



# 5 Step Checklist for Launching an Email

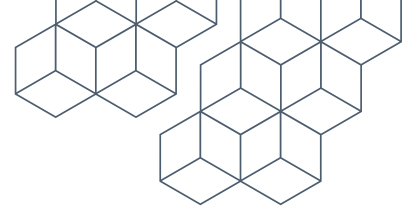
## 1 Set-up:

- Choose the project you want to send the email from. A project in Adestra is a folder of a set of emails and are organized to your organization's specific needs. Once in the project, you will see on the top right the option to create a campaign. A campaign is one individual email in Adestra. From there go ahead and name your campaign. (This name will be for internal purposes only and will not be visible in the sent email.) Notice on this page you can also tag an email. Understanding a tagging taxonomy from your organizations perspective will be helpful here as you begin to assign tags to individual emails, lists, etc. Tagging is useful for reporting later as you can pull reports from various projects, but with the same tag of for example, "webinar". Note: you can come back later and tag at anytime and this step is not necessary.
- The last step on this initial set up page is to choose a preset for your campaign. A preset in Adestra is a shortcut in your workflow process that allows you to auto-fill in all of the from name, from address, reply name, reply address, footer, etc. in the email. These are set up on the front-end of configuration of your Adestra workspace, so that you can choose them on the go as you begin to build and send emails. An organization may have one preset for each instance they have a differing footer, URL, or reply name and/or address.
- Once you have assigned a name and chosen a preset, hit save. The next page is the summary of the pre-configured preset you chose. You can review the settings to make sure all is right and this is the page you will insert your subject line for the message. (Note: On the subject line, you have the option to include a personalization tag.)

## 2 Choosing a template and your template library:

- Now that you are in the editing mode, you will be prompted to "Create HTML Content". You will want to click this button and then choose the button to "Select Template" in the top left area. That will pull up your template library that will show a thumbnail of your available templates and/or your one Master Template. Once you have chosen your template, the next step is to click the "Email Editor" button. This opens a new window from which you will make all your email edits (and might be familiar to you from a legacy email platform and/or a webpage editor.)





- 📦 In the email editor window, you will see a sparse view of your master template. You will need to build it out to your needs. To do this, click on a content box so that it is highlighted in bold blue. Then click on the arrow pointing up to show the menu/drop down of content boxes/components to choose from in your Master template. This is by design, so that you have most or all of the content boxes you could need to build out the message as you need. (Note: You will have the option to build out your template one time and then clone that version of the message for emails that tend to have the same components.)

### 3 Working with your template: the three main components of your template

#### 📦 Images:

- i Working with images in your template is as easy as clicking into that component and pulling up your file manager. The template is designed so that you have a default image with the actual specs of that image to show what size image you should pull in. (Note: Email templates are typically 600 pixels wide at full width.)
- ii Also built into the platform is the ability to crop and/or resize an image if you choose to edit your images all inside the email editor.

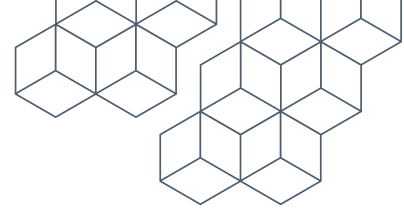
#### 📦 Article titles & article body copy:

- i 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. You can hyperlink text, include bullets, and personalization. Note, it is not recommended to insert an image inside of a text area as it is not fully tested across all email clients.
- ii Personalization in a text area is found by clicking on the “Email Tools” drop down menu and choosing “Personalization”. There you will choose your core table and then the field you are wanting to bring in. For example, the first name field will populate with the contacts first name. A default value can be inserted as well in case the field is empty.
- iii Note: 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.





#### 📦 Call-to-action button

- i In your master template, we insert CTAs into each of the components. Each CTA is designed so that all you have to do is edit the text and insert a link, but the ability to design the text size, etc. is there for you too. You also have the option to modify the placement of the CTA from Left, to center, to right, and finally to hide it all together.

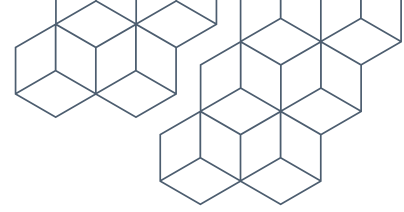





## 4 Data & Lists

-  Before you will be able to do any sort of testing of your campaign, you will need to assign your campaign a list. You can bring in data through an import or assign a list via the data you have coming over in your integration. Or you can create a dynamic list either under the data tab or within a campaign.
-  **Import:** Head over to the data tab of your workspace. Choose “Create new list” available in the top right area of your workspace. Name your list. Choose your core table. Hit Save and proceed. Next, tab over two tabs to Import. Then, select a CSV file from your computer to input (with a header row). Choosing a data source (your organization) is a way to tell the system that you sign off on this data. Choose Next. On the next page you will map your fields on the left with the fields in your core table on the right. Choose next and the data will be imported. You can also browse the imported data on the browse tab once the data is imported.
-  **Dynamic List:** Head over to the data tab. Choose to “Create a new dynamic list” seen in the top right area of your workspace. Name your list and choose your core table, choose save and proceed. On this next page is where you can include and exclude multiple lists all from one page. Also on this page is the option to apply a filter (that you have already created in another area of the workspace). A filter can be applied to a larger list to filter in the folks you desire based on a field value, behavior like clicks, etc. Once you’ve inserted you multiple lists, you can choose to update the list to get the final count of the dynamic list. When you go to create a campaign, that needs to be a combination of multiple lists, you will choose this one dynamic list with all of the criteria already included.
-  **Dedicated Dynamic List:** If you have a dynamic list you want to create that you will only use once, you can create the same dynamic list as above, but inside of the campaign/email you are working in. This is so the list will not save in your workspace. It is more for a one-off use. To create a dedicated dynamic list, head into the campaign you are working in. Then under where it says to “Select a list” choose the link under the Select a list button that says “Create dedicated dynamic list”. Clicking that link will take you to the page where you can include and exclude multiple lists and/or apply a filter.





## 5 Testing & Launching

-  Once you have produced your email and applied a list, it is time to test and launch. There are four steps to testing and launching.
- i** Step 1: The first step is a spam check. Here you will get an itemized list of potential red flags that are being picked up in your email that would determine your email being picked up by spam.
  - ii** Step 2: The second step is checking the 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.)
  - iii** Step 3: The third step is the actual testing step. Here 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 use entirely. Note, that under the Personalization on this page, you can also choose to masquerade as a contact on your list. In an instance where you have personalization OR conditional content (dynamic content), you may want to test as a specific person on your list to determine the personalization or conditional content is working properly.
  - iv** Step 4: The last step of the process is the actual launching step. Here you can choose a specified time in the future to schedule the campaign to go out. You can also choose to automatically resend the campaign to non-openers of the original send at a specified number of days from when the first send launched. Note: that on reporting, there will be two separate line items for each send. You will also see the original send on the content calendar AND the resend of the original on the content calendar. Last, if you were to cancel the original send, you STILL need to cancel the resend also.

