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Overview

MailingMaxx allows users to create and save lists of individuals in the Maxx database.

- ❑ These lists can be static (i.e. a list of random people chosen for a variety of reasons) or more often criteria-based (i.e. all members in California)
- ❑ These lists automatically create email listserves that are automatically updated each night or can typically be manually updated via an “update” in MailingMaxx.
- ❑ Staff may also export these lists to power merges to create letters, mailinglabels, blast-faxes, etc.
- ❑ Mailing Lists are also created for each Committee in the MatrixMaxx system to allow for easier broadcast mailings to these groups

Notable Limitations:

- MailingMaxx can only make lists using individuals in the Maxx database. i.e. It is not possible to upload an outside list of names/emails (i.e. from Outlook or ACT! Or Goldmine) simply to make an email list. The individuals must be records, with IDs, in the Maxx Database.

Technical Details

MailingMaxx's front end is part of the Maxx code base, allowing users to query the Maxx database to create lists of individuals. The back-end – i.e. the actual email list server software -- is powered by an open-source product called *MailMan*. One of the MatrixMaxx development team members is even actively participating in this open-source development effort, in order to help promote the features most desired by our users.

FAQ: Why MailMan and not a larger product like Lyris?

There is a tremendous price difference between these two products. Matrix is trying to keep MatrixMaxx as a relatively low-cost solution that will allow clients to create an unlimited number of email lists. In addition, the fact that MailMan is written in Python -- as is MatrixMaxx -- and is open-source allows us to do a higher level of customization and integration than would be possible with another list program. The flip-side of course is the old truth of "you get what you pay for," and Mailman does not offer as many features as some of the bigger programs, most notably the ability to merge in Names to create personalized emails.

Setting Up MailingMaxx Lists

The 3 approaches to creating lists: Criteria, Committees, Manual Additions

There are 3 main types of lists in MailingMaxx, and some look a little bit different when you see it in the MailingMaxx Search results.

1 – Static Lists

Static lists and dynamic lists are actually the same in many regards, and will look the same on the MailinMaxx Search results screen. The main difference is that the list members are selected manually instead of using dynamic search criteria. Completely static lists are rarely used by the MatrixMaxx clients. They are only used in cases where it is impossible to define database-driven criteria the individuals on this list. The two cases where we are seeing them used:

- Special Interest Lists: The association, as a benefit to its members, is allowing them to signup for lists the association hosts. These lists may be broadcast lists or discussion lists (if discussion lists, they

are more often than not moderated, so that the association can monitor/reject what is being posted)

- ❑ Friend lists. e.g. Friends of the Executive Director, Friends of the Executive VP, etc. These people often get included on special mailings and announcements for events otherwise driven by criteria-based lists.

In the case of Static lists, the nightly update checks to ensure no email addresses have changed.

2 – Dynamic, Criteria-based Lists

What we are finding with most of our Maxx clients is that 90% of your lists will be dynamic, criteria-based lists.

Example: All Active Members in California, All Individuals with a job function of “Executive Management,” etc.

Once the list criteria are properly setup, you shouldn’t need to return to the list setup, ever.

Many clients combine dynamic criteria and static members into one list.

Example: All Primary Contacts in Texas are added via dynamic criteria. Plus twelve individuals are manually added to the list.

General Facts/Tips on Dynamic Lists:

- ❑ All lists are “dynamic” by default
- ❑ Even if a list is dynamic, you may still add people manually to it. The most popular use of this is adding particular staff to the various members-only lists.
- ❑ Dynamic lists are updated each night automatically, and you as a user are able to update them manually using the “update” link on the search results page.

Choosing Criteria for your Dynamic List

The criteria that you choose are up to you, but we would make the following suggestions for any criteria you use:

- ❑ Personal Status = Active Staff, Former Staff, Retired (i.e. all the statuses but deceased)
- ❑ Company Status = Active (as opposed to out of business or any of the other non-active status)

3 – MembershipMaxx Committee-Generated Lists

When staff members create committees in MembershipMaxx, these committees automatically generate associated email lists in MailingMaxx, assuming that the staff fill in the List Name field.

In the current version of MembershipMaxx/MailingMaxx Committees, the list settings are controlled at the implementation level.

i.e. All committee lists are broadcast or all committee lists are discussion lists (see below for more on these terms). Almost all of the Maxx clients have these lists set to “Broadcast” with “All Staff” as the posting option.

Once a committee has been created, you may edit the default settings from the committee view page. i.e. Set Committee B to be a discussion list instead of a broadcast list.

Since the e-mail setting of the committee are overwritten nightly, if you need to have a committee list with different settings, this is how we suggest you set it up:

- Create a second list with the auto-generated list as its criteria (the lists need different names! even if only slightly different.)
- Set the second list just as you want it in terms of who can post, and use that as your main list
- This is how associations, for example, make the Board list a discussion list while all of the other committee lists are generated by MatrixMaxx as broadcast lists.

In the MailingMaxx search results, a committee list has no update/edit links because it is controlled by the committee in MembershipMaxx:

Choosing the correct options when creating an email list

The help text on the pages has been written very explicitly, and this is your best guide. If you have suggestions to make the help text better/clearer, PLEASE let us know.

Broadcast vs. Discussion

In general, most associations create **Broadcast Lists** as opposed to **Discussion Lists**.

- Broadcasts lists allow staff to send messages to the list, but recipients cannot post to the list themselves.
- Discussion lists allow the recipients (also known as the list members) to post and therefore discuss topics among themselves.

Discussion lists are not used frequently by associations – particularly the Trade associations – due to concerns surrounding anti-trust and monopoly issues. When they are used, they are typically *moderated*, meaning that an administrator must manually review and approve every posting to the list.

The Administrator

Every list in MailingMaxx must have an Administrator. The Administrator is someone in the database who has a valid email address. This is typically a staff member in charge of this list.

The key functions of the administrator:

- The administrator gets the list bounces. So many organizations tend to give each list two administrators: the “owner” of the list, and the membership staff person responsible for updating member data. The key is to make sure that **someone** on staff is taking action based on the bounces ... i.e. contacting these individuals to update their information in the database. Otherwise, the bounces will continue.
- The administrator is the one who serves as the moderator if a list is set to be a moderated discussion list.

Hint:

Some associations create a fictional Staff member named “List Admin” or something similar to be the administrator of their lists. The association sets-up a mailbox that multiple staff members can access as this staff member’s e-mail address in MatrixMaxx. This makes it so that the responsibility may be shared and the administrator does not need to be changed when a staff member leaves.

Archives

By default archives are turned off in MatrixMaxx. An archive is a collection of all messages sent to the list. This collection is stored on the server and made available to users. By default this is turned OFF for all Maxx clients. If this is of interest to you, please contact Matrix. Archives incur an extra hosting fee as the space required for such collections is very large.

User Walkthrough Scenario 1: Creating the “All Members” broadcast list.

The first list that every association wants is the “All Members” list ... they want to send updates and announcements to all of their active members. Who wouldn’t?

Here is a walkthrough of the setup of such a list ...

- Link into MailingMaxx
- Search for possible existing lists that might be the same as the one you are about to create, to try to prevent duplicate lists of the same criteria (For example, in creating a Member List, I would first search for the key word “member” to see what came up.)
- Assuming the list does not exist, you want to Add a New List.
- The first page is a variety of setup fields:
 - **List Name:** I set list name to be something clear and simple, like *all-members*. Please read the help text carefully, as the list name

you select is important. Once you select your name, MailingMaxx will automatically add your association's acronym and your domain, to create the email list itself.

Example: you type list name of *all-members*, and the list address is generated as: ACRONYM-all-members@domain.org

- **Short Name:** This field is rarely used. If filled in, the subject line of every message sent out by this list will have the Short Name prepended to it. Mostly used by huge, high volume discussion lists to help users be able to filter list traffic.
- **Short Description:** This field is used in several display places in MatrixMaxx, and also shows on the WWW side if the association chooses to allow users to sign up for lists.
- **Long Description:** This field shows up in the MailingMaxx search results, so please make it as clear and detailed as possible, so that other staff and future staff will understand what this list is and what it is used for.
- **Moderated:** As I am building this as a broadcast lists, this field is non-applicable, so I tend to leave it set as "No"
- **Administrator:** I use the FIND function to find my administrator(s) in the database. *IMPORTANT! Administrators are not list members!* If you want the Administrator to also receive list messages, they need to be added to the list as members, either manually or via a criteria.
- **Join Rules:** Since I am creating a broadcast list based on criteria, I want to make this a *Closed* list. I don't want individuals subscribing to this list on their own!
- **Access Rules:** As I am creating a broadcast, criteria-based list, with *Closed* Join Rules, the Access Rules really aren't applicable; just leave it as *Public* Access. The only type of closed list that would benefit from this would be a static (not dynamic) list where you wanted to make sure that non-members didn't receive email, without you manually taking them off. In this case, you could make the list *Association Members-Only Enforced*. This is non-useful for a criteria-based list, because if you want a criteria-based list to be members-only, you simply make that part of the criteria!
- **Who can Post:** Probably the most important field in the setup! To make it a broadcast list, I need to pick *Designated Staff* or *All Staff*.
 - *Designated Staff:* To use this option, you need to pick every individual in the database that you wish to give posting rights to. Although called "All Staff" it doesn't need to be staff members. Also, make sure that the address in the database is the address the user wants to post from! i.e. If Jane wants to post from jane@association.org, but the address in the database is jane@gmail.com, then she won't be able to post from the association account.

- *All Staff*: By selecting this option, you are giving any individual who is attached to the association's record in the Maxx database the ability to post to this list. Currently, this is one association record. Because some associations are sharing the database with sister organizations, we are looking at the ability to designate the company/organization to pull from, but at this point you must be attached to the main association to be considered "All Staff."
- The second page includes more setup Options for the list:
 - **Ignore Don't Email**: I recommend you leave this UNCHECKED. Most Maxx clients have a field in the individual demographics page that allows you to set this individual as "Don't send me email" and if checked as such, email to them from MailingMaxx will be suppressed. (Although, they will still be on the list for export purposes.) The only time you'd probably want to CHECK this is if you are creating a renewals/billing list or some type of emergency alert list.
 - **Show on Member Participation Report**: If your organization has purchased the "Member Participation Report" (a.k.a. The Holy Grail Report), then you may use this box to designate if you want this list to appear in the report.
 - **Message Footer**: If you want a particular message (marketing text, legal text, website ad, etc) on the bottom of every message sent to the list, add it here.
 - **Reply-To Destination**: With a broadcast list, I want to set this as *Poster* or *Specific Address*. I do NOT want to set it as *List* unless I am creating a discussion list.
 - **Reply-To Email Address**: Only fill in this option if you choose *Specific Address* above. This is often used to have a general alias, like info@association.org, be the reply-to address.
- Once I save the second page, I am now on the main list view page. Now, I am going to add people to my list
- First, I am going to add my Active Members as **Dynamic Criteria**
 - Link to Add New Criteria
 - You'll now see the same search you use in InfoMaxx, but now it is tied in with MailingMaxx.
 - Perform your search. To create the "All Members" list, I am using the following criteria:
 - Personal Status = Active Staff, Former Staff, Retired Staff
 - Company Business Status = Active
 - Membership Status = Active
 - Click the "Search" button
 - Your results will show up. If they look good to you, go ahead and give this criteria a name and use the "Save Criteria" button to save the search into the list.

- imported people) or added via criteria (i.e. the people who purchased the book via CommerceMaxx since august)
- At this point, simply click the "Remove" link on the far right.
- The list will regenerate at this point, and this person will now be tagged as excluded from the list.
- To see who has been excluded from the list, go back to the main view/edit page (fastest way is to click "Cancel" at this point) and click the "Show/Edit All Individuals Manually Excluded" link
- OPTION 2: To remove/exclude many people at the same time:
 - Click "Show Full List" near top of page
 - Click the "Use Shopping Cart" button at the bottom of the page
 - The whole list gets loaded up, alpha by last name, into an interface that allows you to tag multiple individuals for exclusion at one time. (So you need to have the people you are removing alphabetized by last name.)
On this list, the first page or two looks very odd, because of some weird data. It looks like fake people, mostly, probably imported from the old database.
 - Use the "View Next 50" button at the bottom of the page to move through the pages of people.
A "C" or an "M" on the far right of their row indicates whether they were manually added to the list (i.e. the imported people) or added via criteria (i.e. the people who purchased the book via commercemaxx since august)
 - When you get to the first page that has someone on it that you wish to exclude ...
 - Change the radio button next to their name the second column: the one labeled "Exclude"
 - Do the same for anyone else you need to exclude on that page of 50
 - Then, to move forward do NOT click the view next 50 link, because your changes will not be saved. Instead, use the button at the top of the page marked "Save Adds/Excludes Marked/Go to Next" ... choosing the button that ends with "Go to Next" is key as it saves your changes and takes you to the next page.
 - Repeat this process until you have excluded everyone who needs to be excluded.
Once you exclude the last person, you can use the "Save Adds/Excludes Marked/Done" button, which will take you out of this form.
 - To see who has been excluded from the list, go back to the main view/edit page (fastest way is to click "Cancel" at this point) and click the "Show/Edit All Individuals Manually Excluded" link

Once Excluded ...

- If you check the excludes at this point, when you are done, all of the individuals you excluded should be in the “Show all Excluded Individuals” list
- If Email is sent to the MailingMaxx email list generated by this list, these people will NOT receive the email
- If export is done of this list, this person will NOT be in the export

Using Lists

Sending messages to a MatrixMaxx List

Sending message in MailingMaxx is very easy and just like sending any e-mail message. To send a message to a MailingMaxx list, simply copy the address of the list from MatrixMaxx and paste it into the “to:” field in a new message window of your e-mail program (Outlook, Thunderbird, etc.). Write your message and then click send.

Note:

Do not “BCC:” anyone when sending to a MailingMaxx list. This creates an error and causes the message to not be delivered correctly.

Moderated Lists

When a message is sent to a moderated list it must first be approved by a list administrator before being sent to the members of the list. All list administrators will receive an e-mail notice that a message is awaiting approval. To approve this message, go to the list view page in MatrixMaxx and click the “View Moderation/Administration Queue” link.

Note:

All messages sent to a moderated list will be held for approval, including messages from the list administrators. This is done as a protective measure against spammers “spoofing” the administrator’s e-mail address.

Delivery Report

The Delivery Report (located in the right hand navigation in MailingMaxx) allows you to view the delivery status of previously sent list messages. You will see the date and time, the list address, the number of e-mail recipients and the number of bounces. It also lists all of the e-mail addresses that bounced, so you may fix this data in MatrixMaxx for future mailings.

This report is run several times during the day, however it is not real-time.

List Digests

List digests allow individuals subscribed to discussion lists to receive one daily e-mail with all the messages rather than an e-mail for each message as it is sent.

List members may change their subscriptions to digest using the WWW list subscription page. This is an additional option in MailingMaxx that we recommend for those associations with a lot of discussion lists.

Unsubscribe From Threads in Discussion Lists

This is an extra available option for discussion Mailing lists. If you are interested, please contact Matrix.

This provides the ability for members of open mailing lists to unsubscribe from certain threads/subject lines. [This function is not available for closed lists, as these are typically broadcasts lists controlled by staff.]

- ❑ The association MUST have the WWW List Subscription page enabled and linked to use this upgrade
- ❑ A footer automatically appears on all open list messages, with a link to 'unsubscribe'
- ❑ Clicking on the link 'unsubscribes' that email address from any messages with that particular subject line for 2 weeks.

Troubleshooting E-mail Delivery and Receipt

“We haven’t gotten the message yet...”

Matrix Group can't guarantee a delivery time. But if message is time-sensitive and you haven't seen it in an hour, it is time to start investigating

1. Has it been at least an hour? We recommend you wait at least an hour; most messages route within that time.
2. Check your sent folder: did it send properly and is list name typed properly and NOT in BCC field?
3. Check time on delivery report and see if it has routed, yet
4. Double check that you are on the list with the correct address
5. Check with others at the association on the same list; did they get the message?
6. Have your IT team check your association's virus and spam filter; the spam filter is often the issue if a list generated a lot of bounces
7. Is it possible to check with a non-association person to see if this person got the message?
8. Check Administrative queue for that list; is it being held for some reason?
9. Recheck Delivery report one last time
10. Contact Matrix Group for help

"We got this weird bounce; what do we do with it?"

If a list member tries to post/send a message to a list to which they do not have posting rights, or there is a problem with the message, they will get some type of rejection email:

Subject:
Your message to DEV-EPSSA-static-broadcast was rejected
Date:
Fri, 17 Jan 2003 11:26:01 -0500
From:
dev-epsa-static-broadcast-admin@maxx.matrixgroup.net
To:
tkennedy@matrixgroup.net

Your mail to 'DEV-EPSSA-static-broadcast' with the subject
Test1
Has been rejected by the list software.

The reason it has been rejected:
Posting to a restricted list by sender is not allowed

Please contact the administrator if you have further questions.

The reason that it has been rejected is important to read as the very first troubleshooting step.

General Tips when dealing with bounced messages:

1. Read the bounce message, carefully; typically it says the exact sender and recipient and why the server bounced it, near the bottom
2. If you aren't sure if your message itself 'bounced' or it bounced back from a list member, check the List Administration page and the delivery report to make sure that the message got sent properly
3. If the message is still unclear and/or you aren't sure if the list message routed properly, contact Matrix Group.

Here are a few common scenarios and bounce-back situations that may occur in posting to a list.

TIP: If you need to contact Matrix for help, be sure to explicitly mention that all of these potential issues have been eliminated; otherwise, you may end up with a support desk charge as we walk through these steps for you.

Issue: Individual trying to post to list receives bounce back with message:

“Posting to a restricted list by sender is not allowed”

- First, check the list setup and make sure it is what you expect it to be.
 - IF “All Staff” is selected as the setup, make sure that the individual trying to post is in fact connected as an Active Staff member or your association’s record in Maxx
 - IF “Designated Staff” is selected, make sure that the individual is on the list.
 - IF the list is generated by a committee, make sure that the setup is what you believe it to be
- Second, make sure that the individual trying to post is actually on the list.
- Third, make sure that the individual is posting from the account that is their primary email address in their Maxx record, and make sure that the account is identifying itself correctly. For example, if Jane’s record has her email address as jsmith@abc.com then she can NOT post from her yahoo account, jsmith@yahoo.com nor can she change her email settings to have it appear as jane@abc.com. The email must be coming from the exact email as it is recorded on the listserver.

Issue: Individual trying to post to list receives bounce back with message:

“Posting to an implicit destination is not allowed”

- First, make sure you did not put the list in the BCC field when sending the message. List emails can not be put in the BCC field, only the TO or CC fields.
- Second, check your sent folder to make sure that no special characters slipped into the address. In this example, the email client inserted double quotes around the list called ERIC-DCPolicyPaperTF, and the message delivery failed to this list. The delivery to all of the other lists was successful.

```
To: ERIC Board of Directors <ERIC-board@mailingmaxx.eric.org>,  
      "ERIC-DCPolicyPaperTF" <"ERIC-DCPolicyPaperTF"@mailingmaxx.eric.org>  
Cc: Mbr Delegates <ERIC-memberdel@mailingmaxx.eric.org>
```

How to stop a message from being sent

This is not typically possible, unless it is caught by our spam or virus filter, or by the list administration feature. Otherwise there is really no way for us to stop a message from going out once it has been sent.

How to report a possible issue to Matrix Group: Info, Info, Info!

1. Full Header! To, From, Date/Time, Subject + other routing info. Usually a setting in email
2. Attachments are important for us to see
3. Forward any bounces or notices to us, so we can see the full headers

Using MatrixMaxx Lists with Third Party Systems

MatrixMaxx provides integrated list functionality using the Mailman list server, but some associations like to use a 3rd party email list systems. (e.g., MagnetMail, Constant Contact, eLabs, MailChimp, etc.) When you use third party systems in conjunction with MatrixMaxx Mailing Lists, there are a few things to be aware of:

Uploading List Members to another System

One way that users often use third party systems with MatrixMaxx lists is to export a list of all the MatrixMaxx list members, upload them into the other e-mail system, then send a message from the other e-mail system. There are a couple things that MatrixMaxx lists automatically do when sending out message that you will want to make sure the third party system takes into account

- **De-duping recipients** - If you send a message to multiple lists at one time, MatrixMaxx automatically de-dupes the recipients so that the same person does not receive the message more than once. You will want to make sure that the third party system also de-dupes these recipients.
- **Not sending to individuals marked as “don’t e-mail”** – Before MatrixMaxx sends out messages to its lists, it removes any individuals who have the “don’t e-mail” flag set in their individual demographics. If you export these names and then send an e-mail from another system, these people will be sent the message unless you first sort the export by this field, and manually eliminate these people.

Sending to MatrixMaxx Lists Directly

If you choose to have your third party system send directly to a MailingMaxx list address,

- Make sure the from address in the message the system sends is permitted to post to the MatrixMaxx list
- If you have an unsubscribe link that goes to the third party system, it is not going to function properly (as MatrixMaxx is the owner of the list) and it may inadvertently send an unsubscribe notice to the entire list. Test this first, with a test list, to make sure that you don't have such an unsubscribe link being automatically generated.

Auto Footers

Your third party e-mail program may include its own footers by default. A few things to watch out for:

- The third party system may include unsubscribe links. These links, by default, will probably go to their system. If a user follows these links and unsubscribes, they will not be unsubscribed in the MatrixMaxx system.
 - This may or may not be an issue if you are uploading names, depending on how the system handles a data refresh.
 - If you are using the MatrixMaxx WWW Manage Subscriptions page, this may confuse your users. You will want to think about the user experience when deciding what to do.
- If you can edit these footers, you may wish to set the unsubscribe link to go to the MatrixMaxx WWW Manage Subscriptions page instead, if you have this feature turned on.