



Adestra Administration Handbook

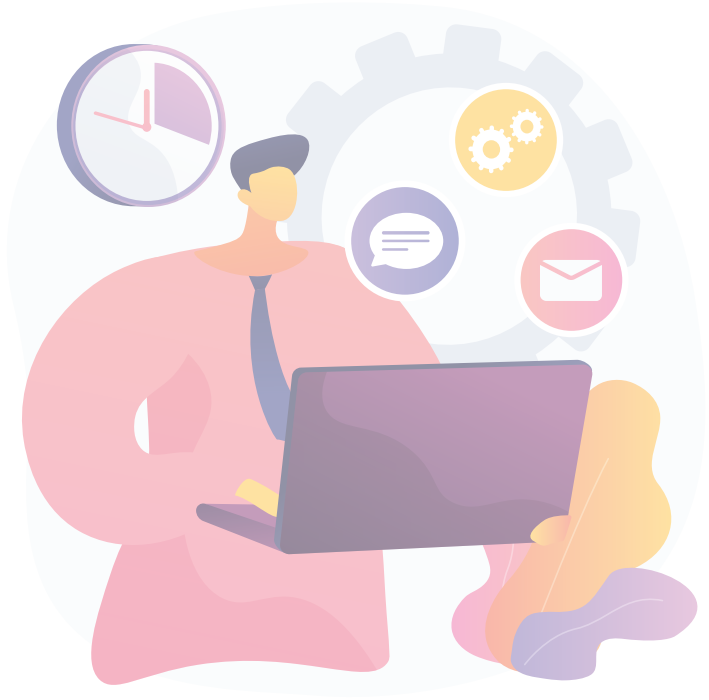
As an account admin you will be able to organize and control several account settings such as creating a workspace, applying permissions, and implementing restrictions. Being the account admin means you can also manage user settings at a granular level, helping to secure contact's data and manually maintain consistency across all workspaces.



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ACCOUNT STRUCTURE

Adestra uses a hierarchy structure, making it infinitely scalable. Once you log in your logged into your Associations' account. Your account overview will display all workspaces which contain projects, which house campaigns.

Workspaces

Workspaces can be useful for company divisions, chapters, and regions, allowing multiple brands, departments, or divisions to exist separately as part of one account. Workspaces contain projects, which in turn can be used for further grouping, and they then contain campaigns.



WORKSPACE

Create New Workspace

As an admin you have the ability to create workspaces. You can create a workspace based on departments or internal projects. i.e., *Membership, Programs, Automations*

Workspace Settings

Workspace name

The name of the workspace. This is how the workspace is referred to throughout the system, so it should be memorable and unique. i.e., *North America, EMEA, APAC or Membership, Programs, etc.*

Workspace name (required)

It's best to use something memorable and unique.

Description

Description is an optional field that can contain any additional workspace information.

Description

A short description can help identify the purpose of this workspace at a later date.



Tagging






You are able to add tags to workspaces from the creation form or via the settings. Press enter or space to add the tag, this will highlight the tag and give you the option to delete it if required.

Tags

What are tags?

Tags allow easy navigation throughout your account and are visible at every level. Using tags can better organize accounts. Grouping related items together, allowing more control over the management of all system levels.

You can set tags on:

-  workspaces
-  projects
-  campaigns
-  lists
-  filters

Tags can be applied when in a creation form or, if already created, via the settings tab.

Identification Color

As a default the system will automatically generate a color for a workspace, but as an Admin you can choose to change the color. This color will display at the header of the top of the screen whenever you are working within the workspace.

Identification colour

Displayed in workspace lists and reports



Owner

The owner of the workspace. This defaults to your user, but if you're creating a workspace for someone else you can change it. The owner of the workspace will be assigned admin rights for it. If you are creating a workspace for a specific user, they will be assigned admin rights, and you may not have access to that workspace after it has been created.

Owner (required)

Apply a default campaign preset to all campaigns in this workspace

Campaign preset

When creating a workspace it is possible to select a default Campaign Preset, which will be applied to any campaigns created within the workspace.

Clicking the Select Preset button opens the preset selector, displaying the available presets for you to choose from.

Owner (required)

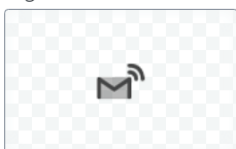
Apply a default campaign preset to all campaigns in this workspace

Campaign preset

Workspace logo

Each workspace has a logo which is displayed in the workspace list alongside the name, and in the top left of the screen whenever you are working in that workspace. Adestra provides a default logo, but you can change this using the drop-down box to select an existing logo in your account, or you can upload a new logo by click the 'Choose File' button. Logos will resize automatically.

Logo



Upload a new logo

 No file chosen

A PNG image with alpha transparency looks best. Images may be scaled down to fit properly.



NEW USERS

Each person who uses the platform will need a 'User' created for them. This is an easy process that can be undertaken by Account Admins only. All users within Adestra have different levels of access and permissions. If you are an admin user you can manage users via the 'Admin' tab in the header bar at the top of the screen. There are various pages within the admin section, and you can navigate between them using the page tabs.

Overview

The overview shows details of the user set up, including the access levels the user has been granted. It indicates which Adestra communications the user is subscribed to, and lists any user groups they belong to.

USERS

Users You are connected from IP:

[USERS](#) [GROUPS](#) [APPROVAL USERS](#) [APPROVAL GROUPS](#) [LOGIN HISTORY](#)



GROUPS

User groups are groups of users assembled under one name. You can create and manage user groups from the 'Groups' tab of the 'Admin' pages. The groups list page displays any existing groups in the account. User groups are used for sending campaign tests to a particular group of internal staff members.

Home > Admin > Users > Groups Help topics [ADMIN OVERVIEW](#) [USER GROUPS](#)

User groups [+ CREATE NEW GROUP](#)

[USERS](#) [GROUPS](#) [APPROVAL USERS](#) [APPROVAL GROUPS](#) [LOGIN HISTORY](#)

| ID | Group Name | Description |
|----|--------------------------|---|
| 1 | HighRoad Solutions Staff | - data download access. - could be used with custom support options |
| 2 | Template enabled | |

NEED SOME HELP?
[Manuals and videos](#)
[HighRoad Support](#)
[1-703-297-8886](#)



APPROVAL USERS

When a campaign requires approval, a copy of your email is sent to a preset list of users in an approval group. To be sent a request, users need to be setup as approval users and assigned to an approval group. The users do not need to be Adestra users, as responding to an approval request does not require them to log in to the system.

You can access the approval user pages via the 'Admin' tab in the header bar at the top of the screen, then the 'Approval Users' tab. The approval users list page displays any existing approval users.

Approval users

USERS GROUPS **APPROVAL USERS** APPROVAL GROUPS LOGIN HISTORY

Download icon Search: erika CLEAR SEARCH

| ID | Name ↑ | Email | Password |
|----|---------------|----------------------------|----------|
| 88 | Erika Beshore | erika@highroadsolution.com | |

APPROVAL GROUPS

Approval groups contain one or more approval users, and each user can be assigned to multiple groups. As an admin user you can access the user group pages via the 'Admin' tab in the header bar at the top of the screen, then the 'Approval Groups' tab. The groups list page displays any existing approval groups.

Approval groups

USERS GROUPS APPROVAL USERS **APPROVAL GROUPS** LOGIN HISTORY

Download icon Search term

| ID | Group Name | Workspace |
|----|-----------------------|---|
| 3 | Demo : HighRoad | HighRoad Solution Demo and Training Workspace |
| 4 | Demo: HighRoad Notify | HRS_HighRoad Solution |

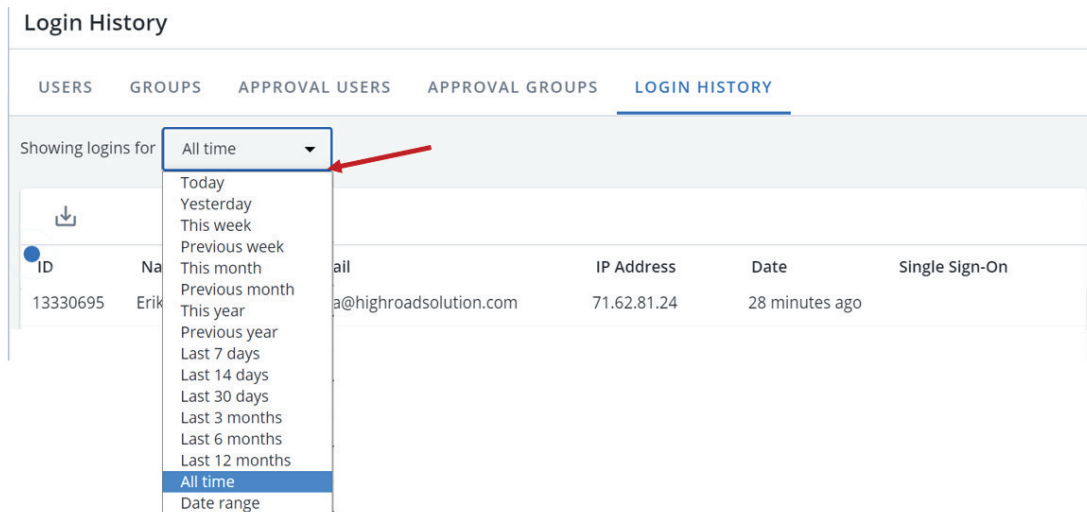
LOGIN HISTORY

The login history page contains a back-dated record of every login to your Association's account. This provides some oversight on your account usage, and can be beneficial for security purposes, allowing you to identify who is accessing your account at any point.

You can access the login history via the 'Admin' tab in the header bar at the top of the screen, then the 'Login History' tab.

Each login record lists the name, username, email, IP address, and the date and time. It also indicates which version of Adestra the user logged into; displaying 'Yes' or 'No' in the 'New Version' column.

The date selector will default to 'All time', but you can refine the date range using the drop-down box to show the login history for different time periods.

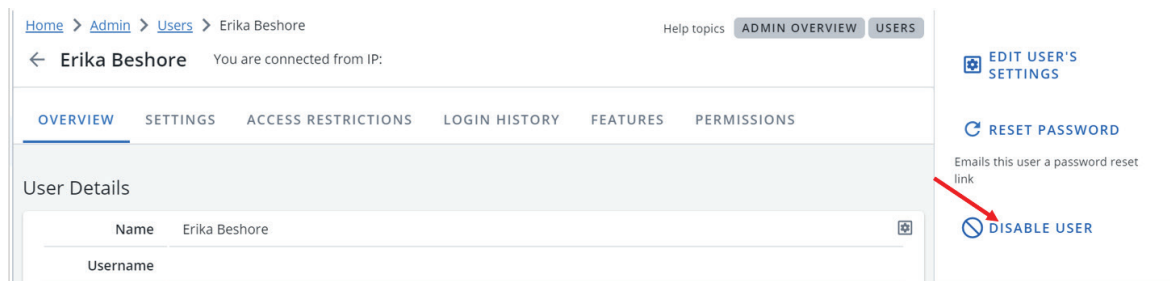


You can also see the login in history for individual users by clicking the Users tab, selecting the particular user, and then selecting the Login History tab.

DISABLING USERS

Disabling users ensures only those who should have access do have access to Adestra; disabled users are unable to login to Adestra but admins are still able to maintain the reporting and their usage data.

To disable users you must first be in the Admin tab, go to the user you wish to disable and then click the 'Disable User' button in the administration sidebar.



This user will then not show in the admin tab unless the 'Include Inactive' checkbox is checked. If it is then the contact will appear, greyed out.

| ID ↑ | Full Name | Username | Email | Active | Admin | Acc Admin |
|------|----------------|----------|-------------------------------|--------|-------|-----------|
| 2 | | | @highroadsolution.com | | ✓ | |
| 3 | Ron McGrathapi | rmcgrath | ron@highroadsolution.com | ✓ | ✓ | ✓ |
| 4 | Erika Beshore | ebeshore | erika@highroadsolution.com | ✓ | ✓ | ✓ |
| 5 | Adam Higgins | ahiggins | ahiggins@highroadsolution.com | ✓ | ✓ | ✓ |
| 6 | | | @highroadsolution.com | | ✓ | |



REACTIVATE USERS

To reactivate a user you must have the 'Include Inactive' checkbox ticked. You can then select the disabled user you wish to reactivate. The administration sidebar will now have changed and you can reactive by selecting 'Activate User'.

The screenshot shows the user management interface. On the left, there are tabs for OVERVIEW, SETTINGS, ACCESS RESTRICTIONS, LOGIN HISTORY, FEATURES, and PERMISSIONS. The 'OVERVIEW' tab is selected, showing 'User Details' with fields for Name, Username, Email address (@highroadsolution.com), Timezone (America/New_York), Active (No), Admin (Yes), Account admin (No), Data admin (Yes), and Date created (05 Oct 2015 08:26). On the right, there is a sidebar with 'EDIT USER'S SETTINGS' and 'ACTIVATE USER' (highlighted with a red arrow). Below 'ACTIVATE USER', it says 'An activation email will be sent to @highroadsolution.com'. At the bottom of the sidebar, there is a 'NEED SOME HELP?' section with links for 'Manuals and videos', 'HighRoad Support', and '1-703-297-8886'.

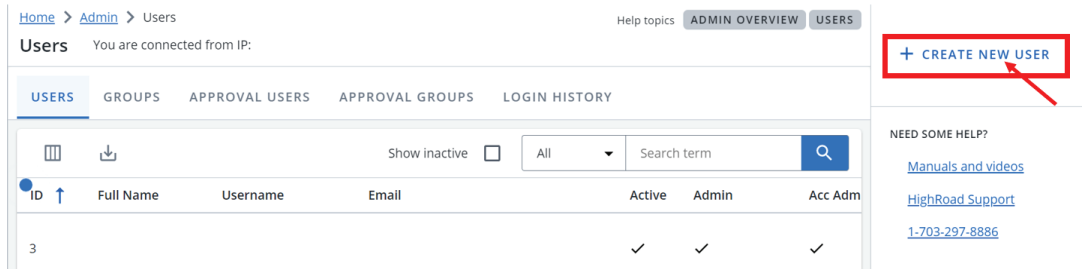
A reactivated user will receive an email, asking them to set their new Adestra password. This link is valid for **24 hours** and the email will show who requested the user to reactivate.



Create New User

Step 1.

To create a new user you will need to go to Admin --> Users
Once here click the 'create user' button located in the right hand side.



Step 2.

Complete the 'user details'

User details

Full name

Enter the full name of the new user.

Full name (required)

Username

Give the new user a Username, which will be used for Logging in. We recommend using the first initial and surname. i.e., John Smith becomes jsmith; you can however choose any acceptable username.

Note: Only alphanumeric characters are accepted, with a limit of 32 characters. Email address is not accepted.

Username (required)

Email address

Provide you new user's email address; this will be used to send notifications, communications or password reset requests to.

Email address (required)



Time zone

Select the time zone the user will be using the platform in. This will make the dates and times localized to the user on the platform.

Time zone

Account-wide administration

If your new user you are creating is also an Admin user, you need to select what privileges they will have. You can view the Admin Rights table for what each type of user can do.

Account-wide administration

The following rights apply to all workspaces in the account

- Admin access to all workspaces, projects and campaigns
- Account admin access: create and manage users and account-wide features
- Data admin access: create and manage core/data tables, access data anywhere within the account

Activate User

Checking 'Activate User' will send a link to the email address provided to the user, asking them to set a password and activate their account.

Activate user

Emails the user a link to set their password to activate their account.

Note: *If you require the user to have further custom settings enabled (such as disabling launch), then uncheck and complete the form. So these can be enabled—before the user can access the platform.*

Mailing preferences

Decide the user's mailing preferences, including whether they opt in for system updates and maintenance communications as well as information about new products and services.

Mailing preferences

MessageFocus product announcements

Important information for MessageFocus users, including maintenance announcements and details of new features.

Adestra client communications

Information about new products, features and services.



Access restrictions

This controls the locations from which users can access Adestra.

It is required to select the IP access the new user will have.

Whether it's from all IPs, authenticated IPs only or a specified set of IPs.

If you select Authenticated access or Restricting to a set of IPs, you will also be shown the options to 'Enable Data Download' and 'Require OTP Token'.

 **Enable Data Download:** allows a user to download contact data

 **Require OTP Token:** user will require an OTP token to sign on

You can also choose to enable single sign-on for the user, should you wish.

IP address access (required)
Control the locations from which this user can access MessageFocus.

Allow access from any IP

Allow access from any authenticated IP
Requires the user verify that IP via an automated email.

Restrict access by specifying a set of allowed IPs
Only the IP addresses defined in the **Access Restrictions** tab are allowed.

Enable single sign-on authorisation for this user

Save and Set Permissions

Click save and your user will have been created.


Once you have saved your users details you now will need to set their permissions and features.


Step 3.


Set workspace permissions

User will need permissions to their workspaces.

Each type of permission allows for different degrees of access and management.

 **Normal** - a user with 'normal' permissions has the ability to create, and launch campaigns, and create and import list(s).

 **Admin** - a user with 'admin' has access to all workspaces, projects, campaigns and access to the contact data tab.

 **View** - a user with 'view' is a restricted user and can only view lists and cannot create any campaigns, list and/or launch campaigns.



| OVERVIEW | SETTINGS | ACCESS RESTRICTIONS | LOGIN HISTORY | FEATURES | PERMISSIONS |
|--|-----------------------|---------------------|---|----------|----------------------------------|
| Workspaces | | | | | |
| <input type="text" value="Search term"/> | | | | | <input type="submit" value="Q"/> |
| ID | Workspace Name | Access | Alter | | |
| 1 | HRS_HighRoad Solution | | <input type="button" value="v"/> None Admin Normal View | | |

Step 4.

Features

Assigning features, as an admin you will enable or disable configurable features for each user.

There are a number standard features that will be turned on by default within your account that will not appear in the drop-down.

You can enable or disable features using the drop-down boxes on the left hand side of each feature.

| Feature | Beta | Enabled | Alter |
|--------------------------------|------|---------|---|
| Summary Export | | ✓ | <input type="button" value="v"/> Enable Disable |
| Download Message | | ✓ | <input type="button" value="v"/> |
| Filter by Postal Code Location | | ✓ | <input type="button" value="v"/> |
| Template Selector | | ✓ | <input type="button" value="v"/> |

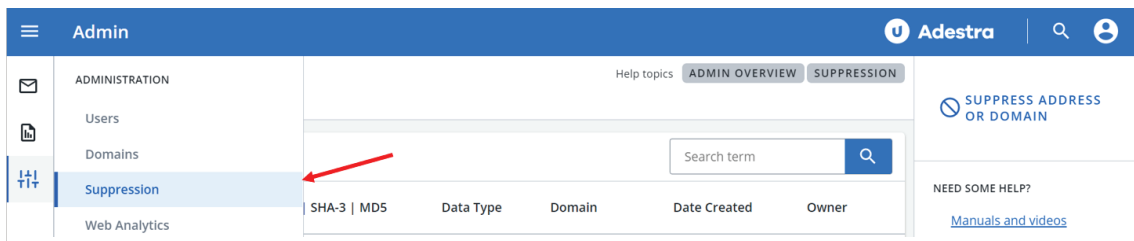
SUPPRESSION

Adestra's unsubscribe list provides a flexible means of managing unsubscribes, sometimes it is necessary to completely prevent delivery to a particular address. Any email addresses or domains appearing on the suppression list will be completely suppressed, from all launches, in the account.

With support for SHA-3 and MD5 hash suppression our system also alleviates the burden of handling client data after suppression, alongside preventing their data from being compromised.

Accessing Suppression List

To access the suppression list go to the left-hand side NAV bar; scroll to suppression.



The Suppression page displays a list of email addresses (plain text, SHA-3 or MD5) and domains that the account will never send to.

The screenshot shows the 'Suppression' page in the Adestra Admin interface. The breadcrumb trail is 'Home > Admin > Suppression'. The page title is 'Suppression'. There are tabs for ADMIN OVERVIEW and SUPPRESSION. A search bar is present with a search icon and a 'CLEAR SEARCH' button. The filtering is set to 'USERS: ADESTRA ADMIN'. The table below lists suppression entries with columns for ID, Email | Domain | SHA-3 | MD5, Data Type, Domain, Date Created, and Owner.

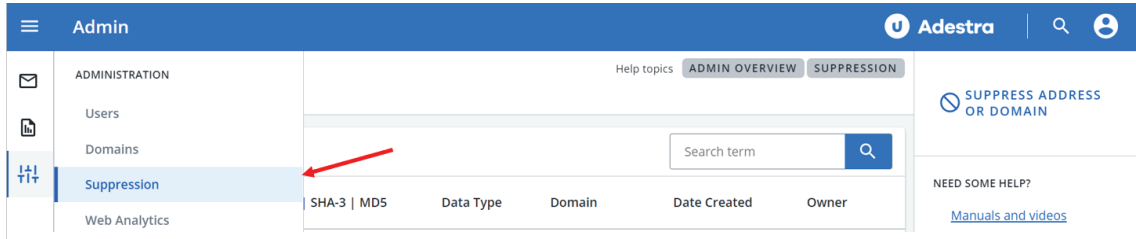
| ID | Email Domain SHA-3 MD5 | Data Type | Domain | Date Created | Owner |
|----|------------------------------|-----------|--------|-------------------|---------------|
| 1 | @juno.com | Email | | 07 Feb 2017 07:18 | Adestra Admin |
| 2 | @netzero.net | Email | | 15 Feb 2017 04:46 | Adestra Admin |
| 3 | @netzero.net | Email | | 03 Mar 2017 11:48 | Adestra Admin |

Address Suppression

An admin has access to suppress one or multiple addresses.

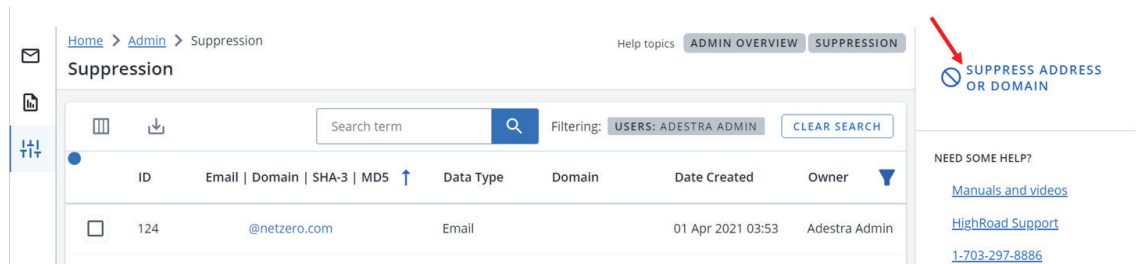
Step 1.

Go to Admin --> suppression



Step 2.

Navigate to 'SUPPRESSION ADDRESS OR DOMAIN' on the right-hand side.



Step 3.

Choose your 'import type' if you are suppression a single address, select single or if you are suppression multiple address or want to import using a CSV file choose your type.

Single

Choosing single as your import type; allows you to suppress a single email address or domain; and choose the address format. Either Email, Domain etc., and click save.

Single Email Address

Suppress

Import Type

Single
 Multiple
 Import CSV File

Single import

Address format

Email
Enter an email address in plain text.
 Domain
Enter an email domain in plain text.
 SHA-3-256
Enter an email address as a SHA-3-256 hash in hexadecimal format.
 MD5
Enter an email address as a MD5 hash in hexadecimal format.

Email Address (required)

erika@highroadsolution.com



Single Domain

Suppress

Import Type

Single
 Multiple
 Import CSV File

Single import

Address format

Email
Enter an email address in plain text.
 Domain
Enter an email domain in plain text.
 SHA-3-256
Enter an email address as a SHA-3-256 hash in hexadecimal format.
 MD5
Enter an email address as a MD5 hash in hexadecimal format.

Email Domain (required)

Multiple Values

Enter each value on a separate line. The text box will accept plain text email addresses or domains.

← Suppress address

Suppress

Import Type

Single
 Multiple
 Import CSV File

Multiple import

Multiple values (required)

Import CSV File

Your Adestra admin can import a .CSV file which must contain column heading 'email'. Once your .CSV file is saved; click choose file and select your .CSV file, and click save.

Suppress

Import Type

Single
 Multiple
 Import CSV File

CSV import

Email address CSV file (required)

No file chosen

Step 4.

Once you have browsed and uploaded your .CSV file, scroll down to the bottom of the page and click 'save'.



Remove a Suppressed Address

As an admin you have the ability to remove a member record from the suppression list, by selecting the record and click the 'Remove Selected' button below the table.

Click the check box next to the record that needs to be removed; and click '**REMOVE SELECTED**'

Suppression

| REMOVE SELECTED | | | | | | |
|-------------------------------------|------|------------------------------|-----------|--------|-------------------|---------------|
| <input type="checkbox"/> | ID ↑ | Email Domain SHA-3 MD5 | Data Type | Domain | Date Created | Owner |
| <input checked="" type="checkbox"/> | 1 | @juno.com | Email | | 07 Feb 2017 07:18 | Adestra Admin |



KNOWN BOUNCES

The Adestra known bounce system is an integral part of the platform which recognizes and separates previously bounced email addresses and will automatically suppress them from any future sends. Addresses are added to the previously bounced suppression list when Adestra receives three or more hard bounces, over 16 days without one successful delivery.

As an Account Admin you have the ability to remove any address from the know bounce list.

You will want to make sure first the member's email address is a valid address. Once you have confirmed that email address is valid take the following steps;

Step 1.

Navigate to Administration on the right-hand side navigation bar.

Step 2.

Scroll down to Known Bounce





Step 3.

On the “Remove Known Bounce” and add the email address you wish to remove to the email text box and click remove.

Email (required)

The email address to be removed from Known Bounces.

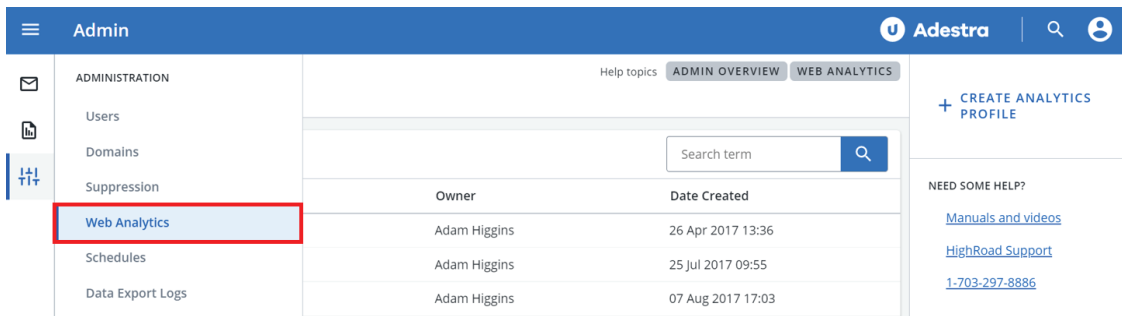
REMOVE

WEB ANALYTICS

The web analytics system allows admin users to create profiles that describe a single web analytics system. Each profile contains a list of domains on which the analytics system is installed, and a list of the fields and values that should be provided when linking to one of those domains.

To begin using web analytics integration you will need to create a profile for the web analytics system in question. First you will need to do determine the fields the analytics system understands, this may require you to consult those responsible for the analytics system and ask them which fields are supported and how they should be populated.

You can access the web analytics interface via 'Admin' in the right-hand side navigation bar and then choosing 'Web Analytics'.



The screenshot shows the Adestra Admin interface. The left-hand side navigation bar is open, and the 'Web Analytics' option is highlighted with a red box. The main content area displays a table with columns for 'Owner' and 'Date Created'. The table contains three rows of data. A search bar is visible above the table. On the right side, there is a '+ CREATE ANALYTICS PROFILE' button and a 'NEED SOME HELP?' section with links to 'Manuals and videos', 'HighRoad Support', and '1-703-297-8886'.


| Owner | Date Created |
|--------------|-------------------|
| Adam Higgins | 26 Apr 2017 13:36 |
| Adam Higgins | 25 Jul 2017 09:55 |
| Adam Higgins | 07 Aug 2017 17:03 |

Note: Adestra web analytics cannot work independently; it can work only in conjunction with web analytics systems i.e., Google analytics.

Analytics Profile

Profiles

The 'Profiles' page displays any existing profiles in your account.



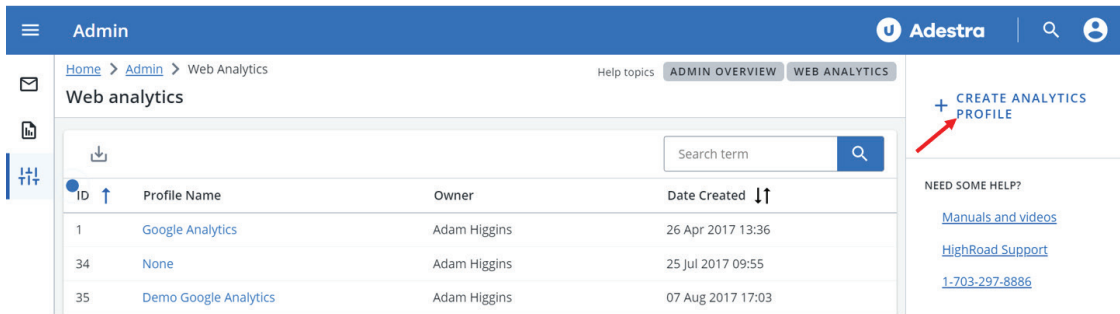
The screenshot shows the 'Web analytics' page in the Adestra Admin interface. It features a search bar at the top right and a table with columns for 'ID', 'Profile Name', 'Owner', and 'Date Created'. The table contains three rows of data. A download icon is visible in the top left corner of the table area.

| ID | Profile Name | Owner | Date Created |
|----|-----------------------|--------------|-------------------|
| 1 | Google Analytics | Adam Higgins | 26 Apr 2017 13:36 |
| 34 | None | Adam Higgins | 25 Jul 2017 09:55 |
| 35 | Demo Google Analytics | Adam Higgins | 07 Aug 2017 17:03 |



Create a Profile

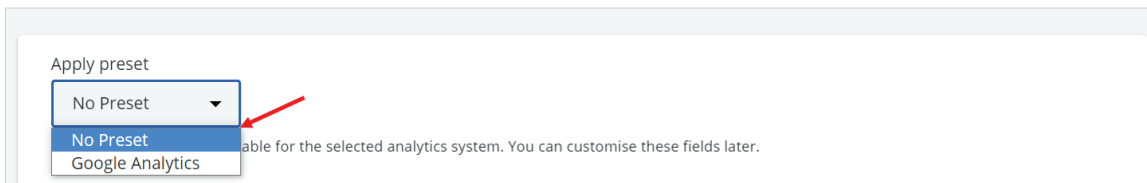
To create a new profile for the web analytics system navigate to the 'Create Profile' link on the right-hand side navigation bar.



Preset

When creating a new profile you can choose a preset which will add some pre-defined fields, suitable for the selected analytics system.

Alternatively you can choose to have no preset, and the profile will be empty until you add fields manually.



Name

The name you enter will be used to identify the analytics profile, we recommend using a unique and memorable name.

Name (required)

Description

The description is optional and can contain any other relevant information you like.

Description

A short description can help identify the purpose of this analytics config at a later date.



Profile Overview

Once a profile has been created, you will be directed to the profile's overview page, from which you can navigate the different profile pages.

The profile overview shows basic details of the profile, including when it was created and by which user.

| OVERVIEW | | SETTINGS | FIELDS | DOMAINS |
|----------|-------------------|----------|--------|---------|
| Name | None | | | |
| Owner | Adam Higgins | | | |
| Created | 25 Jul 2017 09:55 | | | |

You can edit the name and description of the profile using the 'Edit' link in top right corner of the section

| OVERVIEW | | SETTINGS | FIELDS | DOMAINS |
|----------|-------------------|----------------------|--------|---------|
| Name | None | Edit | | |
| Owner | Adam Higgins | | | |
| Created | 25 Jul 2017 09:55 | | | |

or by clicking 'Settings' tab.

| OVERVIEW | SETTINGS | FIELDS | DOMAINS |
|----------|-------------------|----------------------|---------|
| Name | None | Edit | |
| Owner | Adam Higgins | | |
| Created | 25 Jul 2017 09:55 | | |

Fields

The fields in a profile represent each key and value pair that will be added to the URL querystring. It is important to make sure that the analytics system in use on your site can understand these values before adding them, or they will likely be ignored.

If you choose a preset during the initial creation, the profile will contain pre-defined fields that the particular analytics system understands. For example a profile with a Google Analytics preset would contain the following fields:

| OVERVIEW | | SETTINGS | FIELDS | DOMAINS | |
|--------------------------|-----|----------------------------|------------|-------------|-----------------------------|
| | | | | | |
| ID | Key | Value | Type | Description | |
| <input type="checkbox"/> | 1 | utm_source | newsletter | variable | Google Analytics UTM Source |
| <input type="checkbox"/> | 2 | utm_medium | email | variable | Google Analytics UTM Medium |



Add New Field

You can create a new field by clicking the 'ADD NEW FIELD' link in the sidebar, or you can select an existing field to edit it.

| ID | Key | Value | Type | Description |
|----|------------|------------|----------|-----------------------------|
| 1 | utm_source | newsletter | variable | Google Analytics UTM Source |

Field Details

Field name and description

When you create a new field, you are required to enter a field name (represents Key) and description. The field name will appear in the URL with the field value. The description field is used simply to identify the field for users, which can be useful with analytics systems that use complicated rules as their keys.

Field details

Field name (required)

Description (required)

Field Contents

Field Types

There are four different ways you can generate field types;

Text

A text field is a fixed value; it will produce a key and value pair that will never change.

Field type (required)

Text value

A static value to be recorded in the analytics data.

System value

Data from the campaign to appear in the resulting URL, e.g the campaign name or subject line.

Contact field

Data from a core table or data table field from the contact who clicked the link, e.g their name or email address.

User-defined variable

Creates a field visible in the campaign options form. The campaign author can supply a value at the time of creating a campaign.

Text value



System value

The system value field type allows you to select some data about the campaign itself to appear in the resulting URL, for example the campaign name or subject line.

System value ←

Data from the campaign to appear in the resulting URL, e.g the campaign name or subject line.

Contact field

Data from a core table or data table field from the contact who clicked the link, e.g their name or email address.

User-defined variable

Creates a field visible in the campaign options form. The campaign author can supply a value at the time of creating a campaign.

System value

- Choose
- ad_tag_integer
- campaign_id
- campaign_name
- campaign_ref
- contact_guid
- contact_id

For example, assuming that the campaign was called 'campaign_id', the field in the above screenshot would produce: ***http://domain.tld/?campaign_name=campaign_id***

Contact field

A contact field is a core table or data table field from the record of the contact who clicked the link, for example their name or email address.

You can select a table using the drop-down box, and this will display all of the fields within the table for you to select from. Once you have selected a field and clicked 'Okay', it will be displayed in the contact field text box.

Data from the campaign to appear in the resulting URL, e.g the campaign name or subject line.

Contact field

Data from a core table or data table field from the contact who clicked the link, e.g their name or email address.

User-defined variable

Creates a field visible in the campaign options form. The campaign author can supply a value at the time of creating a campaign.

Contact Field

DO NOT USE | Highroad Solution
DO NOT USE | Toolkit Test List
HighRoad Solutions | Subscriber Table

SELECT FIELD

Admin | Adestra

Text value

A static value to be recorded in the analytics data.

System value

Data from the campaign to appear in the resulting URL, e.g the campaign name or subject line.

Contact field

Data from a core table or data table field from the contact who clicked the link, e.g their name or email address.

User-defined variable

Creates a field visible in the campaign options form. The campaign author can supply a value at the time of creating a campaign.

Text value

SAVE

Chat



For example, assuming you have gender information in your data, and the contact who clicked was recorded as email, 'email' would display in the URL as:
http://domain.tld/?email=email


User-defined

A user-defined variable field allows the user creating the campaign to enter information for the analytics system to use. Once the field has been set up, it will be displayed as an additional option in the campaigns options form, with a means for the user to define a value for it.

User-defined variable 

Creates a field visible in the campaign options form. The campaign author can supply a value at the time of creating a campaign.

User-defined variable options

newsletter 

Single or multi-line values. A single line value will add a text box in the campaign options, with that value prefilled. A multi-line value will add a dropdown field with each value as an option.

There are three different ways that variable fields can be set up, depending on what is entered in the 'Variable options' text box. Below are a number of examples of how different variables would appear the in campaign options form.

Blank value

Leaving the variable options blank will give a blank text box in the campaign options screen, in which the user can enter any value they choose.

ZHRS_TEST_UTM_Newsletter

This field is part of your 'Google Analytics' analytics profile

Single-line value

Entering a single-line into the variable options will give a text box pre-filled with that value in campaign options. The user can leave the description as it comes, or they can edit it to a value of their choice.

ZHRS_TEST_UTM_Newsletter

Newsletter


This field is part of your 'Google Analytics' analytics profile



Multiple-line value

You can enter multiple-line values, which will give a drop-down box in the campaign options for the user to select from.

ZHRS_TEST_UTM_Newsletter

- Newsletter
- EPC
- Webinars

our 'Google Analytics' analytics profile


SCHEDULES

The schedules section provides a central location for admins to view the up-coming scheduled activity of their account, including launches, imports, exports and recurring campaigns.

You can access Schedules via the Admin tab in the header bar at the top of the screen, and then choosing 'Schedules' from the page tab bar. The schedules are divided into various pages which you can navigate between using the page tabs.


Launches

The 'Launches' page displays all of the pending launches scheduled in the account. You can click the scheduled date or launch reference to view more information, and clicking the campaign name will direct you to that particular campaign's overview.

| Scheduled launches | | | | | | |
|---|---------|-------------------|---------------------|--|----------------|--------------|
| LAUNCHES | IMPORTS | EXPORTS | RECURRING CAMPAIGNS | PENDING APPROVALS | | |
|  | | | | | | |
| <input type="checkbox"/> | ID | Date Scheduled | Launch Reference | Campaign | Owner ↓ | Date Created |
| <input type="checkbox"/> | 265866 | 21 Sep 2021 10:00 | ncrilley | Webinar Registration iOS & Budgeting | Nicole Crilley | 17 Sep 2021 |

Imports

The 'Imports' page displays up-coming automated imports, where Adestra fetches data files and imports automatically into your account. If there are any automated imports set up in the account, this section will show the details of the next scheduled import only.

| LAUNCHES | IMPORTS | EXPORTS | RECURRING CAMPAIGNS | PENDING APPROVALS | | |
|---|-------------------|---------------|---------------------|-------------------|--|--|
| Import Manager | | | | | | |
| ID | Default Workspace | File Location | Report Email | Next Run | | |
| There are no items to display | | | | | | |
| Remote Lists | | | | | | |
|  | | | | | | |
| List | | | | Next Run | | |
| SF Campaign Announcement | | | | Today at 23:00 | | |

Exports

The 'Exports' page displays the details of data exports scheduled across the whole account, including whether or not the export has been enabled to run and at what frequency. If an export is enabled, the Next Run column will show the date and time of the next time it is scheduled to run. You can click on the name of the export to view the export manager.

Home > Admin > Schedules > Scheduled exports Help topics ADMIN OVERVIEW SCHEDULES

Scheduled exports

LAUNCHES IMPORTS **EXPORTS** RECURRING CAMPAIGNS PENDING APPROVALS

| ID | Export Name | Workspace | Next Run | Frequency | Return Method | Enabled |
|------|---|---|-------------------|-----------|---------------|---------|
| 5782 | SF HighRoad Demo and Training | HighRoad Solution Demo and Training Workspace | 21 Sep 2021 09:00 | day | sf | ✓ |
| 3435 | Adestra Advanced Training Guide | HRS_HighRoad Solution | | day | email | |

Recurring Campaigns

The 'Recurring Campaigns' page displays the next scheduled recurrence for each campaign in the account with an active recurrence. This can be useful if you have several recurrences running simultaneously across different projects.

Home > Admin > Schedules > Recurring campaigns Help topics ADMIN OVERVIEW SCHEDULES

Recurring campaigns

LAUNCHES IMPORTS EXPORTS **RECURRING CAMPAIGNS** PENDING APPROVALS

| ID | Campaign Name | Next Run | Start Date | Stop Date | Frequency |
|-------|---|-------------------|-------------------|-------------------|-----------|
| 13955 | 7 Days Before Expiration | 21 Sep 2021 11:00 | 23 Jul 2020 00:00 | 03 Oct 2021 00:00 | Daily |
| 13954 | 14 Days Before Expiration | 21 Sep 2021 11:00 | 21 Jan 2021 00:00 | 20 Jan 2023 00:00 | Daily |

Pending Approval

The 'Pending Approvals' page displays all of the current open approval requests in the account. You can click the campaign name to be directed to that particular campaign's overview, from which you can view more information via the 'Approval Settings'.

Home > Admin > Schedules > Pending approvals

Pending approvals

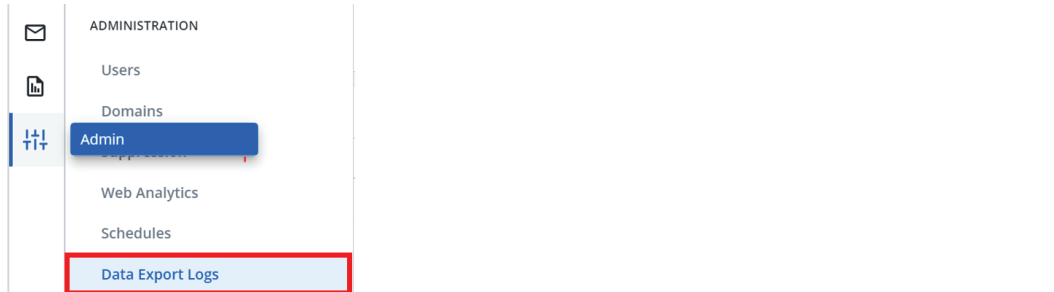
LAUNCHES IMPORTS EXPORTS RECURRING CAMPAIGNS **PENDING APPROVALS**

| ID | Campaign Name | Date Requested | Owner |
|-------|--------------------------------|-------------------|--------------|
| 84102 | Testing | 05 May 2020 13:25 | Emily Wilson |
| 64951 | EM_EM_10142019 | 22 Oct 2019 16:45 | Adam Higgins |
| 84102 | Testing | 05 May 2020 13:25 | Emily Wilson |



DATA EXPORT LOGS

Adestra logs any data exports associated with your association's account/workspaces, and as the Admin you can access these records in the 'Data Export Logs' page of the 'Admin' section.



The data export logs provide details on each export, including the user, the date and time, IP address, and how many records were exported, which can help you keep track of what happens with your data.

| ID | Date Exported | User name | Count Exported | Workspace |
|---------|-------------------|------------------|----------------|---|
| 1383127 | 02 Sep 2021 13:53 | HighRoad Trainer | 1 | HighRoad Solution Demo and Training Workspace |

You can click on each export date to view more information about that export.

← Data Export Log

Erika Beshore (ebeshore) exported 1401 record(s) on 29 Jul 2021 13:47, more information on this particular data export can be seen below.

| | |
|-----------------|---------------------------------------|
| ID | 1370169 |
| User ID | 4 |
| Username | ebeshore |
| Workspace ID | 1 |
| Workspace name | HRS_HighRoad Solution |
| Table ID | 92 |
| Table name | HighRoad Solutions Subscriber Table |
| Record count | 1401 |
| Data exported | 29 Jul 2021 13:47 |
| User IP address | |



DKIM

DKIM signing is a type of email authentication that allows senders to sign an email with a particular domain. This is a digital signature which can be validated by recipients, meaning it can be confirmed that the email came from that sender and that it hasn't been modified. It works using a private and public key system, so Adestra will encrypt emails with a private key, and recipients' email servers use a public key to decrypt it, which they look up via DNS.

By default, your campaigns will be signed by the msgfocus.com domain if a custom DKIM has not been configured for the domain.

If you want to sign with an authenticated domain the DNS will need to be configured. If your account uses multiple authenticated domains they will all need the DNS to be configured.

For help on how this can be done, contact HighRoad Solutions Customer Support (support@highroadsolution.com).

When using a custom authenticated domain, and it has been set up correctly, the domain overview will display a message similar to this:

✔ Your DKIM public key record looks okay. Your campaign emails will be DKIM-signed by the adestra-demo.com domain.

If you are using a custom DKIM set up, and if there is a problem with the configuration, the domain overview will flag the issue.

DKIM

❗ There seems to be an issue with the DKIM public key record on your domain. Your campaign messages will be signed by this domain, but recipient DKIM checks will fail.

Your domainkey record, which defines your public DKIM key, should look like this (as one line):

```
adaedhgh._domainkey.adestra-demo.com. IN TXT "g*; k=rza;
p=MIGfMA0GC3qSIB3DQEBAQUAA4GNADCBiQKBgQCWz4oGF8m/IRP0entfaA9D6ACa1E1ZrGvng0wFnac1m
ZdBQy7N1LRpy0Hicw07JgwXqFMR8VoZK1+0s2Hsx/;9qKVJ4Tz2bpFdaC5nLBRWzwVPunTky1kQmXuFU/6
;qqNa/IZxSTn/dDQn95sUvnbRduJOpXhrzmb9;295ge7;74QIDAQAB"
```



DOMAINS

There are two types of domains you may come across when working in Adestra; **authenticated domains** and **delegated domains**.

Delegated Domains

Delegated domains are used within your campaigns for example as the domain in URLs for click tracking, and in automatically generated 'from' and 'reply' addresses.

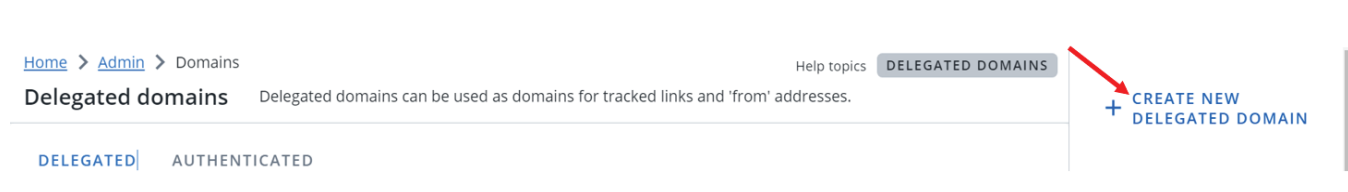
Delegated domains are an opportunity for you to use a custom domain name for use in your campaigns, rather than a generic one Adestra provides.

By delegating your domain to Adestra (it's recommend a sub-domain) allows for hosting your images and gathering reporting data. And you have an opportunity for additional branding throughout your campaigns, as your domain will be used for URLs in images, form actions, click-tracking, etc.

Domain delegation helps your members to identify and verify where the email has come, and can assist with deliverability.

Create Delegated Domain

Navigate to admin and select domains. Once you're on the delegated domains page navigate to right-hand side and click '**CREATE NEW DELEGATED DOMAIN**'



Step 1.

Provide your domain name.

Domain name (required)

Step 2.

Select your workspace; when selecting a workspace this will limit your domain to the workspace selected.

Workspace



Step 3.

You have the option to disable conversion tracking cookies for this domain.

Conversion tracking

Conversion tracking uses cookies that fall under the Privacy and Electronic Communications Regulations.

Disable conversion tracking cookies for this domain

Note: Conversion cookies track behavior and, therefore, fall under the Privacy and Electronic Communications Regulations.

Click 'Save' and you will be directed to the overview for that domain which, if everything has been set up correctly, will display the delegation method for the domain.

| OVERVIEW | | HEADERS |
|-------------------|-----------------------|---------|
| Name | solution.msgfocus.com | |
| Type | Delegated | |
| Delegation method | NS | |
| Tracking cookies | Enabled | |
| Last checked | 25 Oct 2019 08:07 | |

If the domain has been set up incorrectly a warning will be displayed, with advice on how the record should be added to your DNS provider.

← test.com

OVERVIEW

! This domain is not delegated properly. In order to delegate your domain, you need to add the following to your DNS configuration:

test.com. IN CNAME test-com.msgfocus.com.

If your host does not support delegating domains via CNAME, please contact client services for further information.

| | | |
|--------------|--------------|--|
| Name | test.com | |
| Type | Delegated | |
| Last checked | 1 second ago | |

If you require additional help, contact HighRoad Solutions' support team support@highroadsolution.com



Authenticated Domains

Authenticating a domain is required if you want to use a custom **From Address** in your campaigns.

By authenticating the domain with an SPF/Sender-ID record, it verifies that Adestra can send on your Association's behalf. This will enable you to apply some branding to your campaign, outside of its content, as well as aid deliverability by using a specific From Address related to your communications.

Both delegated and authenticated domains require a certain amount of configuration in Adestra and with your own third party DNS provider before they can be utilized within your account.

Domains with an existing SPF/Sender-ID Record

If your Association's domain already has an SPF/Sender-id record assigned to it, you will need to update the record to contain msgfocus.com, otherwise it may cause deliverability problems.

Valid SPF record

For example, a valid SPF record will look similar to this:

```
"v=spf1 ip4:127.0.0.1 -all"
```

[Copy](#)

You will need to add 'include:msgfocus.com', which will alter the record to look similar to this:

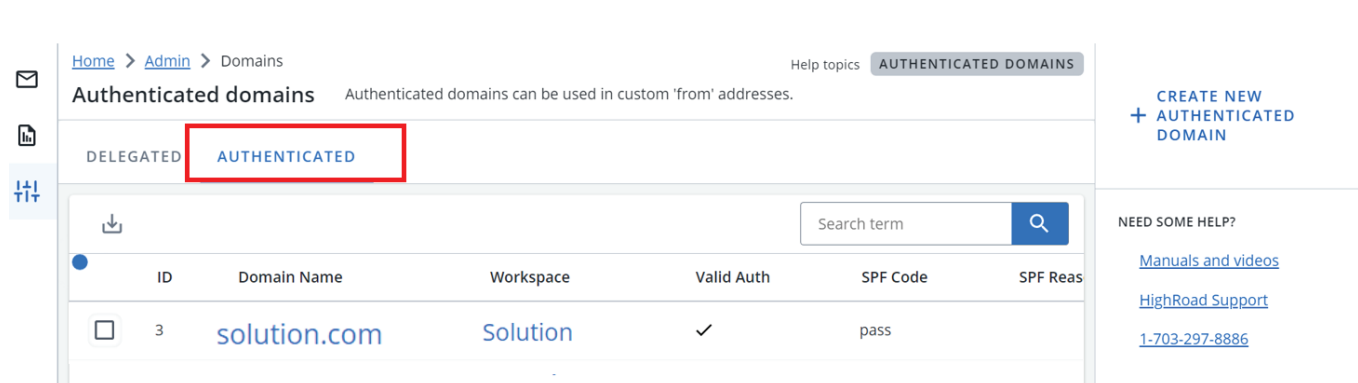
```
"v=spf1 ip4:127.0.0.1 include:msgfocus.com -all"
```

[Copy](#)

Adding Domains

Once you have set up your domain with an SPF/Sender-ID in your DNS provider, you will need to add the domain to the 'Domains' interface of Adestra in order for it to work.

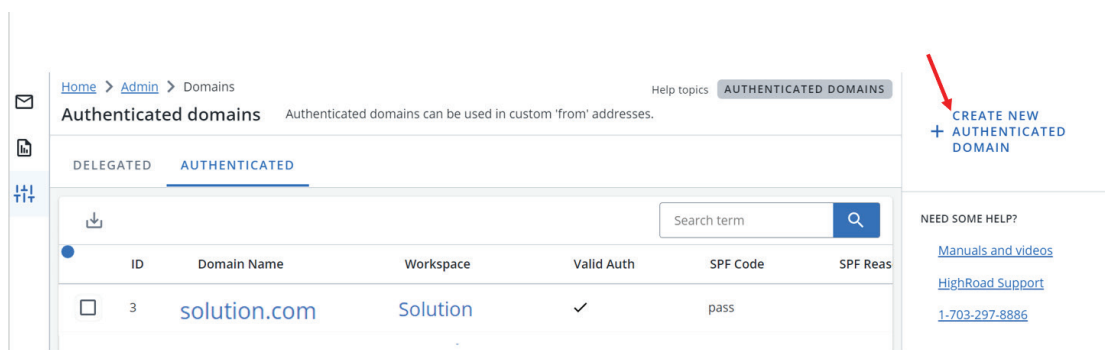
You can access the 'Domains' section of Adestra via the 'Admin' tab, in the header bar at the top of the screen, and then the 'Authenticated' tab.



Any existing delegated domains will be displayed in the domains list, which will indicate if each domain is correctly configured and the last time this was checked. You can click on the domain name to access more information about that particular domain.

Step 1.

Select the 'Create Domain' link in the right-hand sidebar.



Step 2.

Complete the 'Create authenticated domain' page

Domain Name

Domain name (required)



Workspace

Workspace

Limits the domain to one workspace.

Step 3.

Conversion tracking

Using the drop down select your cookie expiration time.

Cookie expiry time (required)

| | |
|---|---------|
| 4 | Weeks ▾ |
| | Hours |
| | Days |
| | Weeks |
| | Months |
| | Years |

Conversion tracking uses cookies that fall under the Privacy and Electronic Communications Regulations.

Once you've selected your expiry time click save.



For any questions,
reach out to HighRoad support at
support@highroadsolution.com.