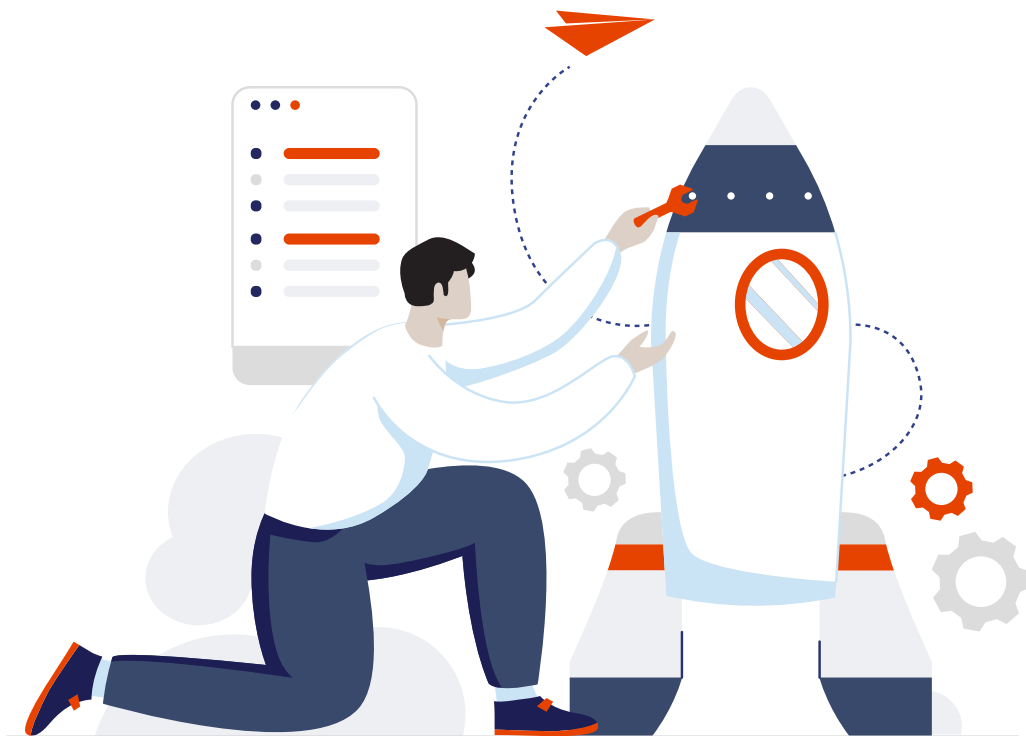




# Optional Modules



# Sending Hub

(Admin Module)

## Send eCard campaigns on behalf of company members

The sending Hub module is an advanced tool for the admin. With this module, the admin can create targeted sending campaigns on behalf of the registered users within the company. The sending Hub is fully managed by the admin and offers the flexibility to pause or resume campaigns as needed.

The process is simple: the admin can select the users to send on their behalf, upload the recipients list for each user, choose the preferred eCard design, and set the desired sending date. The eCards will then be sent to the recipients' inboxes, appearing as if they were sent from each individual user's email address.

**Create a new campaign. Step 1:** Provide a name for your campaign and select the desired sending date.

The screenshot shows the 'New Campaign' form in the 'Campaign Details' step. The form has a title 'New Campaign' and a subtitle 'Please follow the campaign setup wizard to create a new campaign.' Below this is a progress bar with three steps: '1 Campaign Details' (active), '2 Sending Users', and '3 eCard Selection'. The 'Campaign Details' section includes a subtitle 'Choose a name for your campaign and then click on "Next" button' and two input fields: 'CAMPAIGN TITLE' with the value '2022 Holidays' and 'SENDING DATE' with the value '2022-12-19 11:20'. A red 'Next >' button is located at the bottom right.

**Create a new campaign. Step 2:** Select the sending users to send on their behalf.

The screenshot shows the 'New Campaign' form in the 'Sending Users' step. The form has a title 'New Campaign' and a subtitle 'Please follow the campaign setup wizard to create a new campaign.' Below this is a progress bar with three steps: '1 Campaign Details', '2 Sending Users' (active), and '3 eCard Selection'. The 'Sending Users' section includes a subtitle 'Select a sending user form below. You can add more sending users to the campaign.' and a 'SENDER USER (EMAIL)' dropdown menu with the value 'Select value'. To the right of the dropdown is a checkbox labeled 'User Digital Signature. This will add the user's digital signature to the eCard (If applicable).' Below the checkbox is a section titled 'Upload Recipient List. Click on "Choose File" to select the recipients list, and then view the selected list to confirm. Column headlines must be [First Name, Last Name, Email] in any order. Download CSV Example'. Below this section are three buttons: 'Choose File' (red), 'View Recipients' (grey), and 'Add Another User' (green). A red 'Next >' button is located at the bottom right.

**Create a new campaign. Step 3:** Select the eCard design, enter the subject line and compose the greeting message.

### New Campaign

Please follow the campaign setup wizard to create a new campaign.

1 Campaign Details

2 Sending Users

3 eCard Selection

#### eCard Selection

Please select an eCard for your campaign

View eCard

View eCard

View eCard

View eCard

SUBJECT LINE

MESSAGE

Paragraph
B
I
[Color Picker]
A
[Align Left]
[Align Center]
[Align Right]

P

Back

Preview
Finish

**Manage Campaigns:** View the status of your campaigns.

### Campaigns

Select "Show Campaign" from the action menu to view the campaign information. Select "Clone Campaign" to resend to the same recipients a different eCard. Select "Delete" to delete the campaign.  
**Note:** Deleting a campaign will stop the sending if the campaign is still in process.

10
Search...

+ Create New Campaign

| CAMPAIGN NAME | CREATION DATE | SENDING DATE     | RECIPIENTS | STATUS      | ACTIONS  |
|---------------|---------------|------------------|------------|-------------|--|
| 2022 Holidays | 15-12-2022    | 20-12-2022 12:00 | 175        | In Progress | <div> Show Campaign Clone Campaign Delete </div> |

Showing 1 to 1 of 1 entries

1
Next

## Sending Profiles

(Admin and Selected Users Module)

### Send an eCard on behalf of an executive

The platform allows administrators to designate assistants for executives. These assistants can be assigned to multiple executives and will be able to send eCards on their behalf. When the assistant logs in, they will be presented with a list of executives they are authorized to act for, as determined by the administrator.

The assistant will have control over the executive's signature, recipient list, eCard design, and sending process, ensuring that the eCards are delivered to recipients' inboxes with the executive's email address as the sender.

**Admin.** Select the assistant from the user list, and link them to the executive's profile.

**Sending Profiles**

Please select an assistant account, and then select the sending profile. You can assign multiple sending profiles to the same assistant.

**SENDING ASSISTANT**

Select User

Search Users

UserEmail1@company.com  
UserEmail2@company.com  
UserEmail3@company.com

**EXECUTIVE SENDING PROFILES (LINKED TO)**

Sender1@domain.com Sender2@domain.com

Sender3@domain.com  
Sender4@domain.com

Save

**User.** When the assistant logs in and launches the Sending Profiles, the profiles set by the admin will be displayed.

**Sending Profiles**

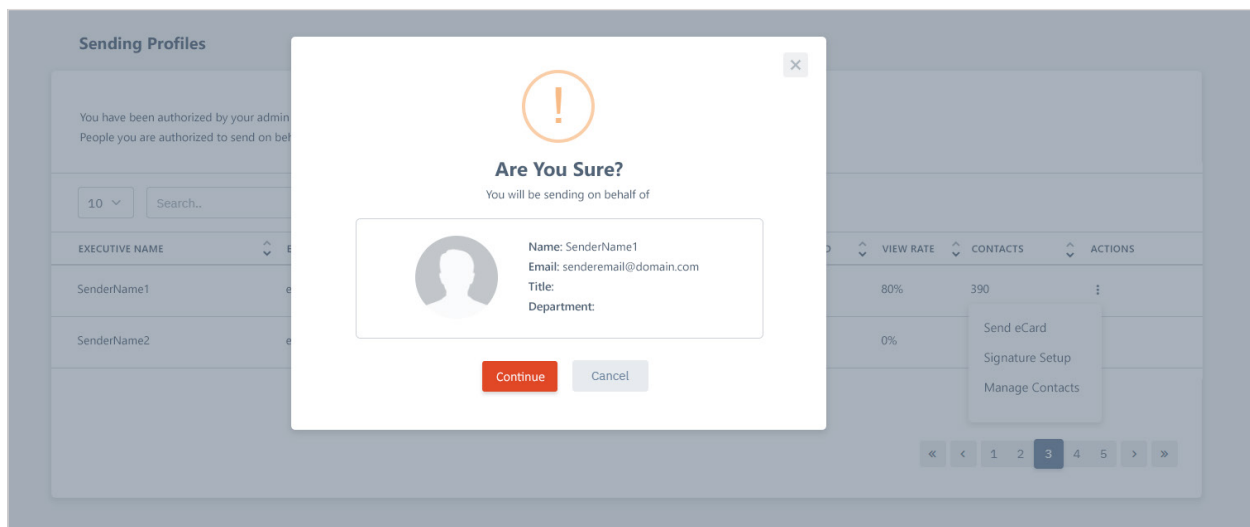
You have been authorized by your admin to send on behalf of the following users. Select from the action menu.  
People you are authorized to send on behalf: 2

10 Search..

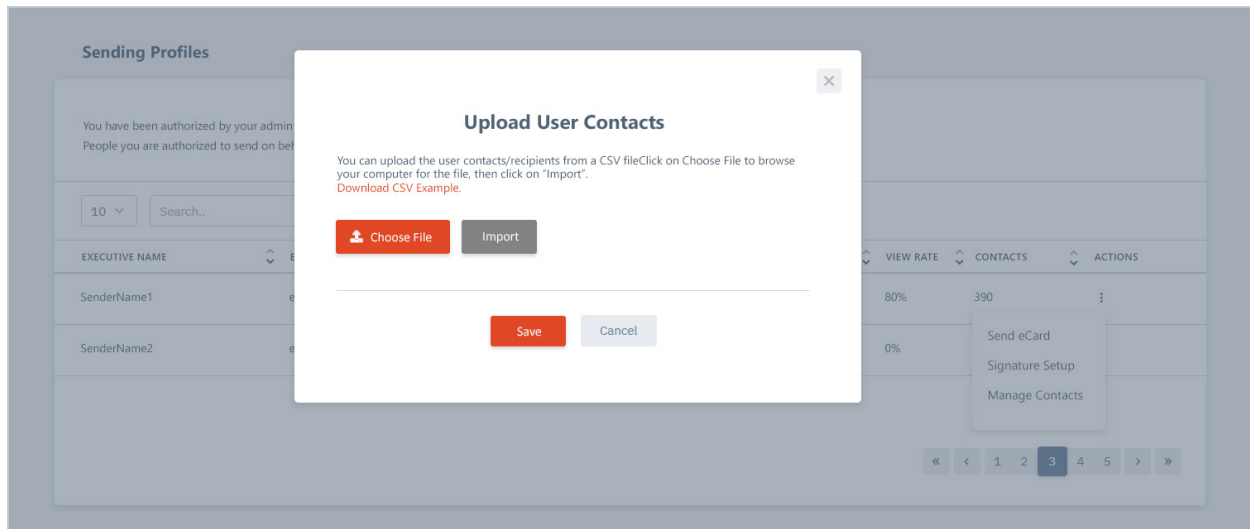
| EXECUTIVE NAME | EMAIL ADDRESS           | LAST SENT  | SENT | VIEWED | VIEW RATE | CONTACTS | ACTIONS   |
|----------------|-------------------------|------------|------|--------|-----------|----------|---|
| SenderName1    | emailadress1@domain.com | 2021-10-07 | 50   | 40     | 80%       | 390      |   |
| SenderName2    | emailadress2@domain.com | Never      | 0    | 0      | 0%        |          | <div>Send eCard<br/>Signature Setup<br/>Manage Contacts</div> |

« < 1 2 3 4 5 > »

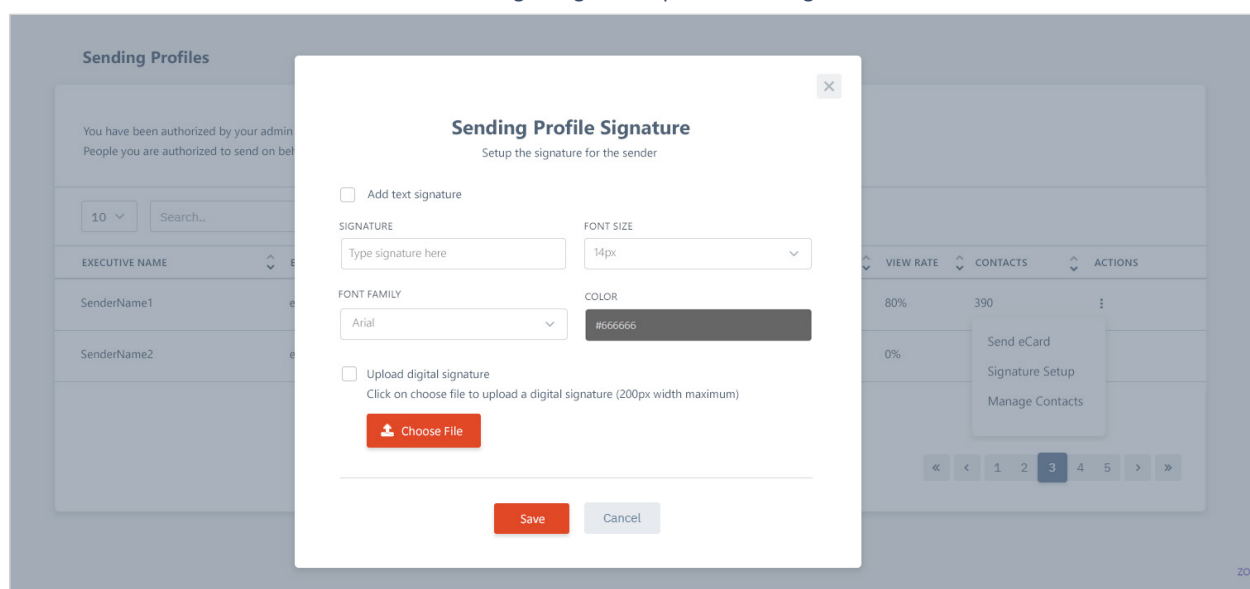
**User.** The assistant can send an eCard on behalf of the executive by selecting 'Send eCard' from the menu.



**User.** The assistant can upload contacts for the executive.



**User.** The assistant can set the executive's text and digital signatures prior to sending the eCard



# Special Occasions

(Admin Module)

## Schedule and send special automated eCards to people

The Special Occasion Module is an automated solution for sending birthday and work anniversary greetings. The administrator can upload a sheet with the necessary information, such as names, email addresses, birth dates, and work anniversary dates, and then choose the desired eCard design.

The module will automatically send the greetings on the designated dates by checking the recipient list daily. The administrator can monitor the status of each sent eCard and manage the recipient list.

**Manage campaigns page.** After creating your campaigns, this is your Special Occasions manage page.

Sent eCards  
**430**  
From all campaigns

In-Queue eCards  
**120**  
In all campaigns



Campaigns  
**2**  
Since account creation

Total Recipients  
**550**  
Total recipients in all lists

### Campaigns

Select a campaign to view details and manage recipients in the queue (If still in progress). Start a new campaign by selecting an [eCard](#).

10 ▾ Search..

| <input type="checkbox"/> | DESIGN  | CAMPAIGN NAME         | CREATION DATE | LISTS            | RECIPIENTS | SENT ECARDS | STATUS      | ACTIONS   |
|--------------------------|---|-----------------------|---------------|------------------|------------|-------------|-------------|---|
| <input type="checkbox"/> |  | Birthdays             | 2022-03-01    | March 2022       | 150        | 150         | Completed   | <div><div>View eCard</div><div>View Campaign</div><div>Delete</div></div> |
| <input type="checkbox"/> |  | Work Anniversary 2022 | 2022-01-01    | Employees Cheers | 400        | 280         | In progress |   |

Showing 1 to 2 of 2 entries

« < 1 2 3 4 5 > »

**View/Manage campaign.** The campaign page will display the sent and queued eCards, along with the status of each eCard.

Sent eCards  
**280**

In-Queue eCards  
**120**

Total Recipients  
**400**

Status  
**In-Progress**

Sending List: **Work Anniversary 2022** Type: **Work Anniversary**  
Recipients have received eCards

10 ▾ Search..

| NAME            | E-MAIL ADDRESS              | EVENT DATE  | STATUS |
|-----------------|-----------------------------|-------------|--------|
| Marc David      | marcdavid@gmail.com         | February 22 |        |
| Sarah Buldwin   | Sarah.B@company.ca          | April 17    |        |
| Dayna Hettinger | douglas65@lebsack.bizJan 10 | Aug 29      |        |

Showing 1 to 3 of 280 entries

« < 1 2 3 4 5 > »

Recipients in the queue to receive eCards ⏸ Pause All

10 ▾ Search..

| NAME            | E-MAIL ADDRESS               | EVENT DATE  | STATUS | ACTION                 |
|-----------------|------------------------------|-------------|--------|------------------------|
| Annabel Zboncak | zander.romaguera@yahoo.com   | Sep 24      |        | <div>⋮<br/>Pause</div> |
| Dell Osinski    | pansy.gleason@macejkovic.com | December 30 |        |                        |

Showing 1 to 2 of 120 entries

« < 1 2 3 4 5 > »

**Manage and create Lists.** You can view your current lists and create new ones to assign to your campaigns.

Sent eCards  
**430**  
From all campaigns

In-Queue eCards  
**120**  
In all campaigns

Campaigns  
**2**  
Since account creation

Total Recipients  
**550**  
The total recipients in the lists

**Special Occasions Lists**  
Select "Edit" from the action menu to edit the information within the list, or select and click "Delete Selected" button to delete the selected list(s).

10 ▾ Search..

| <input type="checkbox"/> | LIST NAME             | CREATION DATE | RECIPIENTS | ACTIONS                               |
|--------------------------|-----------------------|---------------|------------|---------------------------------------|
| <input type="checkbox"/> | Work Anniversary 2022 | 2022-01-01    | 400        | <div>⋮<br/>View/Edit<br/>Delete</div> |
| <input type="checkbox"/> | March 2022            | 2022-03-01    | 150        |                                       |

Showing 1 to 2 of 2 entries

« < 1 2 3 4 5 > »

**Create New List**  
Add a new special occasion list. Choose a name for your new list, and click on the "Add" button. Specify the type of the occasion.

LIST NAME

OCCASION TYPE  
☐ Birthday  
☐ Work Anniversary

Add List

ZONE1 - OPTIONAL MODULES

**Edit Lists.** You can import recipients into your list, manage recipients, and edit the list name.

Sent eCards  
**430**  
From all campaigns

In-Queue eCards  
**120**  
In all campaigns

Campaigns  
**2**  
Since account creation

Total Recipients  
**550**  
Total recipients in all lists

### Edit List

Update list name and click on the "Update" button.

LIST NAME

OCCASION TYPE ☒ Birthday ☐ Work Anniversary

Update

### Import Contacts

Import a complete contact list to "March 2022" list from a CSV file. The imported contacts will be automatically added to your main contacts. Duplicated contacts will be ignored. Click on "Import Contacts" to start the process. [Download CSV Example](#).

Import Contacts

### March 2022

Creation Date: 2022-03-01

Contacts in March 2022 list

10

| <input type="checkbox"/> | NAME              | EMAIL                      | ACTIONS                 |
|--------------------------|-------------------|----------------------------|-------------------------|
| <input type="checkbox"/> | Zsazsa McCleverty | zmcclervtye@soundcloud.com | <button>Remove</button> |
| <input type="checkbox"/> | Yoko Pottie       | ypottiec@privacy.gov.au    | <button>Remove</button> |
| <input type="checkbox"/> | Wesley Burland    | wburlandj@uiuc.edu         | <button>Remove</button> |

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### Select contacts to add to March 2022 list

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| <input type="checkbox"/> | NAME                | EMAIL                        | ACTIONS              |
|--------------------------|---------------------|------------------------------|----------------------|
| <input type="checkbox"/> | Travus Bruntjen     | tbruntjeni@siteimeter.com    | <button>Add</button> |
| <input type="checkbox"/> | Stu Delamaïne       | sdelamaïne@who.int           | <button>Add</button> |
| <input type="checkbox"/> | Saunder Offner      | sofner19@mac.com             | <button>Add</button> |
| <input type="checkbox"/> | Stephen MacGilfoyle | smacgilfoyley@bigcartel.com  | <button>Add</button> |
| <input type="checkbox"/> | Skip Hebblethwaite  | shebblethwaite10@arizona.edu | <button>Add</button> |

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**Manage Recipients.** You can import recipients into the main contacts list and assign them to different sending lists.

Sent eCards  
**430**  
From all campaigns

In-Queue eCards  
**120**  
In all campaigns

Campaigns  
**2**  
Since account creation

Total Recipients  
**550**  
The total recipients in the list

### Manage Recipients

Select "Edit" to edit contact's information, or select "Delete Selected" to delete the selected recipients from the main contacts list.

10

Import recipientsAdd Recipient

| <input type="checkbox"/> | NAME            | E-MAIL                       | BIRTHDAY | WORK ANNIVERSARY | LIST       | ACTIONS  |
|--------------------------|-----------------|------------------------------|----------|------------------|------------|--|
| <input type="checkbox"/> | Dayna Hettinger | douglas65@lebsack.biz        | Jan 10   | Aug 29           | March 2022 | <div><div>View/Edit</div><div>Delete</div></div> |
| <input type="checkbox"/> | Annabel Zboncak | zander.romaguera@yahoo.com   | Sep 24   | Nov 15           | March 20   |  |
| <input type="checkbox"/> | Dell Osinski    | pansy.gleason@macejkovic.com | May 30   | Oct 17           | Employees  |  |

Showing 1 to 3 of 500 entries

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 ZONE1 - OPTIONAL MODULES



**Special Occasion eCards.** After setting up your lists and adding recipients, select an eCard to begin the campaign.

Sent eCards  
**430**  
From all campaigns


In-Queue eCards  
**120**  
In all campaigns

Campaigns  
**2**  
Since account creation


Total Recipients  
**550**  
The total recipients in the list

### Special Occasions eCards


Please select an eCard from the selection below to view and customize.




Anniversary 2022  
WORK ANNIVERSARY ECARD



Birthdays 2022  
BIRTHDAY ECARD



Anniversary 2021  
WORK ANNIVERSARY ECARD



HAPPY BIRTHDAY  
Birthdays 2021  
BIRTHDAY ECARD

**Customize and finish.** Select the sending lists, add a subject line, and customize your message.

### eCard Customization

OCASION LISTS  
(Select a special occasion list)

Select list

SUBJECT  
(Enter a subject line for your message)

Subject line

YOUR MESSAGE

Sans Serif Normal B I U G A X<sub>2</sub> X<sup>2</sup> H<sub>1</sub> H<sub>2</sub> ” ”

Your message

DISPLAY OPTIONS

☐ Display my signature

☐ Display my digital signature.

☐ Notify me when the eCard is viewed

Reset

Preview

Submit



COMPANY  
LOGO