



Modular Mailer

Bulk Email & Autoresponder System



For use with Modular Merchant version 3

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Introduction

What is the purpose of this document?

The purpose of this manual is to provide instruction on using the *Modular Mailer* module. This includes how to:

- Create a reusable email template
- Create a chronological series of emails to be sent to customers
- Automatically sign a customer up to receive a series of emails
- Send an email to a selection of customers
- Track who's reading the emails you've sent, and which links in the email they're following
- Schedule an email for delivery either immediately or at a later date
- Use QuickCode Tags to personalize emails for each recipient

Prerequisites

The instructions in this manual assume that the reader already has a basic understanding of how to construct a Plain Text or HTML email message; including working with HTML source code, and creating links, tables, styles and images for use in email. A tutorial on this prerequisite is outside the scope of this guide. However, if you require instruction on these items, many free resources and tutorials are available on the Internet, and a variety of books are available in the computer section of your local bookstore.

Modular Mailer uses Customer Groups to determine the recipients of email messages. This manual assumes that the reader has a basic understanding of how to create and manage Customer Groups from within their store's administration area. A refresher course on Customer Groups can be found on page 36 of the *Modular Merchant Administrator's Guide*, available at:

http://www.modularmerchant.com/docs/Admin_Manual.pdf

This manual also makes use of selected Modular Merchant QuickCode Tags. A QuickCode Tag is a pseudo HTML tag developed by Modular Merchant, for use in your store's webpage and email templates. A familiarity with using QuickCode Tags is assumed.

A QuickCode Tag is formatted like this: {SAMPLE-QUICKCODE-TAG}. When viewed in a web browser, QuickCode Tags will be translated into the appropriate content. For example, {COMPANY-NAME} will display as your company's name. Various QuickCode Tags are used to display custom content in your emails. More information on QuickCode Tags can be found in the online QuickCode glossary, available at:

<http://www.modularmerchant.com/quickcode/>

Terminology: What we'll be calling things

Let's define the terms used throughout this guide:

Modular Mailer: *Modular Mailer* is the name of this add-on module in your store's administration area. It is located at: [Navigation Menu > Modules > Modular Mailer]. It is sometimes referred to as simply *Mailer* by particularly savvy members of the Modular Merchant Support Staff.

Customer Group: A Customer Group is a selection of customers that you create in your store's administration area. Customers can be appended or removed from existing Customer Groups, or added to a new Customer Group, on the *Search Customers* page in your store's administration area. A *Customer Group Editor* is also available in the *Groups & Zones* section of your store's administration area.

Email Queue: Every email that is created by *Modular Mailer* has a delivery date assigned to it – even if that delivery date is "now". Emails with a delivery date in the future are stored in your store's *Email Delivery Queue* until they are due for delivery. The emails in the Queue can be searched, reviewed, put on hold or deleted.

Email Template: Every email delivered by the *Modular Mailer* system is based on a template you create. Templates contain the email's contents, such as: who the email is from, the subject, text-only version of the message, HTML version of the message, and more. Each email message can have its own template. Multiple emails can also share the same email template.

Email Series: A Series is a group of emails that will be delivered in chronological order. Each email in the series is referred to as a "Step". Use the *Series Editor* in the *Modular Mailer* administration area to create and manage email series.

Series Step: A Step refers to an individual email included in an Email Series. Each email in the series is a separate step. Each step has its own scheduled delivery date, which can be minutes, hours, days or even weeks apart. Use the *Series Editor* in the *Modular Mailer* administration area to manage the steps within an Email Series.

Email Instance: An *Instance* refers to an email message, or group of email messages, that have been scheduled for delivery to its recipient. Emails that are scheduled for delivery on a future date become an Instance as soon as they enter the *Email Queue*. Emails that are scheduled to be delivered immediately (and thus never wait in the Queue) become an Instance as soon as they leave the server on the way to their recipient.

QuickCode™ Tag: A QuickCode Tag is a pseudo HTML tag developed by Modular Merchant, for use in your email templates. A QuickCode Tag is formatted like this: {SAMPLE-QUICKCODE-TAG}. When used in an email message created by *Modular Mailer*, QuickCode Tags will be translated into the appropriate content. For example, {COMPANY-NAME} will display as your company's name. Many QuickCode Tags are available for displaying such things as the recipient's name, email address, billing address, etc.

Modular Mailer Module Overview

What does this module do?

The *Modular Mailer* module is designed to allow the admin to do several things:

- send a single personalized email message to a selection of customers (such as a newsletter),
- create a series of personalized email messages that a customer will receive at specified dates,
- automatically sign a customer up to receive a series of emails when they perform certain tasks, such as when they purchase a specified product (also known as an “autoresponder”).

For instance, the examples throughout this manual will use a fictional store selling cat care accessories to demonstrate *Modular Mailer’s* capabilities. In this vein, *Modular Mailer* could be used to do the following...

- Send a monthly newsletter to all the customers in the store.
- Send an email advertising a special on cat leashes to all the customers who purchased a cat collar within the past 90 days.
- Create a pre-made series of emails containing cat care tips that will automatically be sent to customers once a week over the next several months when they purchase a specific brand of cat food.

What else does this module do?

Whenever possible, this module will also track statistics about the emails it sends. Information such as which email instances have been opened by the recipient and which links in the email they’ve clicked on will be recorded in your store records. This data is recorded in real-time, and can be reviewed at any time in the *Reports* section of the module’s administration area.



Note: Certain email applications will block this sort of tracking mechanism. However, if allowed by the recipient’s email program, *Modular Mailer* will track this information.

The availability and installation of the *Modular Mailer* module

The *Modular Mailer* add-on module is located in the *Modules* section of your store's administration area. (Located at: [Navigation Menu > Modules > Modular Mailer].) To coincide with anti-spam and other security precautions, several requirements must be met in order for the *Modular Mailer* service to be available in your account:

- *Modular Mailer* requires account **activation**.
(It is not available during an account's free trial period.)
- *Modular Mailer* is available with **Marketplace 10K** and higher accounts.
(It is not available with Marketplace 1K and Marketplace 3K accounts.)
- *Modular Mailer* requires a **hosting** account.
(It is not available while a store is hosted in the "modularmerchant.com/clients/" starter area. This is because a dedicated IP address, which is included in a hosting account, is required.)

When the above requirements are met, then the *Modular Mailer* module will automatically install itself in your store's administration area, unlocking the module's admin tools and adding several new options to the Product Editor. Once it is installed, it is ready to use.

Sections of the *Modular Mailer* module administration area

Location of Administration Tools

The *Modular Mailer* module's admin tools are located in your store's administration area at: [Navigation Menu > Modules > Modular Mailer]. The module's home page is at this location. The module home page looks like this:



Modular Mailer

Modular Mailer is an email management system that provides tools to send a bulk email message to a group of customers. It can also be used to create a series of emails that are sent in chronological order. The tools available in *Modular Mailer* will allow you to remain in contact with your customers long after their original sale.

Modular Mailer Sections



Modular Mailer Manual

The *Modular Mailer* manual details all the features and options available in this module. Get the tools you need in this guide. **Read this first!**



Email Delivery Queue - 4 messages in Email Queue.

The *Email Delivery Queue* contains outgoing messages that are scheduled for delivery.



Email Template Editor

Every email that *Modular Mailer* sends is based on a template. Use the *Template Editor* to manage the emails that will be delivered. **The *Template Editor* can also be used to send an email to a group of customers.**

Create a NEW email message template ▼
Go to Template Editor



Email Series Editor

A series is a group of emails that will be delivered in chronological order. Use the *Series Editor* to manage the email series you've created.

Create a new Autoresponder Series ▼
Go to Series Editor



Send an Email

Use this tool to quickly send an email to selected customers. Select the template to use for your email message, then select the **Customer Group(s)** to send the message to. You'll have a chance to preview your message before it is sent.

Step 1: Select an email Template

Create a NEW email message template ▼

Step 2: Select Customer Group(s) to send the email to

Select the Customer Groups that will receive this email message. Click the ">>" button to add selected Customer Group(s) to the list of recipients. Customers in multiple Groups will **not** receive duplicate emails.

Unselected Customer Groups
These Groups will **not** receive this email.

All Customers (12345 members)

Cat care professionals (42 members)

Dog owners (140 members)

<<

>>

Recipients
These Groups **will** receive this email.

Preview & Send this Email



Reports

Review statistics about the emails that have been sent to customers.

Let's look at each of these sections in more detail:

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Modular Mailer Manual

This is a link to the document you are now reading. Thank you for taking the time to read the manual. As the author of this manual, I can tell you that you've made my day.

Email Delivery Queue

The *Email Delivery Queue* (or simply *Email Queue* as it's known by its friends) contains all the outgoing email messages that are scheduled for delivery.

Search Email Queue

Find messages where Recipient Email contains @ Go
added to queue between the dates Feb 04 2005 & Feb 04 2011

Modular Mailer Email Queue
4 results returned.
Check All | Check None

Queue SID ▼ ▲	Date Added to Queue ▼ ▲	Recipient Name & Email ▼ ▲	Series & Series Step ▼ ▲	Email Template ▼ ▲	Send Date ▼ ▲	Hold ▼ ▲	✓
448	1/31/2008 7:48pm PST	Tester McTester tester001@modularmerchant.com	Series SID 1 1 of 5	String: It's not just..	4/17/2008 10:48pm PST		<input type="checkbox"/>
449	1/31/2008 7:52pm PST	Tester McTester tester001@modularmerchant.com	Series SID 1 1 of 5	Can your cat predict..	4/17/2008 10:52pm PST		<input type="checkbox"/>
450	1/31/2008 7:57pm PST	Tester McTester tester001@modularmerchant.com	Series SID 1 1 of 5	Furballs: A Survivor's...	4/17/2008 10:57pm PST		<input type="checkbox"/>
451	1/31/2008 8:00pm PST	Tester McTester tester001@modularmerchant.com	Series SID 1 1 of 5	Understanding your..	4/17/2008 11:00pm PST		<input type="checkbox"/>

Options for what to do with the checked (✓) rows above... Put on Hold Submit

The sections of the *Email Queue* include:

Search Email Queue

A variety of search tools are provided to help you track down the queued emails you seek. **Tip:** To view all the emails in the queue, search for *Recipient Email contains "@", added to the queue* between the dates *January 1, 2007 & December 31, 2015*. That's a quick way to find all the emails that are present in the Queue.

Modular Mailer Email Queue (Search Results area)

The queued emails that match the search criteria will be displayed here. Click one of the gray arrows below the column titles to sort by that column in either ascending or descending order. The search results will display 100 results per page. If more than 100 results are returned, links to each page will be displayed at the bottom of the Search Results (not displayed in the above image).

Queue SID

System ID (SID) of the Email Queue database record. This number is assigned automatically by the *Modular Mailer* software. It is used for internal tracking purposes and cannot be edited.

Date Added to Queue

This displays the date and time the email message was added to the Email Queue.

Recipient Name & Email

The name and email address that will be used as the recipient of the email. Click the customer's name to view their *Customer Details* page. **Note:** Any "test emails" – an option available when manually sending out an email instance – in the Queue do not have a name associated with them, so they will list the email address only.

Series & Series Step

The System ID (SID) number of the Email Series associated with this email. (If any.) Click on the Series SID to open it in the *Series Editor*. Also displayed is the specific step of the Email Series for this email.

Email Template

Displays the name of the template that will be used to generate this email. Click the template name to open it in the *Email Template Editor*.

Send Date

The date and time the email is scheduled to be delivered to the recipient. Typically, *Modular Mailer* scans the *Email Delivery Queue* for due messages every 15 minutes, and delivers a batch of emails that are due for delivery. The number of emails delivered in each batch may vary; because servers often throttle the amount of resources given to email delivery, to keep the server running at its tip-top capacity.

Hold Status

Messages in the Queue can be put on hold. If a message is on hold, an icon will be displayed. Mouse over the icon to see the date the message was put on hold. Messages that are due, but are on hold, will remain in the Queue and will not be delivered until taken off hold.

Checkbox

Select the checkbox for multiple items in the Queue to make mass edits. Checked items can be put on hold, taken off hold or deleted all at once using the options located directly below the Queue's search results table.

Email Template Editor

Every email delivered by the *Modular Mailer* system is based on a template. Templates contain the email's contents, such as: who the email is from, the subject, text-only version of the message, HTML version of the message, and more. Use the *Template Editor* to manage the content of your email templates.

Email Header Options

Subject	<input type="text" value="Proper care and feeding of felines"/>		
From	<input type="text" value="Kitty Cat Corner"/>	From Name	
	<input type="text" value="from@modularmerchant.com"/>	From E-mail	
Reply-To	<input type="text" value="reply@modularmerchant.com"/>	Reply-To E-mail	
Errors-To	<input type="text" value="erros@modularmerchant.com"/>	Errors-To E-mail	

Plain Text Version of Message

☒ Include plain text version of email message.

HTML Version of Message

☒ Include HTML version of email message.

Settings & Reporting Options

Active	<input checked="" type="checkbox"/> Yes (An email using an inactive template will not be delivered.)
Track Links / Clicks	<input checked="" type="checkbox"/> Yes (Works with HTML version of messages only.)
Track message opens / reads	<input checked="" type="checkbox"/> Yes (Works with HTML version of messages only.)

Save / Update Template Options

Use these options to update an exiting template, or save the message as a new template.

☐ Do not save your changes this template.

☒ Save/update this template.

☐ Save as a new template. (The subject line will be used as the template's title.)

<< Start Over

Save & Return to Menu

Save & Send an Email >>

The sections of the *Template Editor* include:

Email Header Options

Subject

The contents of the Subject field will be used as the subject (title) of the email message. The subject may contain up to 255 characters. Selected QuickCode Tags may be used in the *Subject* field. ([See the Email QuickCode Tags section of this manual for more information on using QuickCode Tags in your email messages.](#))

From Name and Email

This will be the name and email address of the email's sender. To decrease the chances that your emails get stopped by spam filters, use an email address from your domain as the *From* address. (Example: good@MyWebsite.com vs. bad@SomeOtherWebsite.com)

Reply-To

This will be the email address used for replies and internal routing. To decrease the chances that your emails get stopped by spam filters, use an email address from your domain as the *Reply-To* address.

Errors-To

If delivery to the recipient fails, any error message returned by their email server will be delivered to this address. To decrease the chances that your emails get stopped by spam filters, use an email address from your domain as the *Errors-To* address.

Plain Text Version of the Message

Most email messages actually have two versions: a Plain Text and HTML version. Since some devices can't display HTML code, they will display the alternative Plain Text version of the email, if given the choice. To increase the chances of your email messages being received and legible, include a Plain Text version of your message whenever possible.

Include Plain Text Version of email Message Checkbox

Select this checkbox to display a text field containing the Plain Text version of your email message. If deselected, any existing Plain Text message will be deleted when the template is saved.

Plain Text Message text field

Enter the Plain Text version of the email message in this field. The Plain Text version of the email message cannot contain HTML code, images or CSS styles. (If it did, it wouldn't really be "Plain Text" anymore, would it?)



Tip: Some email applications will insert extra line breaks into long lines of text. This can result in funny-looking messages when the Plain Text email is viewed. For example:

Email software has a nasty habit of breaking up lines of text in inconvenient places. Your carefully written sentence can end up looking like this.

To avoid having extra line breaks added to the Plain Text email message when viewed by the recipient, restrict each line in the Plain Text message to a maximum of 65 characters.

HTML Version of the Message

Include Plain HTML Version of email Message Checkbox

Select this checkbox to display a text field containing the HTML version of your email message. If deselected, any existing HTML message will be deleted when the template is saved.

HTML Message text field

Enter HTML version of the email message in this field. The HTML version of the email message may contain HTML code, images or CSS styles.



Important: An unsubscribe link is required in all email messages

All Plain Text and HTML messages must contain an option for the customer to opt-out of the store's mailing list. By opting out, the customer will no longer receive any emails generated by the *Modular Mailer* module. To add an unsubscribe link to your email messages, use the {EMAIL-UNSUBSCRIBE-URL} QuickCode Tag. When the email is created, this QuickCode Tag will be translated to the URL of the unsubscribe page in your store. Here are some examples of using this QuickCode Tag:

Example of using {EMAIL-UNSUBSCRIBE-URL} in a Plain Text email message

Unsubscribe from future emails at: {EMAIL-UNSUBSCRIBE-URL}

Example of using {EMAIL-UNSUBSCRIBE-URL} in a HTML email message

Click this link to unsubscribe from future emails.

If the {EMAIL-UNSUBSCRIBE-URL} QuickCode Tag is not present in the Plain Text or HTML version of the email message, *Modular Mailer* will automatically append an unsubscribe link to the end of it when the email is delivered.

Settings & Reporting Options

Active

Email templates can be set as either Active or Inactive. Make a template inactive to prevent any email that uses that template from being sent. Any message in the *Email Delivery Queue* that uses an inactive template will be treated as if it is on hold; the message will not be delivered even if it is due, while the template is inactive.

Track Links / Clicks

Select this option to track which links in the email have been clicked on by the recipient. These results will be available in the *Reports* section of the *Modular Mailer* module's administration area. This option **will change the format** of the links in the HTML version of the email. The links will be changed to point to a tracking page in the shopping cart. The tracking page will record the click and then forward the user to the original link destination. This entire process is instantaneous and invisible to the user. **Note:** This feature only works with the HTML versions of emails.

Track Message Opens / Reads

Select this option to record the date the email was most recently opened by the recipient, if available.

These results will be available in the *Reports* section of the *Modular Mailer* module's administration area.

Note: This feature only works with HTML emails. Also, some email applications will block this feature, preventing the *Open Date* from being recorded.

Save / Update Template Options**Do not save your changes to this template**

Select this option to scrap any changes you've made to this template and continue to the either the main menu or the *Send an Email* screen.

Save/Update the template

Select this option to save any changes you've made to this template and continue to the either the main menu or the *Send an Email* screen.

Save as a new template

Select this option to save any changes you've made to this template as a new email template and continue to the either the main menu or the *Send an Email* screen.

Start Over button

Clicking this button will scrap any changes, remove all of the email template's data from memory, and return you to the *Select a Template* screen.

Save & Return to Menu button

Clicking this button will save any changes to the email template and then return you to the *Modular Mailer* module's main menu page.

Save & Send an Email button

Clicking this button will save any changes to the email template and load the *Send an Email* screen, where you can use this template to send an email to a selection of customers.

Email Series Editor

Once you've mastered email templates, you're ready to create an Email Series. A series is a group of emails that will be delivered in chronological order. Each email in the series is referred to as a "Step". Each step in the series has its own delivery date, which can be minutes, hours, days, or even weeks apart.

Edit a Series

Series Name

Fun games to play with your cat

(Series SID: 3)

Series Steps

Series Step	Email Template and Delivery Options	
1	<div>Select template: String: It's not just for packages</div> <div> <div>Delivery Date:</div> <div> <div>Weeks</div> <div>Days</div> <div>Hours</div> <div>Minutes</div> </div> <div> <div>0</div> <div>0</div> <div>0</div> <div>45</div> </div> </div> <div>The delivery date will be calculated based on the date the subscriber joins the series.</div>	<input checked="" type="checkbox"/>
2	<div>Select template: Using Squeaky rubber mice effectively</div> <div> <div>Delivery Date:</div> <div> <div>Weeks</div> <div>Days</div> <div>Hours</div> <div>Minutes</div> </div> <div> <div>0</div> <div>0</div> <div>6</div> <div>15</div> </div> </div> <div>The delivery date will be calculated based on the date the subscriber joins the series.</div>	<input type="checkbox"/>
New	<div>Select template: Select an email message template...</div> <div> <div>Delivery Date:</div> <div> <div>Weeks</div> <div>Days</div> <div>Hours</div> <div>Minutes</div> </div> <div> <div>0</div> <div>0</div> <div>0</div> <div>0</div> </div> </div> <div>The delivery date will be calculated based on the date the subscriber joins the series.</div>	<input type="checkbox"/>

Delete Selected Steps

Save Changes to this Series

The sections of the *Series Editor* include:

Series Name

The *Series Name* is only displayed in the administration area. Customers never see it. Give each Series a unique, descriptive name. The *Series Name* can contain up to 255 characters.

Series SID

System ID (SID) of the Email Series database record. This number is assigned automatically by the *Modular Mailer* software. It is used for internal tracking purposes and cannot be edited.

Series Steps

The *Series Steps* section of the *Series Editor* will list information for all the steps that the Series contains.

Series Step

Each Step will be listed in chronological order, calculated by how long after the customer has joined the series the Step's email is to be sent. *For example:* In the sample image above, the email in Step 1 will be delivered 45 minutes after the customer joins the Series. Step 2 will be delivered 6 hours and 15 minutes after the customer joins the series. If a new, third Step is added with a scheduled *Delivery Date* of 2 hours, it will be inserted between the current Steps 1 and 2 when the Series is saved. All the Series Steps will then be renumbered, based on the new chronological order.

The numbering of the Series Steps is always recalculated, based on each Step's *Delivery Date*, when changes to the Series are saved. This means that new Steps can be added to a Series after a customer has already joined the Series. If a new Step is added to a Series that comes after the customer's current Step, the new Step **will** be used. This means that changes made to a Series will be retroactively applied to customers subscribed to that Series whenever possible.

Email Template

Select the Email Template to be used for the email generated when the Series Step is triggered. The selected template will be used to construct the email message when it is delivered. This means that you can continue to make changes to the Email Template up until the instant the Step's email is generated.

Delivery Options

Select how long after the customer joins the series the Step will be triggered. All delivery dates are based on the date the customer joins the series. *Remember: Delivery dates are based on the original join date, and not based on the date the email from the previous Step was delivered.* Selecting a *Delivery Date* will display an example of when the Step would be triggered. (Not shown in sample image.)

Delete Selected Steps

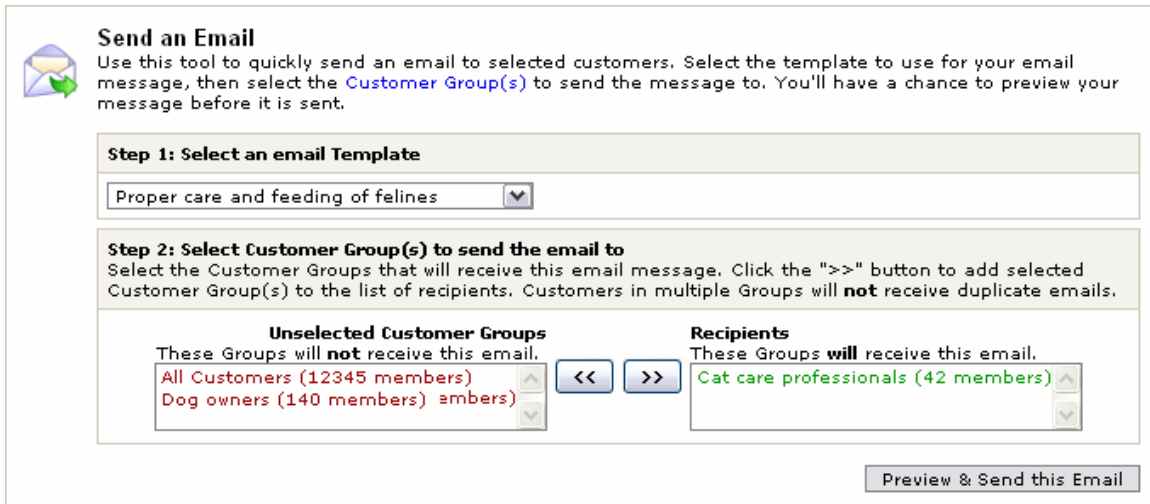
Clicking this button will delete selected Steps from the Series.

Save Changes to this Series

Clicking this button will add the newest Step to the Series (if any) and will recalculate the order of the Series Steps, based on each Step's *Delivery Date*.

Send an Email Batch

The *Modular Mailer* module's home page includes a tool to quickly send an email to a selection of customers. You will have the opportunity to review and optionally schedule the message before it is sent. This tool has two parts:



Send an Email
Use this tool to quickly send an email to selected customers. Select the template to use for your email message, then select the [Customer Group\(s\)](#) to send the message to. You'll have a chance to preview your message before it is sent.

Step 1: Select an email Template
Proper care and feeding of felines

Step 2: Select Customer Group(s) to send the email to
Select the Customer Groups that will receive this email message. Click the ">>" button to add selected Customer Group(s) to the list of recipients. Customers in multiple Groups will **not** receive duplicate emails.

Unselected Customer Groups		Recipients
These Groups will not receive this email.		These Groups will receive this email.
All Customers (12345 members)	<< >>	Cat care professionals (42 members)
Dog owners (140 members)		

Preview & Send this Email

Step 1: Select an Email Template

This menu will list all of the active Email Templates in your account. Select the desired Email Template from this menu.

Step 2: Select Customer Group(s) to send the email to

Next, select the Customer Groups to send the email to. This section of the tool will display two menus.

The menu on the left, titled *Unselected Customer Groups*, will display all of the available Customer Groups in red text. These are the Customer Groups that will **not** receive this email message.

The menu on the right, titled *Recipients*, will display all of the selected Customer Groups in green text. These are the Customer Groups that **will** receive this email message.

To add Customer Groups to the *Recipients* list, follow these steps:

1. Select one or more Customer Groups from the *Unselected Customer Groups* menu. (Hold the CTRL button to select multiple Customer Groups from this menu.)
2. Click the ">>" button to move the selected Customer Groups from the *Unselected Customer Groups* menu to the *Recipients* menu.

Use the "<<" button to move Customer Groups from the *Recipients* menu back to the *Unselected Customer Groups* menu.

Click the *Preview & Send this Email* button to review the email message that will be sent to the customers included in the Customer Groups listed in the *Recipients* menu, and then send the email.

Reports

The Reports area displays statistics about the email messages that have been sent using the *Modular Mailer* module. This includes both emails from Series and those manually sent using the Send an Email tool.



Historical Email Reports

Review statistics about the emails that have been sent to customers using the *Modular Mailer* module.

Search Email History

Find messages where

Recipient Email
▼

contains
▼

@

Go

sent between the dates

Feb
▼

05
▼

2005
▼

&

Feb
▼

05
▼

2008
▼

Search Results

304 total results returned.

SID ▼ ▲	Date Sent ▼ ▲	Recipient Name & Email ▼ ▲	Series & Series Step ▼ ▲	Email Template ▼ ▲	Date Opened	Clicks
316	2/4/08 9:18am	tester002 tester002 tester002@modularmerchant.com	None	String: It's not just for packages	None	0
311	2/4/08 9:18am	Tester McTester tester007@modularmerchant.com	None	Can your cat predict the future?	2/4/08 9:19am	1
306	2/4/08 9:18am	Tester McTester tester001@modularmerchant.com	Series SID 1 Step 1 of 5	Furballs: A Survivor's Guide	2/4/08 9:26am	2

The sections of the *Historical Email Report* include:

Search Email History

A variety of search tools are provided to help you track down the delivered emails you seek. **Tip:** To view all the emails in the history, search for *Recipient Email contains "@", added to the queue* between the dates *January 1, 2007 & December 31, 2015*. That's a quick way to find all the emails that are present in the history.

Modular Mailer Email History (Search Results area)

The historical emails that match the search criteria will be displayed here. Click one of the gray arrows below the column titles to sort by that column in either ascending or descending order. The search results will display 100 results per page. If more than 100 results are returned, links to each page will be displayed at the bottom of the Search Results (not displayed in the above image).

History SID

System ID (SID) of the Email History database record. This number is assigned automatically by the *Modular Mailer* software. It is used for internal tracking purposes and cannot be edited.

Date Sent

This displays the date and time the email message was sent to the recipient.

Recipient Name & Email

The name and email address of the email's recipient. Click the customer's name to view their *Customer Details* page. **Note:** Any "test emails" – an option available when manually sending out an email instance – in the History do not have a name associated with them, so they will list the email address only.

Series & Series Step

The System ID (SID) number of the Email Series associated with this email. (If any.) Click on the Series SID to open it in the *Series Editor*. Also displayed is the specific step of the Email Series for this email.

Email Template

Displays the name of the template used to generate this email. Click the template name to open it in the *Email Template Editor*.

Date Opened

If the "Track Message Opens/Reads" option has been selected for this Email Template, and the recipient's email program allows it, then this field will display the date and time the HTML version of the email message was most recently viewed by the recipient.


Clicks

If the "Track Links/Clicks" option has been selected for this Email Template then this field will display the number of times any links in the HTML version of the email message have been clicked on by the recipient.

Additions to the Customer Details Page

Modular Mailer adds options to the *Customer Details Page* for managing the customer's Email Series subscriptions. The *Customer Details Page* can be accessed at: [Navigation Menu > Customers > Search Customers]. On the *Search Customers* page, select a customer and click the "magnifying glass" icon. This will open the *Customer Details Page*. Locate the section of the *Customer Details Page* titled *Customer's Email Series Subscriptions*.

The *Customer's Email Series Subscriptions* section of the *Customer Details Page* includes several options:



Customer's Email Series Subscriptions

[Check All](#) | [Check None](#)

Series SID	Email Series	Series Step	Delivery Date					✓
			Month	Day	Year	Hour	Minute	
4	Cat care tips - Four part series	Step 2 of 4	Mar	11	2008	3	15	✓
2	Benefits of a regular vet checkup	Step 1 of 2	Feb	09	2008	0	0	☐
1	Curious cat fact of the week - ongoing series	Step 4 of 5	Mar	15	2008	14	0	✓

Series SID

System ID (SID) of the Email Series database record. This number is assigned automatically by the *Modular Mailer* software. It is used for internal tracking purposes and cannot be edited.

Email Series

The name of each Email Series you have created in your store will be listed here. From this list, you can review which Series the customer are subscribed to, and make changes.

Series Step

Displays the specific Step of the Email Series the customer is on. The Step displayed here will be the **next one** the customer receives. If the customer is not subscribed to the Series, then *Step 1* of the Series will be selected by default.

Delivery Date

Displays the date and time the next email message is scheduled to be delivered to the customer. If the customer is not subscribed to the Series, then today's date and time will be displayed by default.

Checkbox

If the customer is currently subscribed to an Email Series then this checkbox will be selected.

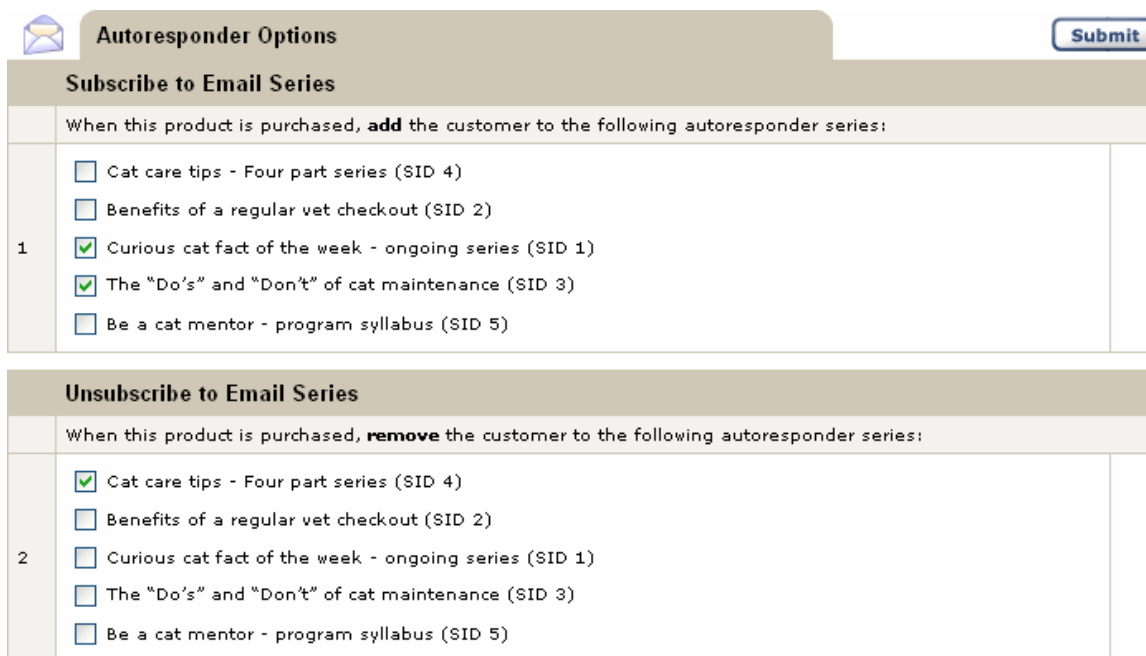
To terminate a customer's subscription to a Series, deselect the corresponding checkbox and click the *Update Email Series Subscriptions* button.


To subscribe a customer to a new Email Series, select the corresponding checkbox, set the desired date and time for delivery of the email, and click the *Update Email Series Subscriptions* button.

Additions to the Product Editor

Modular Mailer adds options to the *Product Editor* for automatically subscribing and unsubscribing a customer to an Email Series when they purchase a product. The product editor can be accessed at: [Navigation Menu > Products > Search Products]. On the *Search Products* page, select a product and click the "e" *Edit* button. This will open the *Product Editor*. There are several brown tabs along the top of the *Product Editor*. Click the tab titled *Autoresponders*.

The *Autoresponders* section of the *Product Editor* will include several options:




Autoresponder Options
Submit

Subscribe to Email Series

When this product is purchased, **add** the customer to the following autoresponder series:

1	<input type="checkbox"/> Cat care tips - Four part series (SID 4) <input type="checkbox"/> Benefits of a regular vet checkout (SID 2) <input checked="" type="checkbox"/> Curious cat fact of the week - ongoing series (SID 1) <input checked="" type="checkbox"/> The "Do's" and "Don't" of cat maintenance (SID 3) <input type="checkbox"/> Be a cat mentor - program syllabus (SID 5)
---	---

Unsubscribe to Email Series

When this product is purchased, **remove** the customer to the following autoresponder series:

2	<input checked="" type="checkbox"/> Cat care tips - Four part series (SID 4) <input type="checkbox"/> Benefits of a regular vet checkout (SID 2) <input type="checkbox"/> Curious cat fact of the week - ongoing series (SID 1) <input type="checkbox"/> The "Do's" and "Don't" of cat maintenance (SID 3) <input type="checkbox"/> Be a cat mentor - program syllabus (SID 5)
---	--

Subscribe to Email Series

This section will list all of the Email Series you've created. Select the checkbox for one or more series to subscribe the customer to them when this product is purchased. Deselect a previously selected checkbox to no longer subscribe the customer to that Series when the product is purchased.

Unsubscribe from Email Series

Below the subscribe options is another list of the Email Series you've created. This list is used to **unsubscribe** the customer from a Series they may already be subscribed to when they purchase this product. The unsubscribe function will automatically delete any Queued emails for this customer that are part of the selected Series, and will terminate the remaining Steps in that series from being triggered.



Tip: Automated unsubscriptions can be useful if the purchase of this product makes any previous Email Series the customer was subscribed to obsolete.

Tutorial: Sending your first email to a group of customers

This tutorial will walk through the process of creating a group of customers and then sending an email to them.

Step 1: Search for customers that match your criteria.

On the Search Customers page in the store's administration area, located at: [Navigation Menu > Customers > Search Customers], use either the Basic or Advanced search tools to locate a selection of customers. The customers that match your search criteria will be displayed in the Search Results section of the page.

To compile a list of customers that match different searches, or are spread out among several pages of search results, select the checkbox for the desired customers and then click the Add to list of selected customers button. Clicking this button will add the selected customers to a temporary list. After those customers have been added to the list, more searches can be performed and the customers from those searches can be appended to the list of selected customers.

Search Results

6 customers found. 250 per page.

(Search time: 0.00 seconds.)

[Check All](#) | [Check None](#)

	Name ▼ ▲	Email ▼ ▲	# of Orders ▼ ▲	SID ▼ ▲	Act. ▼ ▲						
	Jason Legweak	tester007@modularmerchant.com	1	7						12	<input type="checkbox"/>
	Dudley Heromin	tester005@modularmerchant.com	9	9						12	<input checked="" type="checkbox"/>
	Molly McTester	tester004@modularmerchant.com	0	8						12	<input type="checkbox"/>
	Susan Ovenready	tester00331@modularmerchant.com	1	6						12	<input checked="" type="checkbox"/>
	Joey Jojo Shabidoo	tester002@modularmerchant.com	13	5						12	<input checked="" type="checkbox"/>
	Tester McTester	tester001@modularmerchant.com	50	1						12	<input type="checkbox"/>

Add the checked () rows above to the list of selected customers.
(3 customers selected on 0 pages.) [Reset selected customers.](#)

Options for what to do with the 3 customers selected...

Append to the **existing** Customer Group:

Add to a **new** Customer Group named:

A

B

Step 2: Add the list of selected customers to a Customer Group.

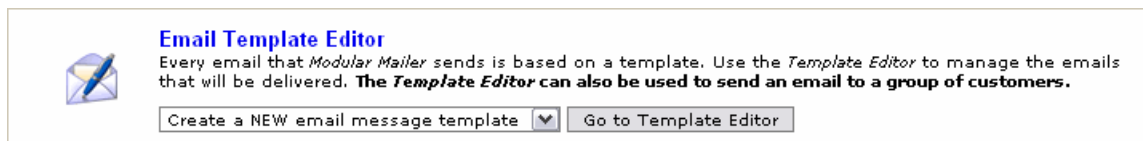
If appending the selected customers to an existing Customer Group, use the options in section **A** in the image above. Select "*Append to*" from the first menu and the name of the Customer Group from the second menu. Click the *Go* button to add the list of customers to the Customer Group. Duplicates will be ignored.

To create a new Customer Group containing the list of customers, enter the name of the new Customer Group in the text field in section **B** in the image above and click the corresponding *Go* button.

The list of customers has now been added to the Customer Group. An email can now be sent to that group.

Step 3: Create an email template.

Next, create the template that the email will use. Use the *Email Template Editor* in the *Modular Mailer* module, located in the store's administration area at: [Navigation Menu > Modules > Modular Mailer].



In the *Email Template Editor* section of the module's home page, select *Create a NEW email message template* from the menu, and click the *Go to Template Editor* button. This will load the *Template Editor* screen.

In the *Template Editor*, enter the email message's information. This includes the *From* name and email address, and email addresses to be used for returns and error reporting. There is also a section for entering the email's Subject, and a Plain Text and/or HTML versions of the email message. Tracking and reporting options can also be selected. When all of these items have been completed, click the *Save & Send an Email* button to continue to the email delivery options.

Step 4: Select the Customer Groups to send the email to.

The email delivery section of the *Template Editor* will display several things. First is a copy of the email's Subject, addresses, Plain Text and HTML messages for review. If this content is correct, continue down the page to the next section, *Select Recipients*.



This section of the tool will display two menus. The menu on the left, titled *Unselected Customer Groups*, will display all of the available Customer Groups in red text. These are the Customer Groups that will **not** receive this email message. The menu on the right, titled *Recipients*, will display all of the selected Customer Groups in green text. These are the Customer Groups that **will** receive this email message.

To add Customer Groups to the *Recipients* list, follow these steps:

1. Select one or more Customer Groups from the *Unselected Customer Groups* menu. (Hold the CTRL button to select multiple Customer Groups from this menu.)
2. Click the ">>" button to move the selected Customer Groups from the *Unselected Customer Groups* menu to the *Recipients* menu.

Use the "<<" button to move Customer Groups from the *Recipients* menu back to the *Unselected Customer Groups* menu.

Step 5: Schedule the email delivery date and send it.

Now that the email message has been written and the groups of recipients have been selected, it's time to send the message! Below the *Select Recipients* options are the delivery options.

Send a Test Email (Optional)

Send a test message to the following address:

Schedule Email Delivery

Schedule the delivery date for this message. (Use the default date & time below for **immediate delivery**.)

Month	Day	Year	Hour	Minute
February ▼	05 ▼	2009 ▼	14:00 ▼	:15 ▼

Option 1: Send a Test Email

To double-check the email message, enter an email address in the *Send a Test Email* field and click the *Send Test Email* button. A copy of the message addressed to the specified email will be added to the *Email Delivery Queue*, scheduled for immediate delivery. The test email should be generated within a matter of seconds. (Due to the nature of the Internet, it may take several minutes for the test email to arrive in your mailbox.)



Tip: The *Send a Test Email* tool can be a handy way to quickly send an email to someone, since it bypasses the need for selecting a Customer Group.

Option 2: Schedule Email Delivery

To send the email to all of the customers in the selected Customer Groups, use the *Month*, *Day*, *Year*, *Hour* and *Minute* menus to select the desired delivery date.



Tip: By default, these menus will be set to the current time when the page is loaded. Thus, it is not necessary to make any changes to these menus in order to send an email message immediately.

After the desired delivery date has been selected, click the *Save & Send an Email* button. This button will schedule an email instance in the *Email Delivery Queue* for each customer in the selected Customer Groups. Customers that are included in more than one Customer Group will **not** be added to the Queue more than once for this email instance.

Step 6: Email delivery continues automatically.

After the email instances have been added to the *Email Delivery Queue*, *Modular Mailer* will automatically start delivering the emails. The delivery software typically scans the Queue for due messages every 15 minutes, and delivers a batch of emails that are due for delivery. The number of emails delivered in each batch may vary; because servers often throttle the amount of resources given to email delivery, to keep the server running at its tip-top capacity.

Tutorial: Creating an Email Series and attaching it to a Product

Often, it can be useful to stay in contact with a customer after they have purchased a specific product. But who has the time to send a follow-up email to every customer that purchases a specific product? Not to mention remembering to send a follow-up email a certain number of **days after** the sale? And *definitely* not to mention sending a series of follow-up emails once a week starting a certain number of days after the sale?

Fortunately, *Modular Mailer* automates this entire process for you. By creating an Email Series and attaching it to a product, a scheduled ongoing series of personalized follow-up emails will be delivered to the customer automatically.

This tutorial walks through each step in the process of creating a series of email messages that will automatically be delivered to a customer over the course of several days after they purchase a certain product.

Step 1: Create the group of Email Templates that will comprise the series

The Series will automatically send email messages to the customer at future dates. Each of these emails will be built using an Email Template. Thus, the first step is to create a different Email Template for every message in the Series. Refer to the *Email Template Editor* and *Tutorial: Sending Your First Email...* sections of this manual for instructions on creating Email Templates.

Step 2: Create an Email Series

Next, create the Email Series that will generate the email messages. Use the *Email Series Editor* in the *Modular Mailer* module, located in the store's administration area at: [Navigation Menu > Modules > Modular Mailer].



In the *Email Series Editor* section of the module's home page, select *Create a NEW Email Series* from the menu, and click the *Go to Series Editor* button. This will load the *Series Editor* screen.

On the *Email Series Editor* screen, enter a name for the Series in the *Series Name* field. This name will only be displayed in your store's administration area. It will never be displayed to customers. Use a descriptive and unique name for the Series.

Create a Series

Series Name

Cat care tips - Four part series

Series Steps

Series Step	Email Template and Delivery Options	
New	<div>Select template: Proper care and feeding of felines</div> <div> <div>Delivery Date:</div> <div> <div>Weeks</div> <div>Days</div> <div>Hours</div> <div>Minutes</div> </div> <div> <div>0</div> <div>0</div> <div>0</div> <div>15</div> </div> </div> <div> <div>The delivery date will be calculated based on the date the subscriber joins the series.</div> <div>Example: If subscriber joined now, they would receive this message on Feb 5, 2008 a 4:03pm PST</div> </div>	✓

Delete Selected Steps

Save Changes to this Series

The next step is to start attaching Email Templates to the Series. Email Templates are attached one at a time in the *Series Steps* section of the editor.

When attaching the first Email Template to the Series, the *Series Step* will be displayed as "New". This will change to the number of the Series Step after it is saved.

Select the desired Email Template from the *Select Template* menu.

Use the *Weeks*, *Days*, *Hours* and *Minutes* menus to select the date this email will be delivered to the customer. The delivery date is based on the date the customer is subscribed to the Email Series. In this case, the customer will be subscribed to this Email Series when they purchase the product this Series will be attached to. Thus, if "15 Minutes" is selected as the delivery date and the customer purchased the product at 1:00pm, then this email would be delivered to them at 1:15pm.

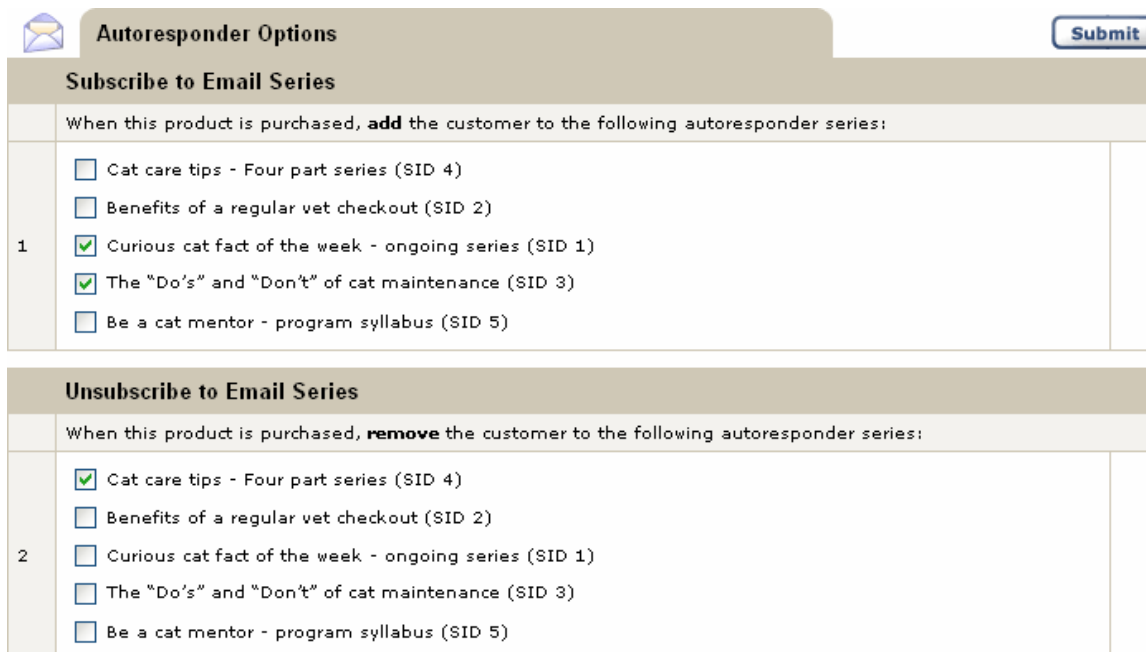
Click the *Save Changes to this Series* button to save add the new *Series Step* to the Series. The page will reload, with this Step being listed as "Step 1". Another blank "New" Step will be listed at the bottom of the page. Repeat this procedure to continue adding Steps to the Email Series.


When all of the Steps have been added to the Series and saved, it is time to attach the Email Series to a product.

Step 3: Attach the Email Series to a Product

The Email Series will be attached to the selected product in the *Product Editor* screen. The product editor can be accessed at: [Navigation Menu > Products > Search Products]. On the *Search Products* page, select a product and click the "e" *Edit* button. This will open the *Product Editor*. There are several brown tabs along the top of the *Product Editor*. Click the tab titled *Autoresponders*.

The *Autoresponders* section of the *Product Editor* will include several options:




Autoresponder Options
Submit

Subscribe to Email Series

When this product is purchased, **add** the customer to the following autoresponder series:

1	<input type="checkbox"/> Cat care tips - Four part series (SID 4)
	<input type="checkbox"/> Benefits of a regular vet checkout (SID 2)
	<input checked="" type="checkbox"/> Curious cat fact of the week - ongoing series (SID 1)
	<input checked="" type="checkbox"/> The "Do's" and "Don't" of cat maintenance (SID 3)
	<input type="checkbox"/> Be a cat mentor - program syllabus (SID 5)

Unsubscribe to Email Series

When this product is purchased, **remove** the customer to the following autoresponder series:

2	<input checked="" type="checkbox"/> Cat care tips - Four part series (SID 4)
	<input type="checkbox"/> Benefits of a regular vet checkout (SID 2)
	<input type="checkbox"/> Curious cat fact of the week - ongoing series (SID 1)
	<input type="checkbox"/> The "Do's" and "Don't" of cat maintenance (SID 3)
	<input type="checkbox"/> Be a cat mentor - program syllabus (SID 5)

In the *Subscribe to Email Series* section of the page, select the checkbox for each Email Series the customer will become subscribed to when they purchase this product. The date the customer subscribes to the Series will be the day and time of their purchase of the product. The customer will start at Step 1 of the Email Series, and any additional Email Steps in the Series will be delivered according to their individual schedules.

In the *Unsubscribe to Email Series* section of the page, select the checkbox for each Email Series the customer become unsubscribed to when they purchase this product. (If the customer is not already subscribed to the selected Series, then they will remain without a subscription to it.) *Modular Mailer* will process the unsubscribe rules **after** the subscribe rules. Therefore, if the **same** Series is selected in both the *subscribe* and *unsubscribe* sections, then the result will be that the customer will be unsubscribed from the Series.

After the changes to the product have been saved, it is now ready to start generating automated follow-up emails according to the Email Series schedule. *Let the electronic correspondence begin!*

Email Message QuickCode Tags

Following is a list of the selection of QuickCode Tags that are compatible with *Modular Mailer* email templates. These QuickCode Tags can be used in the email template's Subject, Plain Text message and HTML Message. The QuickCode Tags will be translated into the same content no matter which of these three locations they are used in. (ie: You should expect the same results in any location. HTML markup won't be added to the content a QuickCode Tag is translated into when it's used in the HTML version of the email message.)

{CUSTOMER-SID}

Will display in email messages as the System ID (SID) number of the customer's store account.

{CUSTOMER-EMAIL}

Will display in email messages as the email address associated with the customer's store account.

{CUSTOMER-PASSWORD}

Will display in email messages as the password associated with the customer's store account.

{CUSTOMER-BILL-FIRST-NAME}

Will display in email messages as the customer's first name.

{CUSTOMER-BILL-LAST-NAME}

Will display in email messages as the customer's last name.

{CUSTOMER-BILL-ADDRESS-1}

Will display in email messages as the first line of the billing address associated with the customer's store account.

{CUSTOMER-BILL-ADDRESS-2}

Will display in email messages as the second line of the customer's billing address (if any).

{CUSTOMER-BILL-CITY}

Will display in email messages as the city associated with the customer's store account.

{CUSTOMER-BILL-STATE-ISO}

Will display the two-character ISO code for the state associated with the customer's store account.

{CUSTOMER-BILL-ZIP}

Will display in email messages as the zip code associated with the customer's store account.

{CUSTOMER-BILL-COUNTRY-ISO}

Will display the two-character ISO code of the billing country associated with the customer's store account.

{CUSTOMER-PHONE-NUMBER}

Will display in email messages as the area code and phone number associated with the customer's store account.

Will be formatted as: (555) 555-5555

{CUSTOMER-ACTIVE}

If the customer's store account is active, this will QuickCode Tag will display "Yes". Otherwise, "No" will be displayed.

{CUSTOMER-CUSTOM-X}

Replace "X" with a number between 1 and 10. This QuickCode Tag will display the contents of the the corresponding Custom Field associated with the customer's store account.

{CUSTOMER-HAS-TAB}

If the customer's store account has a credit line, this will QuickCode Tag will display "Yes". Otherwise, "No" will be displayed.

{CUSTOMER-TAB-TERMS}

Will display the number of number of days in the billing cycle associated with the customer's store account (if any).

{CUSTOMER-TAB-LIMIT}

Will display the total dollar value of the customer's credit line (if any).

{CUSTOMER-TAX-EXEMPT}

If the customer's store account is tax exempt, this will QuickCode Tag will display "Yes". Otherwise, "No" will be displayed.

{CUSTOMER-CREATE-DATE}

The date the customer's store account was created. Displayed in "January 1, 2008" format.

{CUSTOMER-EDIT-DATE}

The date the customer's store account was most recently modified. Displayed in "January 1, 2008" format.

{CUSTOMER-NEWS}

Will display in email messages as the "customer news" associated with the customer's store account. (If any.) Any HTML tags present in the customer news will be removed prior to being inserted in the email Subject and the Plain Text version of the email message.

{CUSTOMER-IP}

Will display in email messages as the IP address associated with the customer's store account.

{EMAIL-UNSUBSCRIBE-URL}

Will display in email messages as the URL for the customer to unsubscribe from your store's mailing list. The URL will include a unique, encrypted unsubscribe ID number specific to that customer.

Additional Resources

For additional assistance, be sure to check the Modular Merchant forum at:

<http://forums.modularmerchant.com/>

The complete list of QuickCode Tags, including definitions & tutorials on each, is available in the QuickCode Tag online glossary at:

<http://www.modularmerchant.com/quickcode/>

Third-Party service for checking your email messages against various email services and spam filters:

<http://www.campaignmonitor.com/testing/>

Third-Party Articles on HTML Email:

<http://www.sitepoint.com/article/principles-beautiful-html-email>

<http://www.sitepoint.com/article/code-html-email-newsletters/>

http://www.campaignmonitor.com/blog/archives/2007/04/a_guide_to_css_support_in_email_2.html

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