** – ccurtin@realmagnet.com or 301.652.4025 x111

- **Graphics** – graphics@realmagnet.com or 301.652.4025 x118

- **Billing** – michelles@realmagnet.com or 301.652.4025 x129

- **Sales** – sales@realmagnet.com or 301.652.4025

Please remember to always include your account number in correspondence emails!

2) Need Templates or Other Custom Features?

Certain Real Magnet services require custom development and/or design work - the most popular being branded templates and registration pages, subscription pages, and forward-to-a-friend landing pages.

Since these items take time to develop, it's best to get started on them right away! To do so, contact Michelle Srnecz at 301-652-4025 ext. 129 or email michelles@realmagnet.com.

Need some ideas or just want to see some of our work, click here to see some samples.

3) Training and Educational Resources

The more you know about Real Magnet, the more value you'll derive from our services. Take full advantage of these resources!

- **Live, Dedicated Training** – Real Magnet can customize training programs for your organization. These sessions are normally conducted via webinar, and may come with an additional fee.

- **Real Learning Center** – This is a free resource where you can view training videos, documentation, and other resources to get up-to-speed quickly. Click the "Real Learning Center" link on the Real Magnet home page to access the portal.

- **Monthly Webinars** – Each month, Real Magnet offers no less than 3 training webinars. The webinars are free, but registration is required. You'll find the schedule and registration links on the Real Magnet home page under "Upcoming Events".

- **Help Site** – In the top right corner of every page in Real Magnet is a "Help Me" link that directs users to the Real Magnet Help Site.

- **The Real Insights Blog** – Stay current on new features, company news, marketing and technology trends, and Real Magnet's thought leadership by visiting blog.realmagnet.com

4) Managing Usernames and Passwords

Real Magnet's policies on usernames and passwords are designed to prevent unauthorized access to your account and to protect your data. Here are the basics:

- ONLY Real Magnet can create a new user for your account.

- To create a new user, contact support at (301-652-5074) or email support@realmagnet.com

- The username MUST be the user's email address.

- Once created, you'll receive an email from us that includes the new user's username and a randomly selected password. Users can change their passwords anytime by going to: Tools> Account Management>Change Password.

- For security purposes, passwords are encrypted in Real Magnet so we cannot tell you what a user's password is.

- It is a best practice to disable a user when he/she leaves your organization. You can do this by either logging in as the user and changing the password, or contacting Real Magnet support (301-652-5074 or email support@realmagnet.com).

5) Unique Identifier

Setting up a Unique Identifier is easy, but changing it post-launch is not. Every database-driven system (including Real Magnet) has a way to enforce uniqueness on records to avoid duplicates. Real Magnet offers two options for determining uniqueness: *email address or custom ID*. *The default is email address*, meaning that Real Magnet will create one record only for any single email address.

The custom ID option lets you choose any values you'd like for IDs. This is particularly useful for users of any Real Magnet CRM/AMS/API integration as it allows you to use your main database's ID system as the Unique Identifier in Real Magnet.

Not sure what's best for you? We can help. Contact Real Magnet support to arrange a discussion with one of our Account Specialists.

Understand Your Unsubscribe Setting

The last thing you want to do is send messages to recipients who have unsubscribed. Therefore, it's critical to understand how your unsubscribe setting operates.

The following is a brief description of the options that are available to you:

- **Unsubscribe from Group Only** – *This is the default setting*. If a recipient clicks unsubscribe, he is unsubscribed only from the group the message was sent to.

- **Unsubscribe from All Groups** – If a recipient clicks unsubscribe, he is unsubscribed from ALL groups in your account - both existing and future.

- **Unsubscribe Categories** – You can create unsubscribe categories (e.g. newsletters, promotions, etc.) and associate multiple groups with it. If a recipient unsubscribes from one group in the category, he will be unsubscribed from the other groups in the category.

- **Manage Your Own Unsubscribe** – You can use your own unsubscribe link to manage the unsubscribe process on your system.

For a more comprehensive look at Real Magnet's unsubscribe options, please take a look at our guide to Understanding Real Magnet's Unsubscribe Settings. You can view your unsubscribe setting (and all other elements of your account profile) by clicking the *Account Profile* link on the Real Magnet home page.

Setting Up Do Not Send and Suppression Lists

Most new customers have maintained a Do Not Send List (aka suppression list) in their previous system. It's easy to port over this list to your Real Magnet account.

1. Organize the suppression list into a .CSV file. The list should have only one column for email addresses (or fax number if you're using our fax functionality and want to suppress a recipient from receiving a fax).

2. Go to Tools>Suppression>Upload a suppression list.

3. Follow the step-by-step instructions displayed on the suppression list upload page.

Once a recipient is suppressed, he will no longer receive messages distributed from your account. Individual recipients can be suppressed, or un-suppressed, via the "Modify Suppression Status" icon on the individual record page.

6) Creating Pre-Defined From Fields

This feature allows managers to create pre-defined "from" fields that a user must choose prior to sending. Consistent use the same "from" field has both deliverability and branding benefits. To manage pre-defined from fields, go to: Tools>Message Tools> Pre-defined "From" Address.

Example of Pre-Defined From Fields on the Send to Group Page

We recommend configuring vanity-style "from" addresses, like those in the image above. This lets you customize what recipients see in their inbox, while also providing a response mechanism for replies. To create a vanity email address, use this *exact* formatting:

"Real Insights"<newsletters@realmagnet.com>

In the address above, recipients will see Real Insights as the from field in their inbox, and replies will be returned to newsletters@realmagnet.com

7) Important Tools for Account Managers

For customers with multiple users and/or multiple accounts, Real Magnet has tools to help managers organize and maintain control over their account activities. These include:

·   **Enterprise Account** – All of your user's work in a single account. Account managers can create teams (e.g. marketing, editorial, conferences) whose members only see and access their own team's messages, tracking, and other assets.

·   **Subaccounts** – It may make sense for your organization to have multiple accounts that are associated with your main account, but completely independent of each other.

Click here to learn more about the Enterprise vs. Subaccounts account structure.

·   **Permissions** – Managers have the capability to grant or deny a user's access to any feature and/ or function in Real Magnet. For example, you may want to bar editors from uploading lists, or or prevent sales reps from sending messages.

·   **Approved Sender** – This feature allows managers to designate users whose messages require approval prior to distribution. Any such users' messages are held in an approval queue until approved by a manager.

·   **Send Limit Rule** – This feature allows you to set limits on the amount of emails your recipients will receive over any time period you define.

8) Are You Getting The Most Out Of Real Magnet?

Real Magnet is chock-full of features and functionality. To help you become familiar with all of the features at your disposal, a customized *Account Profile Page* resides in your account. Here, you'll see everything that's available to you as well as the features that are (and are not) enabled in your account. Access the *Account Profile Page* via the link on the Real Magnet Home Page.

Some of the advanced features you may find useful are:

-   **Social Magnet**: Publish and track tweets and Facebook and LinkedIn posts directly from Real Magnet. Analytics compare the effectiveness of your social channels to each other, and to Real Magnet! Google Goals integration available.

- **CRM and AMS System integration**: Real Magnet integrates with some of the leading CRM and AMS systems. These integrations improve your workflow by eliminating the need for importing and exporting lists; give your critical tracking data that can be used to improve targeting, and synch subscription and unsubscribe between your database and email engine.

  Real Magnet currently integrates with these applications:

  - Microsoft CRM

  - Salesforce

  - Avectra – NetFORUM

  - iMIS

  - Aptify

  - TMA Resources – Personify

- **SMS Messaging:** Create, distribute, and track mass SMS/text messaging campaigns directly from Real Magnet.

- **Deliverability Testing**: Identify deliverability issues before launching your job. Tests included identifying broken images and links, Spam filter scoring, and scores of web and mobile rendering previews.

- **Survey integration:** Create professional, branded surveys in Real Magnet. We offer 9 different question types, conditional branching, in-depth tracking and reporting, and much more.

- **Events integration**: Easily create branded, credit-card enabled web registration pages for physical and online events. Key features include flexible tools for creating content, automated confirmation and reminder emails, and comprehensive event and financial reporting.