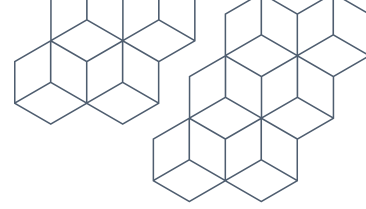


Adestra Basics Training Handbook



Familiarize yourself with the definitions in this handbook and then walk through the exercises outlined to understand the fundamentals of working with your data in Adestra, how to put together an email campaign, and finally reporting.



Section 1: Data & Lists

Helpful definitions

Data:

Data relates to the information you sync or import on a member.

Core Table:

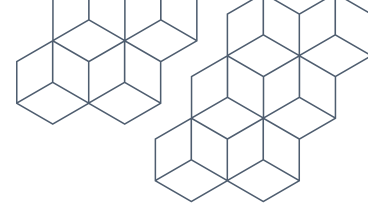
Contains all your unique records and attributes for every contact. Note: Unique identifiers tend to default to email addresses, or are otherwise designated as the person ID as dictated by the AMS.

Standard Static List

A basic list of contacts for a specific send or as a source for an automation program. You can also add and remove contacts one-off at any time.

Dynamic List

Dynamic lists automatically update at a scheduled time and/or upon launch based on list criteria.



Exercise 1: Upload a standard list

Step 1: Save your excel document as a CSV file

Step 2: Go to the Data tab in your workspace then choose to “Create new list”. Give your list a name. You can choose to tag your list for easier searching later. Finally, choose your core table.

Step 3: Click save

Step 4: Click the import tab

Step 5: Choose to select the file to upload (either from your desktop or file manager)

Step 6: Be sure to keep delimiter and character encoding set as Auto Detect

Step 7: Choose your data source

Step 8: Click Next

Step 9: Import Mapping: Fields shown on the left are fields from your CSV file (Adestra will match field(s) from your csv file to the matching field(s) on the right from your Core table).

Drag and drop any highlighted white fields to the corresponding field(s) on the right.

Step 10: Click Import

upland Adestra

Home > HighRoad Solution Demo and Training Workspace > Data > Lists > Training Test > Import

Import mapping

< Back to lists

Overview Browse **Import** Import Log Launches Settings Reports Associated Campaigns Associated Programs

Selected CSV Tony_Test_-_Sheet1.csv

Dedupe method Overwrite duplicate records

Dedupe field email

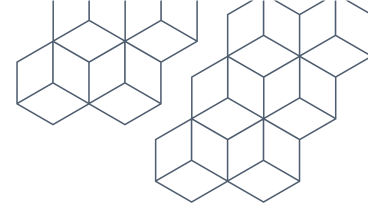
Import Map

Drag and drop your CSV's fields to your table's fields to define how your data should be imported. CSV fields with names matching your table have been automatically mapped for you.

CSV fields		Core table fields
email	→	email (required)
id	→	first_name
link		last_name
		company_name
		ams_id
		expiration_date
		join_date
		address
		address_2
		city
		state
		zip_code
		birthdate
		interest
		type
		age
		is_cae
		job_function
		job_title
		country_code
		frequency_suppression

Drag

Add data table Guess matching fields



Exercise 2: Create a dynamic list

Step 1: Choose to “Create a new dynamic list”.

Step 2: Give your list a name.

Step 3: You can choose to tag your list for easier searching later.

Step 4: Select your core table

Step 5: Updating: Choose between ‘Scheduled updates’ and ‘Automatic updates’

Step 6: Navigate down to the bottom of the page and click save (your page will refresh, and you will be taken to the overview page)

Step 7: Include Lists. Select your included list(s).

Step 8: Exclude Lists. Select your excluded list(s).

upland Adestra

> HighRoad Solution Demo and Training Workspace > Data > Lists > Basic Training - Data

Basic Training - Data

< [Back to lists](#)

[Overview](#) [Browse](#) [Import Log](#) [Launches](#) [Settings](#) [Reports](#) [Associated Campaigns](#) [Associated Programs](#)

ID	239363
Name	Basic Training - Data
Table	HighRoad Trial Account Core Table
Record history	No
Owner	Emily Wilson
Workspace	HighRoad Solution Demo and Training Workspace
Created	26 seconds ago
List size	0 Update
List type	Dynamic
Scheduled update time	No schedule update
Automatic update	Yes
Include all core table contacts	No

Include Lists

[Add Include Lists](#)

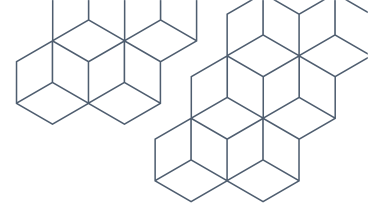
Exclude Lists

[Add Exclude Lists](#)

Filters

[Add Filters](#)





Section 2: Email & Configuration

Helpful definitions

Workspace

Your association's account

Project

Projects contain all your association's campaigns and where campaigns are created

Campaign

Campaigns are your marketing emails that are sent to members

Content

'Remote XML' allows you to pull in remote content into a campaign. (i.e. blog content)

Web Analytics

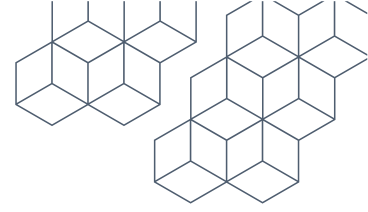
If you are using Google analytics and would like to know more please reach out to your Account Executive.

Frequency Profile

This is an on-demand feature, and if you think this is something you and your team will need contact your Account Executive.

A/B Split Testing

A/B split tests can be as simple as a subject line A/B split, different times or more complex testing of the email content itself. You can see which variant achieves the best results, and the most successful will launch automatically to the rest of your list. You will be able to see the individual results for each variant in the split test report, so you can easily compare and analyze your results, as well as a full report for the campaign.



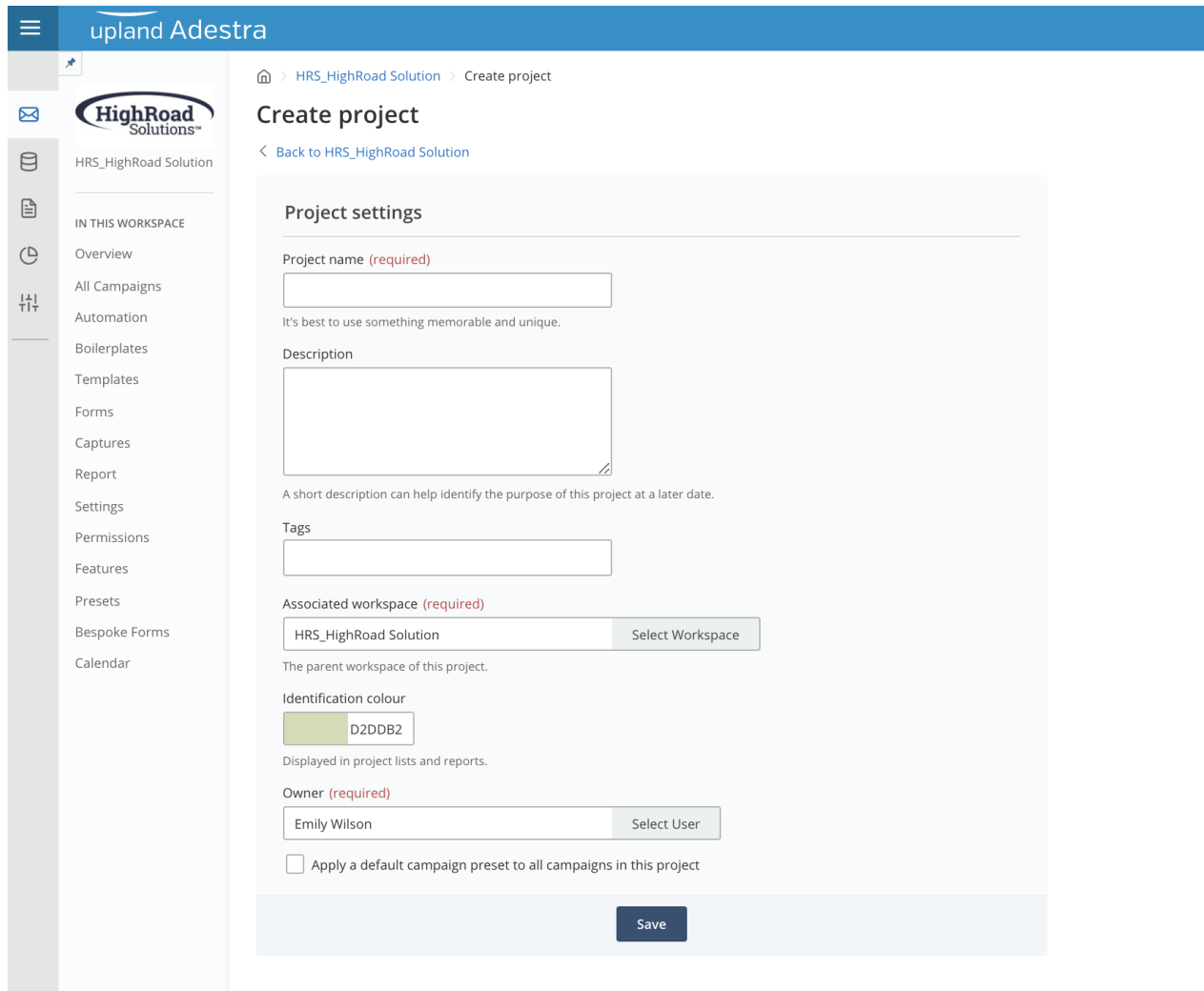
Exercise 1: Create a project

Step 1: Navigate to Create new project on the right-hand side navigation bar

Step 2: Give your project a name using the following naming convention (your Initials – Assoc. Acronym | Training | Test Project).

Step 3: Provide a tag for your project if you are using tags;

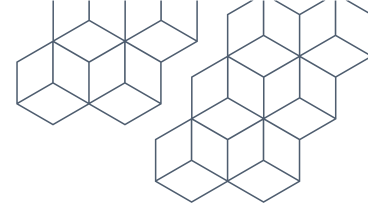
Step 4: Scroll down to the bottom of the page and click save.



The screenshot shows the 'Create project' form in the upland Adestra interface. The form is titled 'Create project' and is located within the 'HRS_HighRoad Solution' workspace. The form includes the following sections:

- Project settings**
 - Project name (required)**: A text input field with a placeholder. Below it, a note states: "It's best to use something memorable and unique."
 - Description**: A large text area for a short description. Below it, a note states: "A short description can help identify the purpose of this project at a later date."
 - Tags**: A text input field.
 - Associated workspace (required)**: A dropdown menu showing 'HRS_HighRoad Solution' and a 'Select Workspace' button. Below it, a note states: "The parent workspace of this project."
 - Identification colour**: A color picker showing 'D2DDB2'. Below it, a note states: "Displayed in project lists and reports."
 - Owner (required)**: A dropdown menu showing 'Emily Wilson' and a 'Select User' button.
 - ☐ Apply a default campaign preset to all campaigns in this project

A 'Save' button is located at the bottom right of the form.



Exercise 2: Building a campaign

Part 1: Campaign Settings

Step 1: Campaign name (required) (Your Initials – Assoc. Acronym | Training | Test Campaign)

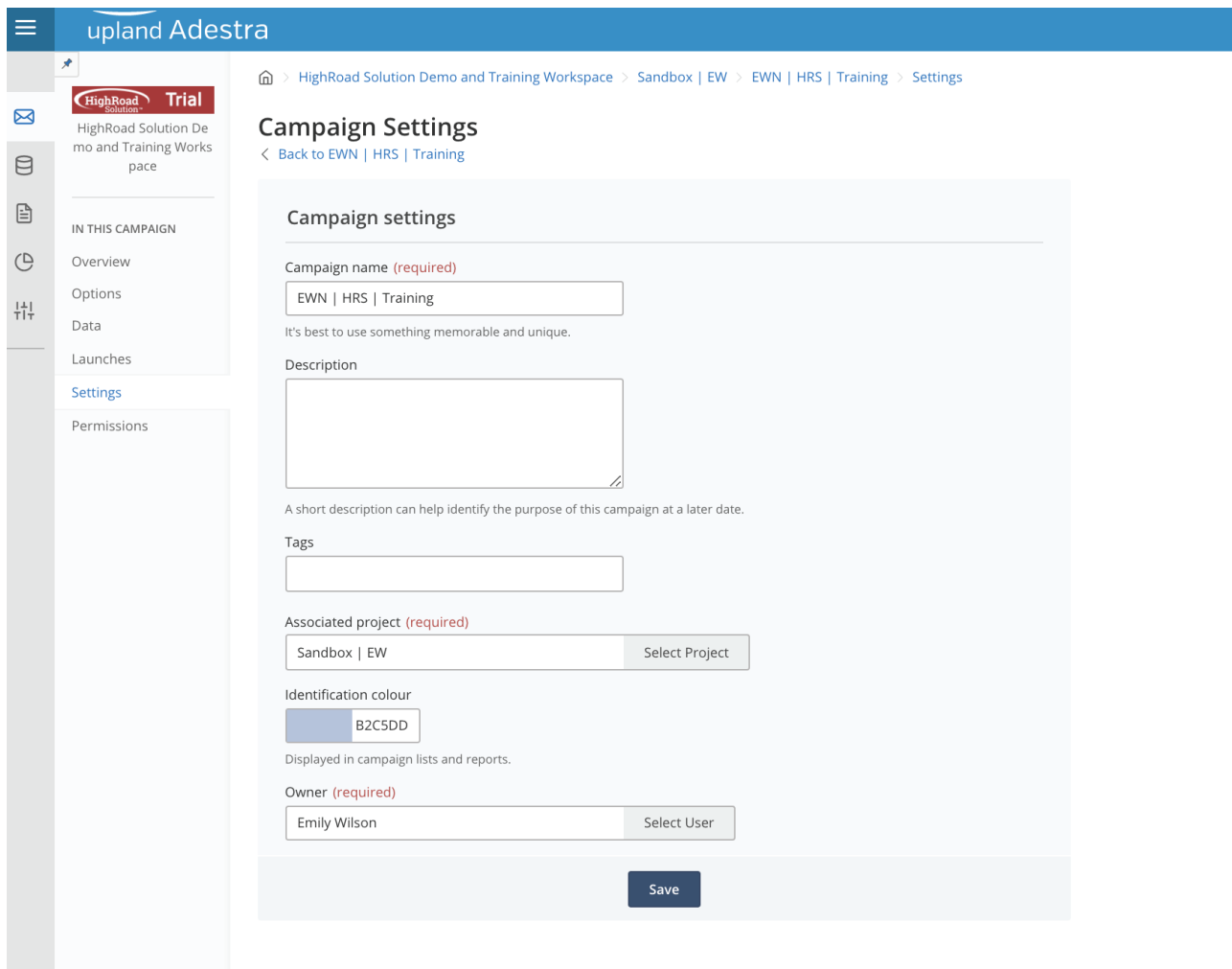
Step 2: Description (not required)

Step 3: Tags (not required)

Step 4: Owner (required)

Step 5: Apply campaign preset

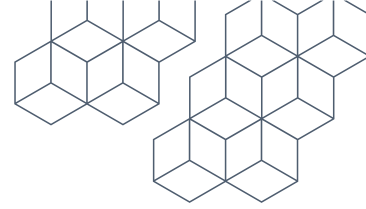
Step 6: Click save



The screenshot shows the 'Campaign Settings' page in the Upland Adestra interface. The page is divided into a left sidebar and a main content area. The sidebar contains a 'HighRoad Solution Demo and Training Workspace' header, a 'Trial' badge, and a list of options: Overview, Options, Data, Launches, Settings (highlighted), and Permissions. The main content area has a breadcrumb trail: Home > HighRoad Solution Demo and Training Workspace > Sandbox | EW > EWN | HRS | Training > Settings. Below the breadcrumb is a 'Back to EWN | HRS | Training' link. The 'Campaign settings' section includes the following fields:

- Campaign name (required):** A text input field containing 'EWN | HRS | Training'. Below it is a note: 'It's best to use something memorable and unique.'
- Description:** A large text area for a description. Below it is a note: 'A short description can help identify the purpose of this campaign at a later date.'
- Tags:** A text input field for tags.
- Associated project (required):** A dropdown menu showing 'Sandbox | EW' and a 'Select Project' button.
- Identification colour:** A color selection box showing 'B2C5DD'. Below it is a note: 'Displayed in campaign lists and reports.'
- Owner (required):** A dropdown menu showing 'Emily Wilson' and a 'Select User' button.

A 'Save' button is located at the bottom right of the form.



Part 2: Campaign Options

Step 1: Subject line (required)

Step 2: Domain (required)

Step 3: From name (required)

Step 4: Reply Address

- a. Check box to send replies to a custom mailbox
- b. Provide a reply name
- c. Provide a reply address

Step 5: Unsubscribe handling (if you have a custom EPC, no need to select an option)

- a. Insert unsubscribe link into text parts
- b. Insert unsubscribe link into the html parts
- c. Unsubscribe page URL

Step 6: Select your unsubscribe list

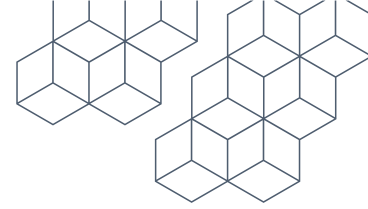
- a. Opt-out : Global unsubscribes (used to collect inbound unsubscribes)

Step 7: Navigate to select list on the right side

The screenshot shows the 'Campaign Options' form in the Upland Adestra interface. Red arrows point from a central point to the following fields:

- Subject line (required):** A text input field with the placeholder 'Subject Line Here' and a 'Personalise' button.
- Domain (required):** A dropdown menu showing 'hrtrial.msgfocus.com'.
- From address:** A section containing:
 - From name (required):** A text input field with 'HighRoad Solutions Client Care'.
 - From email address (required):** A text input field with 'support@highroadsolution.com'.
- Reply address:** A section containing:
 - Reply name (required):** A text input field with 'HighRoad Solutions Client Care Team'.
 - Reply address (required):** A text input field with 'support@highroadsolution.com'.
- Unsubscribe handling:** A section containing:
 - Two checkboxes: 'Insert unsubscribe link into text parts' and 'Insert unsubscribe link into HTML parts'.
 - Unsubscribe page URL:** A text input field.
 - Unsubscribers should be added to this list:** A dropdown menu with '- Choose -'.

Below the 'Unsubscribe handling' section, there is a note: 'Contacts already in this list will also be suppressed from the launch.' and a section titled 'Other unsubscribe lists suppressed at launch' with a note: 'The unsubscribe list chosen above will be suppressed whether selected here or not.' This section contains two checkboxes: 'Opt Out: Global Unsubscribes' and 'Transactional'.



Part 3: Create HTML content

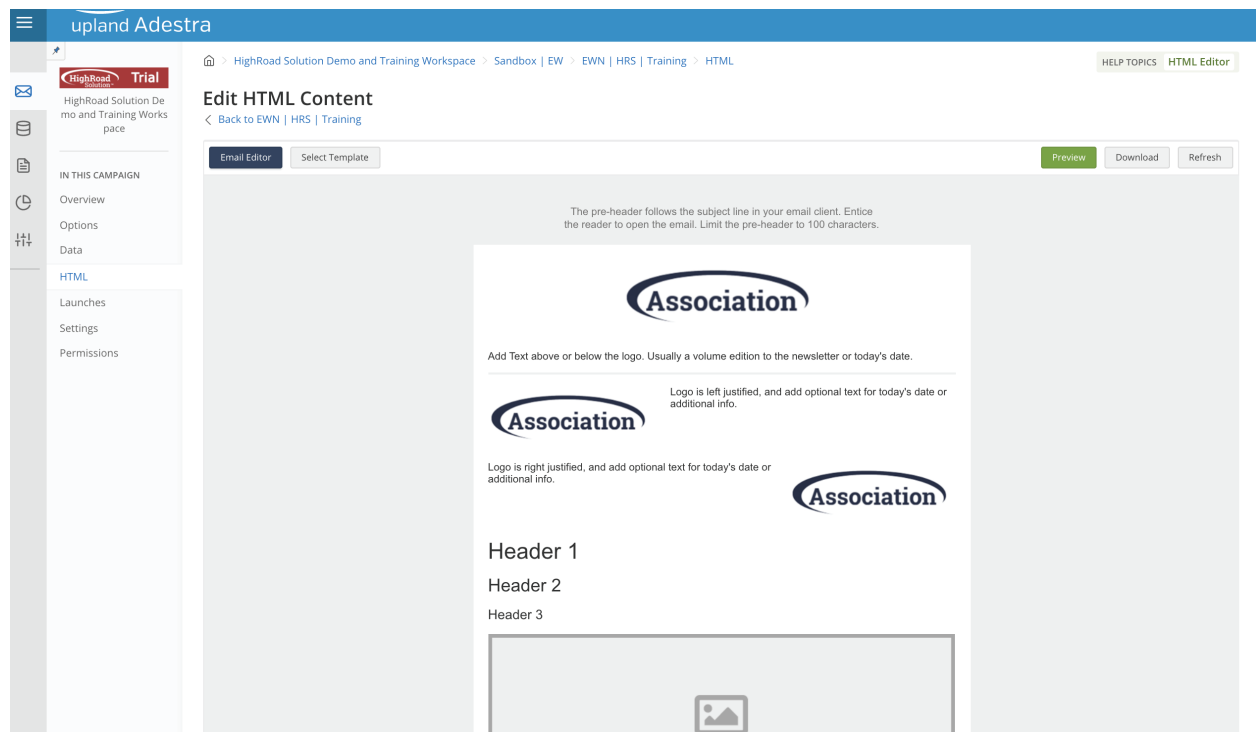
Step 1: Click the 'create HTML content' button

Step 2: Edit HTML Content

- a. Click “Select Template” in the top left area to pull up your template library that will show a thumbnail of your available templates and/or your one Master Template.
- b. Click ok

Step 3: Choose Email Editor. In the email editor window you will see a sparse view of your master template. You will need to build out your campaign to your needs. There are three template components;

- a. Images: Working with images in your template is as easy as clicking into that component and pulling up your file manager.
- b. Article Titles & Article body copy: Next, you will have text areas that you can type and fill in with your copy. Here it is a typical WYSIWYG editor where you have the typical functions of a word document editor. (It is not recommended to copy and paste from a word document as this brings over extraneous code that could break an email template. Instead, it is recommended that you paste copy from a word document into a text editor first and then paste into the email editor in Adestra.)
- c. Call-To-Action Button: You can modify the placement of the CTA from Left, to center, to right, and finally to hide it all together.





Exercise 3: Testing & Launching

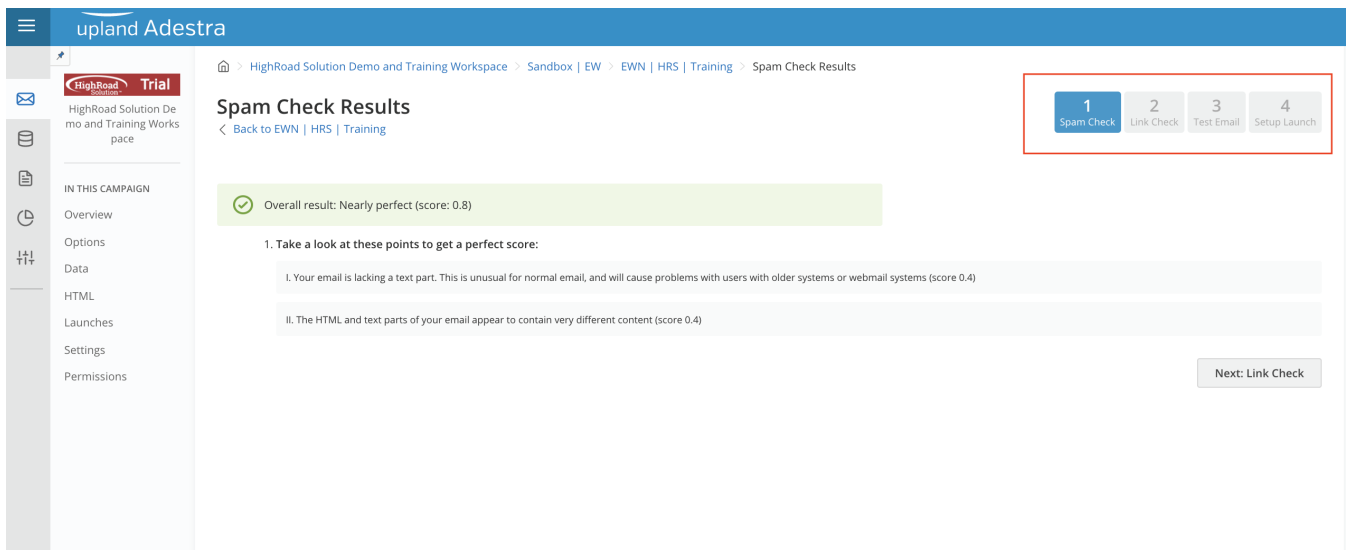
Step 1: Spam check. Here you will get an itemized list of potential red flags that are being picked up in your email that potentially could be picked up by spam filters.

Step 2: Checking links in your email. Anything with a green checkmark is good to go. Anything with an exclamation means the link is either slow to load or is broken. (Note: Many instances the social sites will be picked up with an exclamation, but the links are good.)

Step 3: Sending test this step you can choose to send just yourself a test, choose from the drop down to send to a group of emails to test, or send to another user entirely.

Step 4: Launch. Launching your campaign is the last step in your process. There are two options for launch.

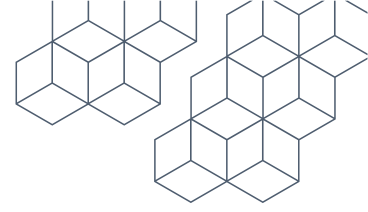
- Now which will launch your campaign immediately
- You can also choose to send automatically to non-openers



The screenshot shows the Upland Adestra interface. The top navigation bar is blue with the 'upland Adestra' logo. Below it, a breadcrumb trail reads: Home > HighRoad Solution Demo and Training Workspace > Sandbox | EW > EWN | HRS | Training > Spam Check Results. On the left is a sidebar with icons for various functions. The main content area is titled 'Spam Check Results' with a link to 'Back to EWN | HRS | Training'. A progress bar at the top right shows four steps: 1. Spam Check (active), 2. Link Check, 3. Test Email, and 4. Setup Launch. The main content displays an 'Overall result: Nearly perfect (score: 0.8)' with a green checkmark icon. Below this, a section titled '1. Take a look at these points to get a perfect score:' lists two items: 'I. Your email is lacking a text part. This is unusual for normal email, and will cause problems with users with older systems or webmail systems (score 0.4)' and 'II. The HTML and text parts of your email appear to contain very different content (score 0.4)'. A 'Next: Link Check' button is located at the bottom right of the main content area.



Questions/Answers



Section 3: Tracking & Reporting

Helpful Definitions

Reporting

You can get to the metrics for your individual email one of two ways: either go into the campaign itself and click into the reporting link found in the lower right column or tab over to the reporting tab (found in the left column) and click into the project your email is located and then into the campaign you want to see the report on.

Once you are in the individual report for a campaign, there are several tabs to take you deeper into the analytics of that individual email.

Links

Tabbing over to the links tab gives you a report on each link in the campaign and the count for clicks.

Inbound

Email deliverability on the inbound tab. Inbound provides a deeper dive into the various avenues for a blocked email.

Social

If your email was shared on social, you will have a dashboard of analytics on social shares.

Timeline

View the timeline of opens and clicks over the first few hours of the email send.

Heatmap

A view where recipients spent the most time in your email. Understand how far down the scroll, where they clicked, at a single glance.

Email Clients

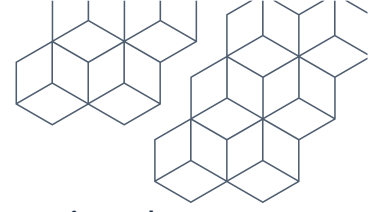
Are Emails read on mobile vs. desktop

Geo Tracking

Drill down by city, state, etc.

Saved Reports

Create a saved report for your Director for example. This creates a sharable link that you can share with someone that doesn't have a login to the platform.

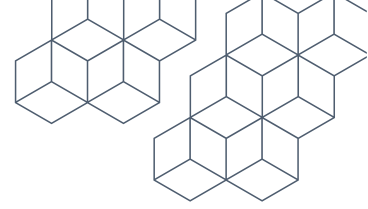


Section 4: Web Analytics

The Adestra web analytics system is a means to provide additional information about the email to your Analytics tool like Google Analytics. We input the domains you want to track and pre-fill a few fields for UTM tracking.

For Source and Medium you will see newsletter and email values respectively. That means that you can drill down into your source traffic in Google Analytics and see traffic coming specifically from email. You have the option on your preset of each campaign to further drill down by "term", "content", and "campaign".

To have this feature turned on, let HighRoad know the domains you intend to track.



More resources:

- [Adestra Roadwork](#)
- [Client Care Support Documentation](#)
- Client Care:

Available: Monday – Friday 7:30 am – 6:00 pm ET

Email: support@highroadsolution.com

Phone: 703-297-8886

