**Email Marketing**

**Quick Start Guide**

|  |
| --- |
| **Email Marketing enables organizations to instantly communicate via email with all constituents or specifically targeted groups. With customizable targeting capabilities, extensive formatting options, a scheduler, and robust reporting, Email Marketing is a comprehensive, cost-effective and easy-to-use email communication platform.** |

|  |
| --- |
| **Creating and sending an email message will include some or all of the following steps:** |

**Create and Manage Lists**: Choose an existing Mailing List or Create a new list   
**Create and Manage Content:**  Choose to use existing content or create new content

**Address & Assemble:**  Join together the appropriate mailing list and content and assign an Email Name  
**Send & Schedule:**  Schedule the Email for broadcast

**Reports:**  Review outcomes of the broadcast

***Lists and Content can be joined in the Address & Assemble step at any time for you to Send & Schedule immediately or for a later date.***

|  |
| --- |
| **Begin here: Logon to Administration Center** |

1. Log on to your Administration Center.
2. You will be prompted to log in using your User-ID and Password. For security purposes, three failed attempts to log in will lock your account for up to 2 hours.
3. The screen will refresh with the Administration Center landing page.
4. Choose Email Marketing button on the top vertical navigation, then choose the appropriate dropdown option.

|  |
| --- |
| **Step 1: Create and Manage Lists** |

**Click on Create and Manage Lists tab at top of page**

**There are three ways to create a mailing list:**

1. Search the database using a query.
2. Provide a list of unique ID numbers to specify the mailing list.
3. Combine existing lists.

\*Some organizations will also have the capability to upload email addresses.

**To query the database:**

1. Click on Create & Manage Lists tab at top of page.
2. Click on Create a Recipient List button.
3. Name your List.
4. Choose your Search Criteria by clicking on the Expand icon (+) beside each data table to display available fields.
5. Use Select All table to select the entire database.
6. Use Common Search table when appropriate for your search.
7. Use Standard Query Builder to create simple lists, i.e. Class of 1999 working in NYC.
8. Use Advanced Query Builder to create lists using complex criteria, i.e. Class of 1999 working in NYC or Atlanta, whose occupational field is accounting.
9. Save your List.
10. The page will refresh and your list will appear at the top of the returned page.
11. Optional: Click on Calculate to determine the number of records in your list; the count on this page represents all records that met the search criteria; it does not remove deceased, opt-outs or blank emails (that will be completed in Address & Assemble tab).
12. Optional: Click on Display to display the records in your list.

**To search for a list of unique IDs:**

1. Create a file with one unique ID per line (also known as the Client ID).
2. Save the file as a tab-delimited text file. (Notepad is a good tool to create this list.)
3. Click on Upload a Recipient List button.

**To combine existing lists:**

1. Click on Combine Recipient Lists button.
2. Follow on-screen instruction to add, subtract, or take the intersection of various lists.

**Useful information about Lists:**

* Lists created using a query are dynamic, meaning the list is refreshed prior to the launch of the email to guarantee the most up-to-date data.
* Lists cannot be deleted once they are associated with an email that has been sent. This is to ensure availability of historical data for Reports.
* Use meaningful naming conventions to identify lists for future reference.

**Important notes about Test Lists**:

* Any list can be flagged as a test list by checking the box “Mark this list as a test list” beside the List name input field at top of page. The list will then appear with test after the name i.e. “Class of 1999 (test)”.
* **\*\*IMPORTANT\*\* (Test) lists should be used to verify content formatting and data tags prior to sending to a mailing list. They should never be sent to a large group.**
* Consider creating a small (test) list that includes different email providers (AOL, Gmail, Verizon, etc.) as well as staff members willing to review the content prior to a full broadcast.
* (Test) lists are accessed within the Address & Assemble step after clicking on “Send test email” link. Also available is the option to send only to the admin’s email address as displayed. (Me – name@harrisuniversity.edu)
* \*\*TEST\*\*\* will appear in the subject line of test emails to differentiate them from other emails.
* No report will appear in Reports tab for test emails.

|  |
| --- |
| **Step 2. Create and Manage Content** |

**Click on Create and Manage Content tab at top of page.**

**There are three ways to create content**:

1. Create HTML content version using WYSIWYG and copy to Text content version.
2. Create Text content version only.
3. Upload an HTML file, a text file or both

**To create new HTML version content**

1. Click on Create Content button at top of page.
2. Name your Content.
3. Note the two tabs at top of page: HTML version and Text version. The default display is the HTML content version.
4. In HTML editor page enter your content between the two solid lines using WYSIWYG editor (similar to the MS Word editor).
5. Click on Work with Data Tags button to insert html Data Tags to personalize email (refer to Email Marketing for Staff and Volunteers manual for full instruction on using data tags).
6. Click on Open File Manager button to upload or insert images or document links into the content.
7. Click on Preview HTML button often to check your work.

**To create new Text version content**

1. Click on Text version tab at top of page.
2. In Text editor page you **must** also enter content or the email will not launch.
3. Click on Work with Data Tags button to insert text Data Tags to personalize email (please refer to Email Marketing for Staff and Volunteers manual for full instruction on using data tags).
4. Click on Open File Manager button to insert links for images or documents into the content.
5. Click on Preview Text button often to check your work.

|  |
| --- |
| **IMPORTANT: Every email must include a text version but may also include an HTML version. Click the Save Content button at bottom of Text content page to save both HTML and Text content versions.** |

**Templates**

Templates are designated by checking the box “Mark as a Template” beside the “Name this Content” box at top of page for either HTML or Text content versions. They will display with the “(template)” designation. Templates are created to be used as boilerplates. Changes cannot be made directly to Templates. Templates must be “duplicated” and renamed before any edits can be made. This maintains the integrity of the boilerplate for future uses. To save time, use templates as a basis for content you send frequently or on a regular basis.

* Make a copy of the template you wish to use by clicking on the Duplicate link to the right of the appropriate template.
* Rename the template, but DO NOT mark as Template. Edit then Save.

**Important Notes about Content:**

* **Do not delete the Removal link (unsubscribe link). This is required for mailing.**
* **Remember that content is always required on the Text content page.**

**Useful information about Content:**

* It is a good practice to always test your content prior to sending to a mailing list using Send Test Email link in Address & Assemble Email step.
* Content for Text version can be keyed in directly OR it can be copied from the HTML version using the Copy HTML To Text Version button; resulting text may need editing for clarity.
* Content cannot be deleted once it has been associated with an email that has been sent. This is to ensure availability of historical data for Reports.
* Use meaningful naming conventions to identify content for future reference.

|  |
| --- |
| **Step 3. Address & Assemble Email** |

**Click on Address & Assemble Email tab at top of page.**

1. Click on Address and Assemble a New Email button.
2. Assign a Name to your email.
3. Enter all required information on page.
4. Click Save This Email button.
5. The screen will refresh with your email listed at the top.
6. Click on Send Test Email to send a copy of the email to yourself or a (test list) a copy of the email.
7. Choose Check Spam Rating for a determination on the likelihood of the email being flagged as spam.
8. Click on Calculate to see the number of emails that will be sent (this number will remove opt-outs and records with no email address or flagged as deceased).
9. Click on Display to see the names of the recipients.

NOTE: Email recipients listed in the blind copy (bcc) line will see the content of the email but not any personalization resulting from any data tags. These emails will contain \*\*\*SAMPLE\*\*\* in the subject line to differentiate them from other email.

|  |
| --- |
| **Step 4. Send & Schedule** |

**Click on Send & Schedule tab at top of page**.

1. Calendar View will display by default. Click on List View for an alternate chronological listing of emails sent or scheduled.
2. To send immediately:
   1. Click on Send a Broadcast Email Right Now button.
   2. Complete Steps 1-3 that appear in the popup box.
   3. Locate the Email on the calendar and click APPROVE.
3. To schedule for a later date:
   1. Select the date on the calendar.
   2. Select the time on the hourly list on the returned page.
   3. Complete Steps 1-3 that appear in the popup box.
   4. Locate the Email on the calendar and click APPROVE.

Once your email appears on the calendar you must click the Approve link at the bottom of the text. To review information about the email or view the content click on the name of the email.

**\*\*\*\*\*IMPORTANT NOTE: All Emails MUST BE APPROVED before they will launch\*\*\*\*\***

|  |
| --- |
| **Step 5. Reports** |

Once the email has been broadcast to all recipients the email address associated with the logon used to create the email (usually the admin) will receive two items:

* Job Status report: details of the broadcast once it has completed.
* Email with \*\*\*SAMPLE\*\*\* on subject line; this is a copy of the email content that was sent.

To review outcomes of the broadcast:

* 1. **C**lick on the Reports tab at top of page.
  2. Click on the View Summary link for your Email.
  3. The following types of data will be available to you:
     + Start and Stop times
     + Administrative details
     + Links to view the html and text versions of the email
     + Recipient details (total sent, open count)
     + Recipient errors (bounce-backs, other sending problems)
     + Link tracking (count and listing of recipients who clicked on links included in the EMAIL)

For detailed information on Reporting features please refer to the Email Marketing for Staff and Volunteers manual.