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

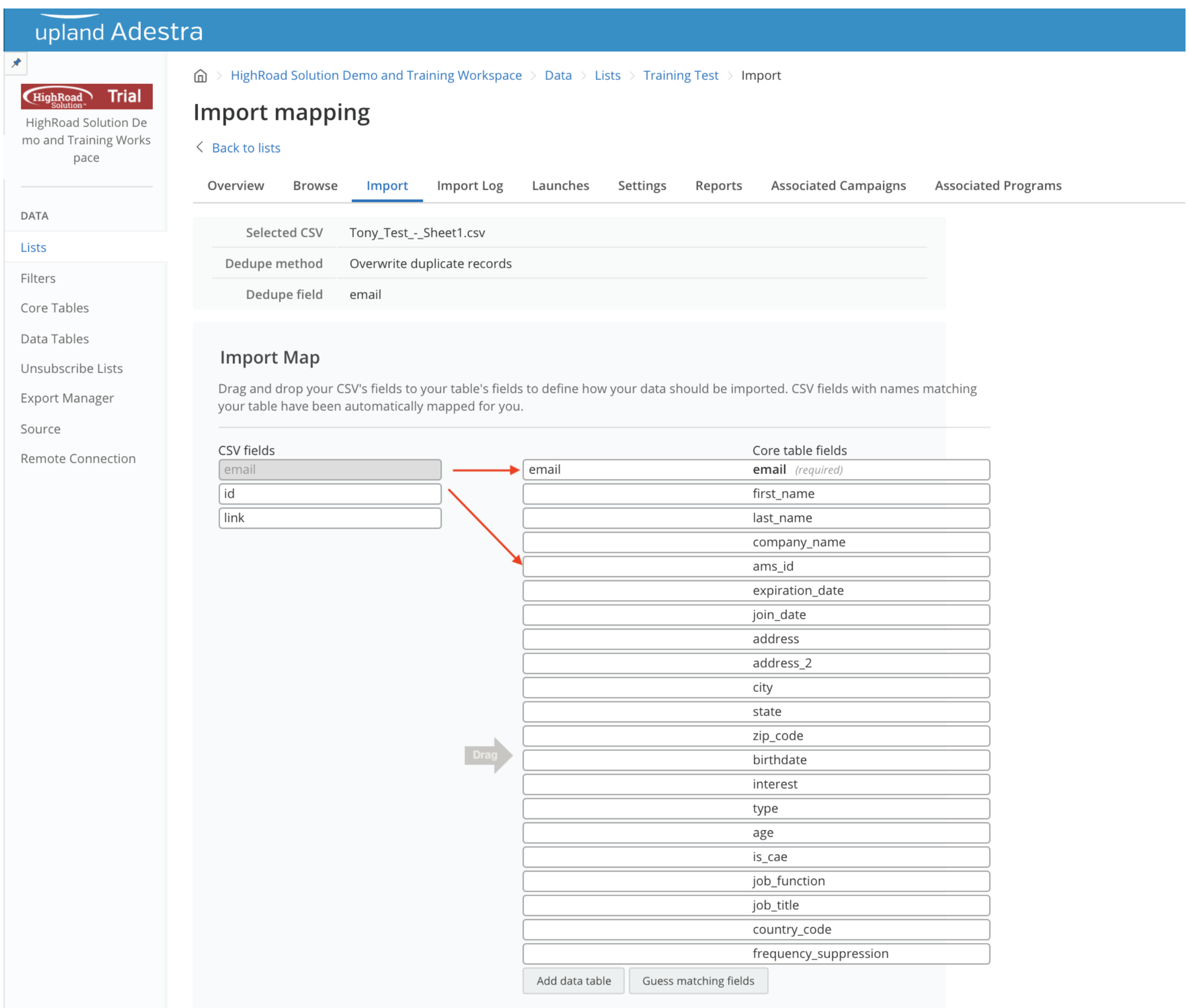
A basic list of contacts for a specific send or as a source for an automation program. You can also add and remove contacts one-off at any time.

Dynamic List

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

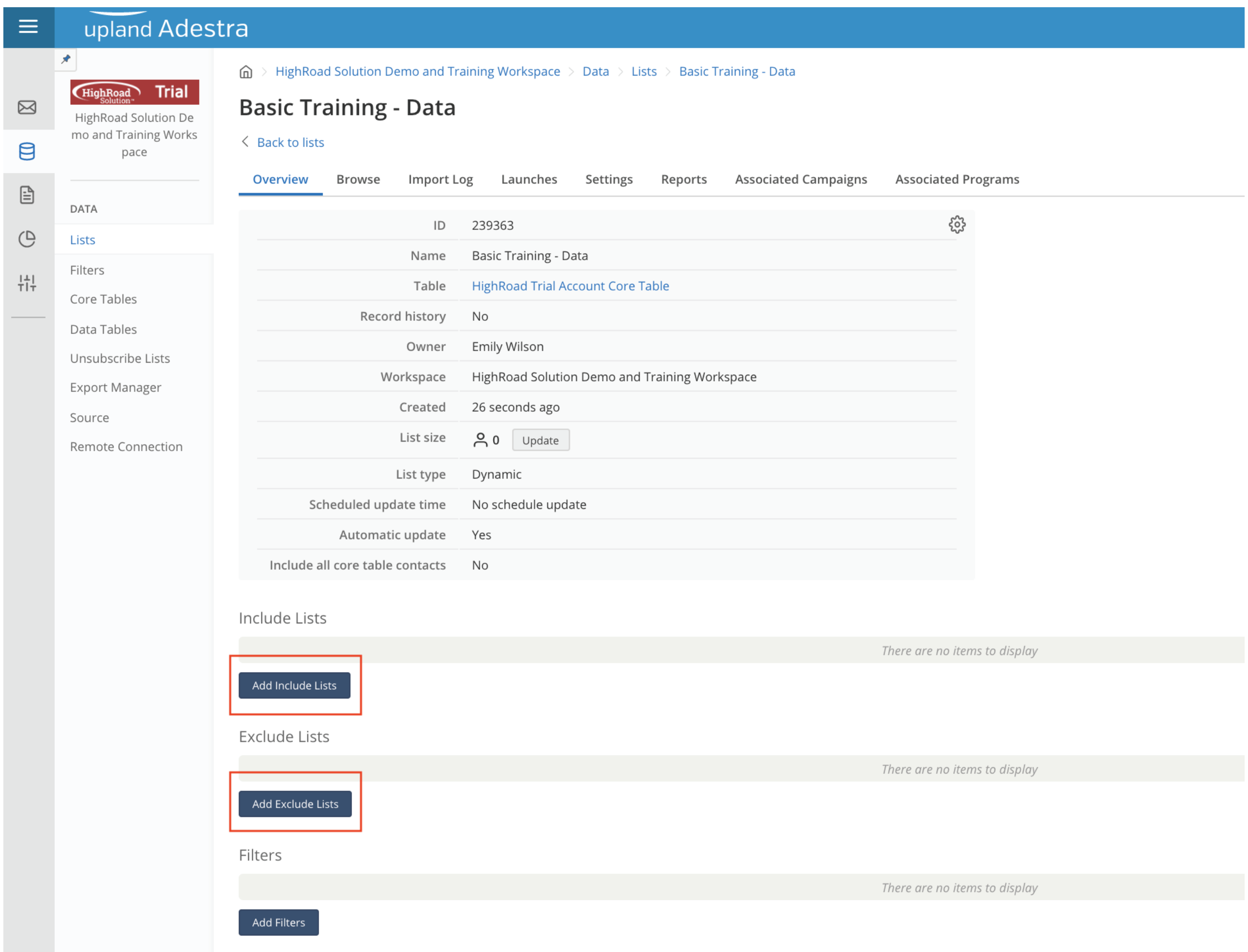
Exercise 1: Upload a standard list

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



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).



Questions/Answers

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

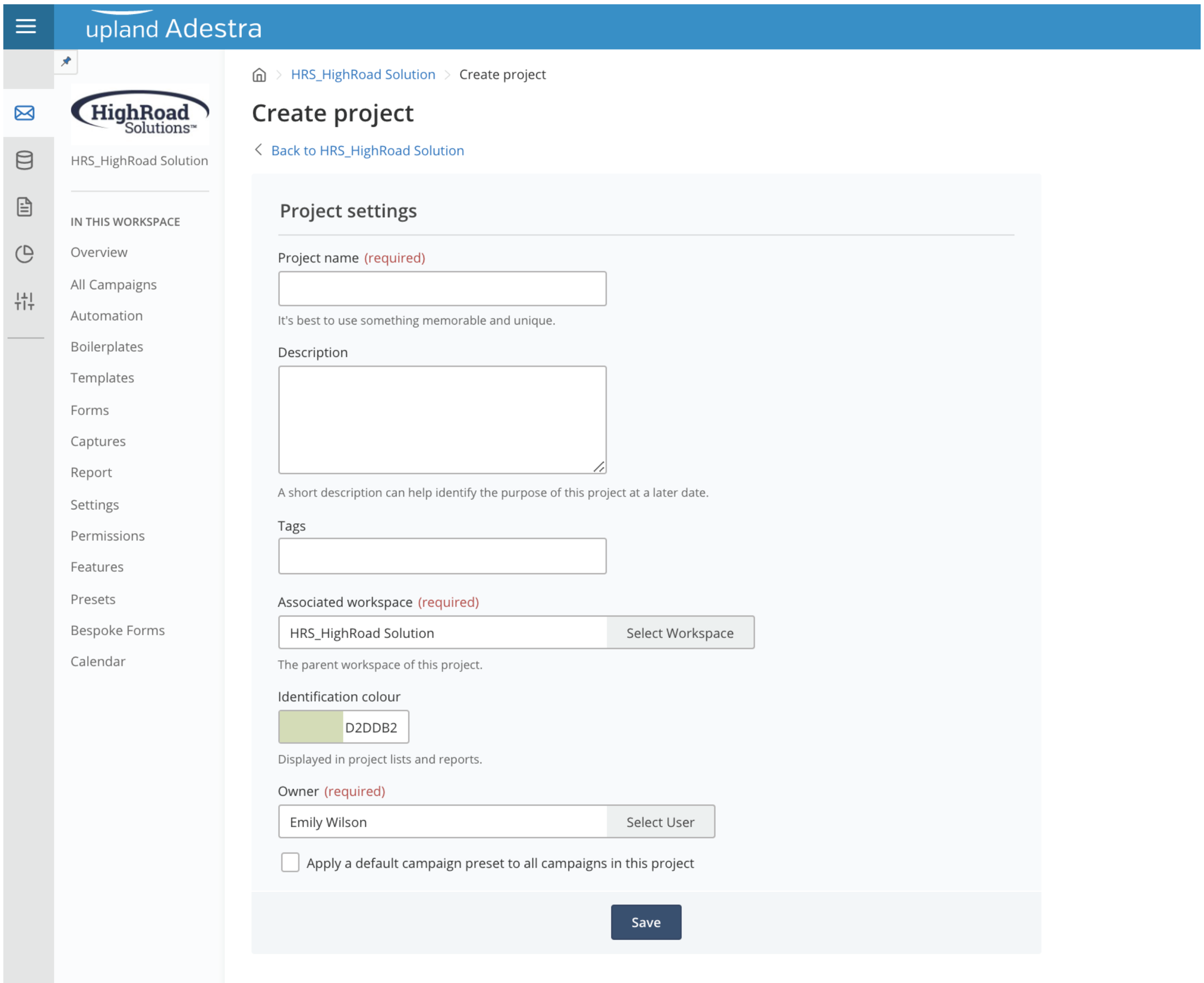
This is an on-demand feature, and if you think this is something you and your team will need contact your Account Executive.

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

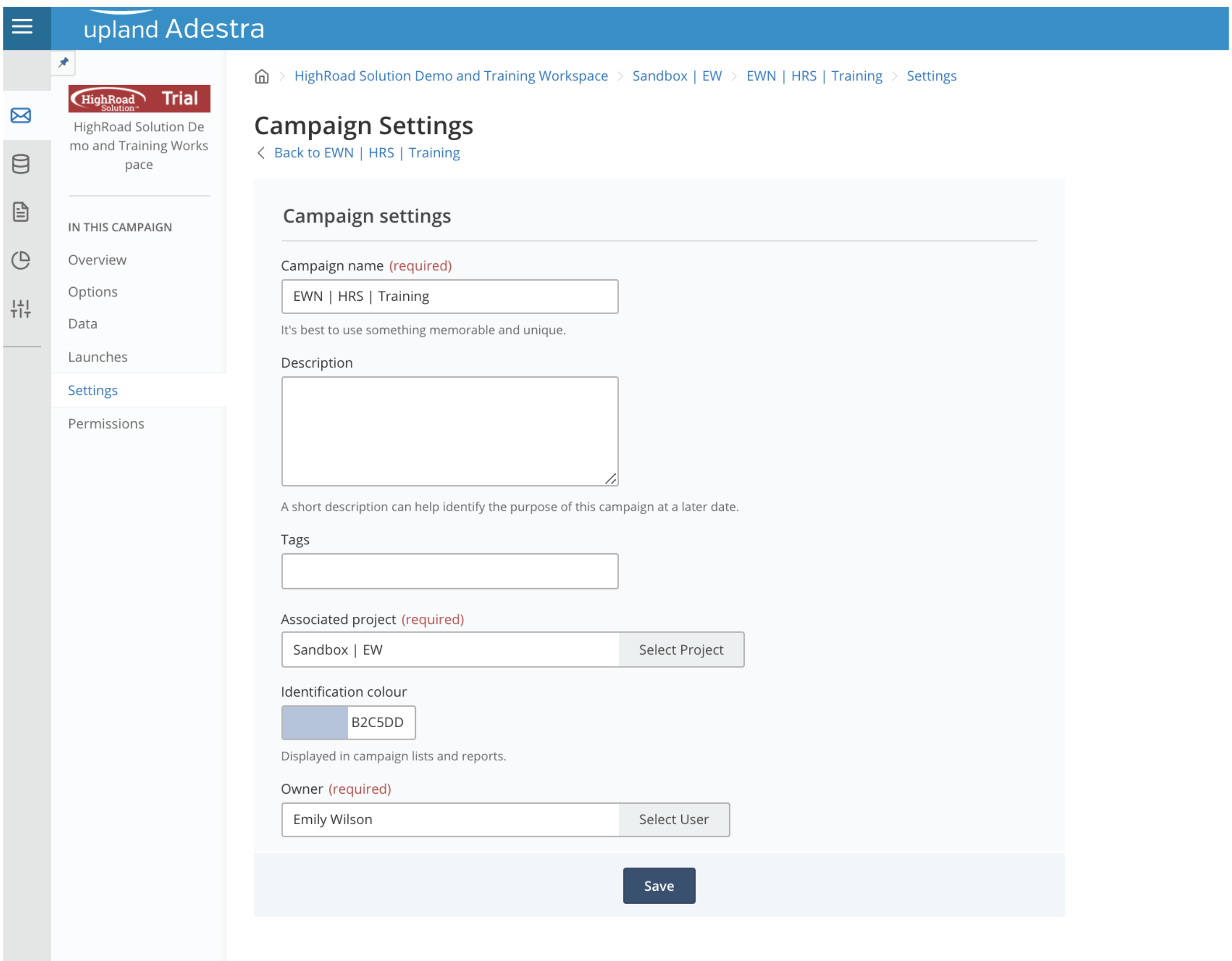
Step 1: Navigate to Create new project on the right-hand side navigation bar
Step 2: Give your project a name using the following naming convention (your Initials – Assoc. Acronym | Training | Test Project).
Step 3: Provide a tag for your project if you are using tags;
Step 4: Scroll down to the bottom of the page and click save.



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



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

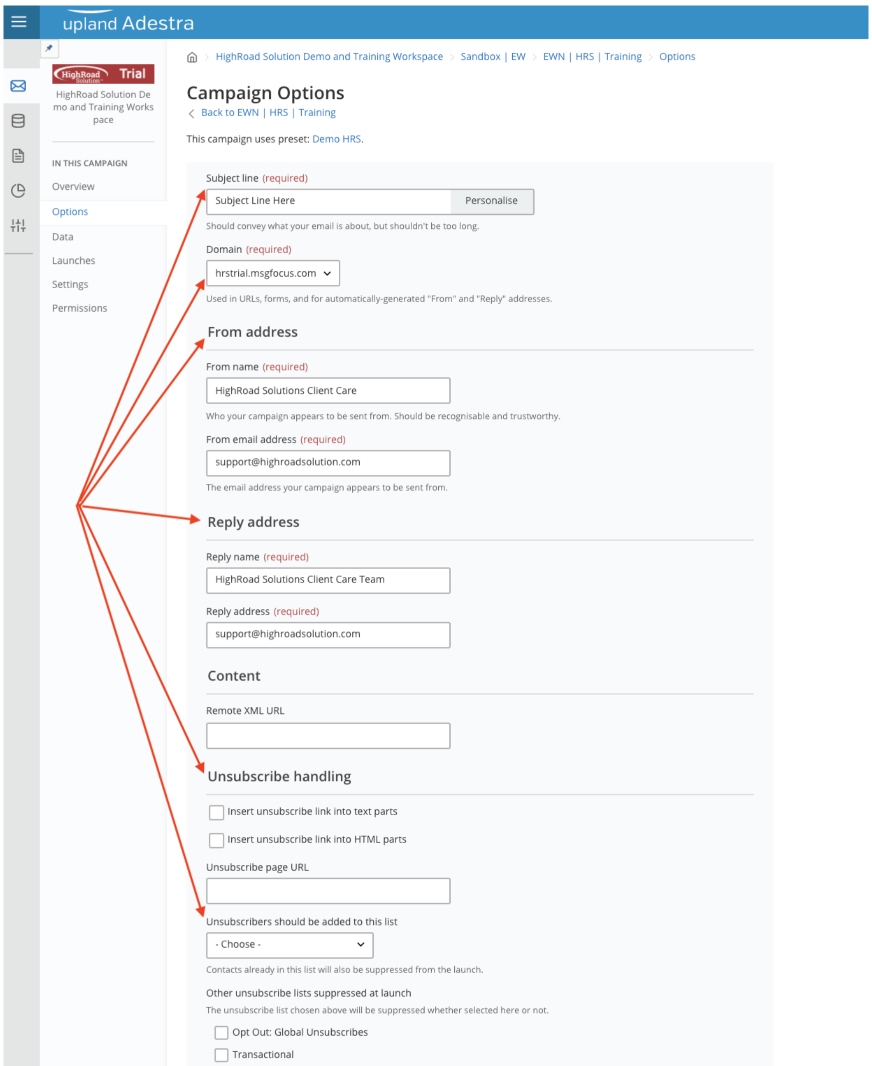
Step 5: Unsubscribe handling (if you have a custom EPC, no need to select an option)

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



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.

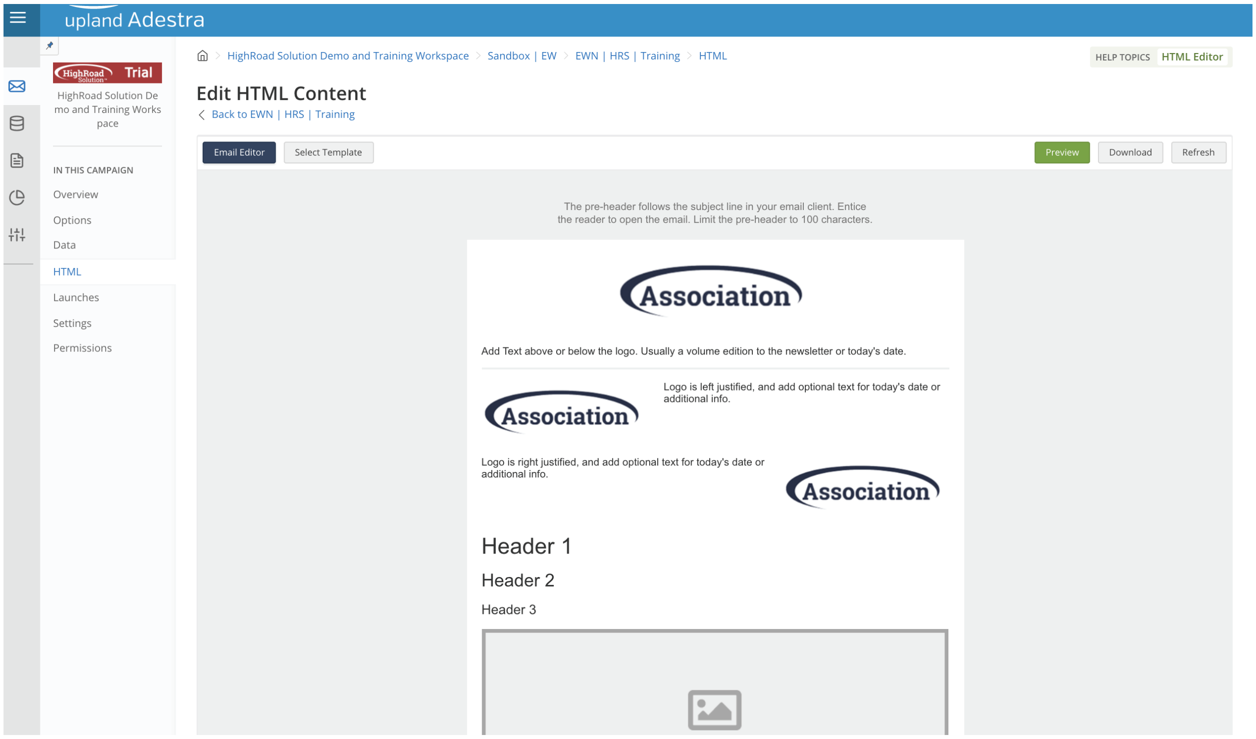
b. Click ok

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.)

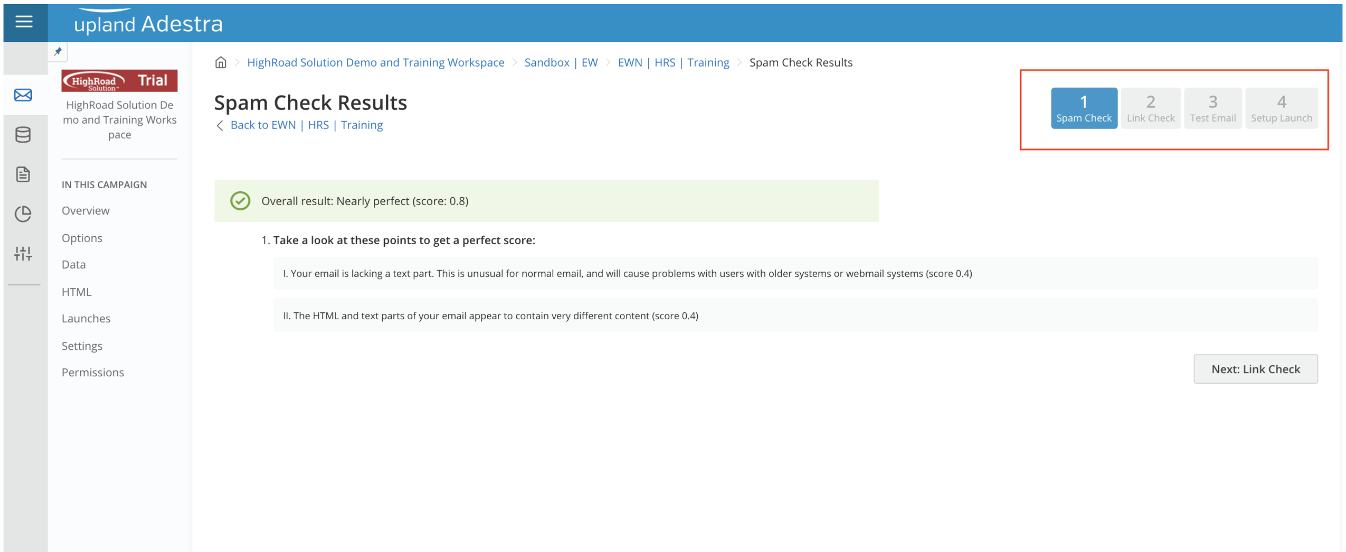
c. Call-To-Action Button: You can modify the placement of the CTA from Left, to center, to right, and finally to hide it all together.



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.

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



Questions/Answers

Section 3: Tracking & Reporting

Helpful Definitions

Reporting

You can get to the metrics for your individual email one of tow 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@highroadsoltuion.com

    Phone: 703-297-8886