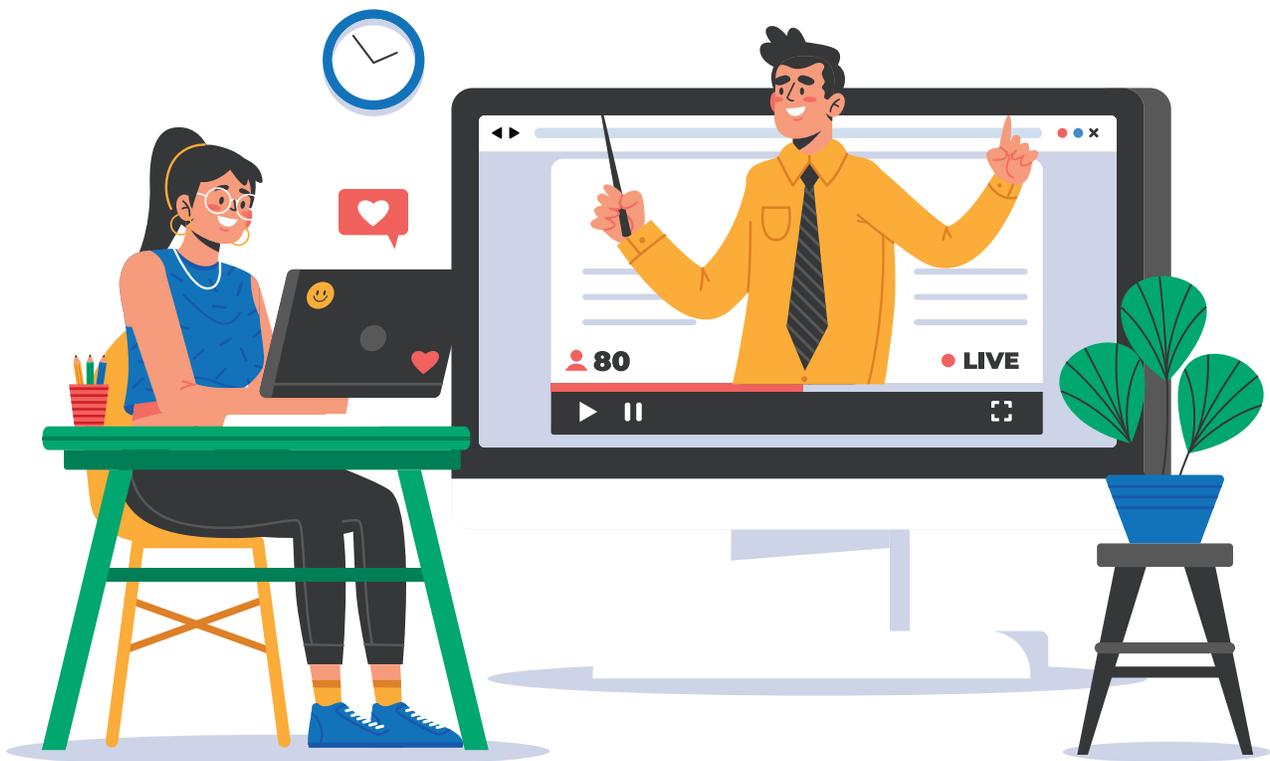
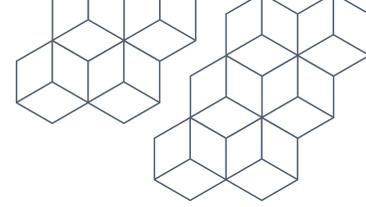


Adestra Advanced Training Handbook



In the Advanced Adestra training you will embark on how to query your data with filters, how to create dedicated dynamic lists for individual email campaigns, form creation, and the steps for automation. You'll walk away with understanding of more complex areas in which you can leverage the platform for greater efficiencies and success.



Index

Filters

- 📦 What is a filter?
- 📦 How to create a filter?

Dedicated Dynamic Lists

- 📦 What is a dedicated dynamic list?
- 📦 How to create a dedicated dynamic list?

Conditional Content

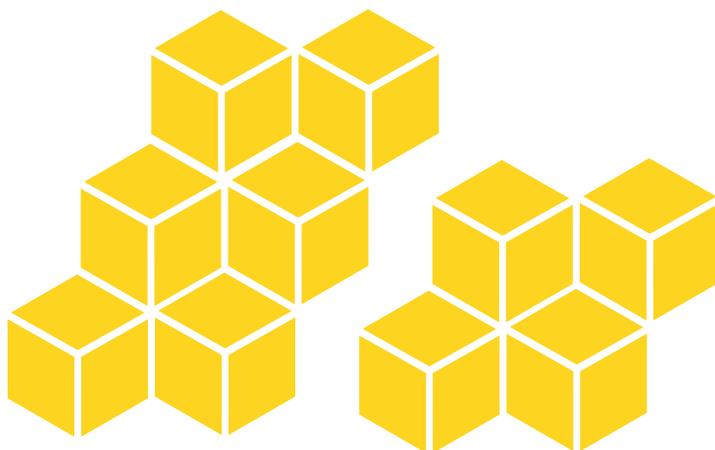
- 📦 What is conditional content?
- 📦 How to create conditional content?

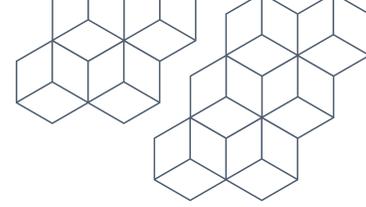
Automation

- 📦 What is automation?
- 📦 How to create an automation program?

Forms

- 📦 What is a form?
- 📦 How to setup a form?





Section 1: Filters

Filters

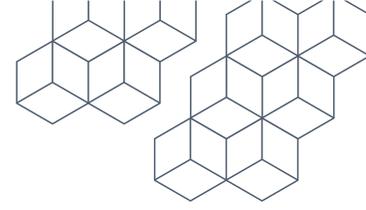
Filters are a set of rules to identify a portion of your Association's data within Adestra, based on your member contact records, behavior or previous sends. Filters allow you to parse out your data using logic.

Saved

A saved filter is made for repeated use - to be applied to any item that is filterable.

Dedicated

Unlike Saved filters, Dedicated filters are created within a campaign and may only be used for that campaign.



Exercise 1: Creating a filter

1. Navigate to data > filters > navigate to the right-hand navigation and click
2. Create saved filter
 - a. Setup a filter | Settings
 - b. Provide your filter with a name (name your filter using the following)
 - c. Your Initials | Assoc. acronym | Test Filter
 - d. Provide a description (this is optional)
 - e. Tags (this is optional)
 - f. Select Owner (this will default to your user account)
 - g. Select your core table
 - h. Click Save
3. Filter editor canvas
 - a. Click on New Rule | If you are looking to OR FILTER click the arrow to the right of your filter; if you are looking to do AND FILTER click the arrow below your filter
 - b. Navigate to the control panel on the right-hand side;
 - i. Choose your rule category > select 'field text match'
 - ii. Select your rule type > select 'field contains'
 - iii. The required information will differ based on your rules
 - iv. Click ok
 - v. Select your field contains > field > select state > click ok
 - vi. Match text type in the text box > VA
 - vii. Click Ok
 - viii. Click Save Filter



- HighRoad Solutions™
- HRS_HighRoad Solution
- DATA
- Lists
- Filters
- Core Tables
- Data Tables
- Unsubscribe Lists
- Export Manager
- Source
- Remote Connection

Example Filter

< Back to filters

Overview Settings

Name	Example Filter
Owner	Emily Wilson
Permissions	This workspace
Table	HighRoad Solutions Subscriber Table Browse table with filter

Field equals

Negate rule

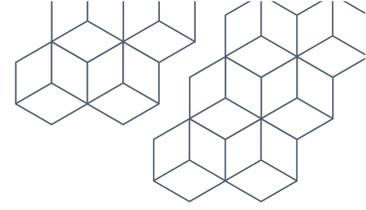
Field:

Match text:

Save Filter



Questions/Answers



Section 2: Dedicated Dynamic Lists

Dedicated dynamic list

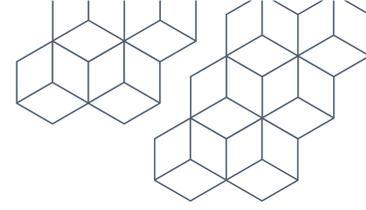
A dedicated dynamic list is used with a specific campaign.



Exercise 1: Create a dedicated dynamic list

1. Navigate to the right-hand side and click 'Create a dedicated dynamic list'.
2. Settings
 - a. List name (this will auto fill based on your campaign)
 - b. You can choose to tag your list for easier searching later.
 - c. Select your core table
 - d. Updating
 - e. (Choose between 'Scheduled updates' and 'Automatic updates')
 - f. Navigate down to bottom of the page and click save
3. (your page will refresh, and you will be taken to the overview page)
 - a. Include Lists
 - b. Select your included list(s)
 - c. Exclude Lists
 - d. Select your excluded list(s)
 - e. Add filter (if using a filter)
4. Your dynamic list(s) will update based on your update option in step 4.

The screenshot displays the upland Aestra email editor. The main workspace shows a preview of an email with the 'Association' logo and headers. On the right-hand side, the 'Mailing List' section is visible, with the 'Create dedicated dynamic list' option highlighted by a red box. The interface includes a left sidebar with navigation options like Overview, Options, Data, HTML, Launches, Settings, and Permissions. The top navigation bar shows the user is in the 'EWN | HRS | Training' workspace.



Section 3: Conditional Content

Conditional Content

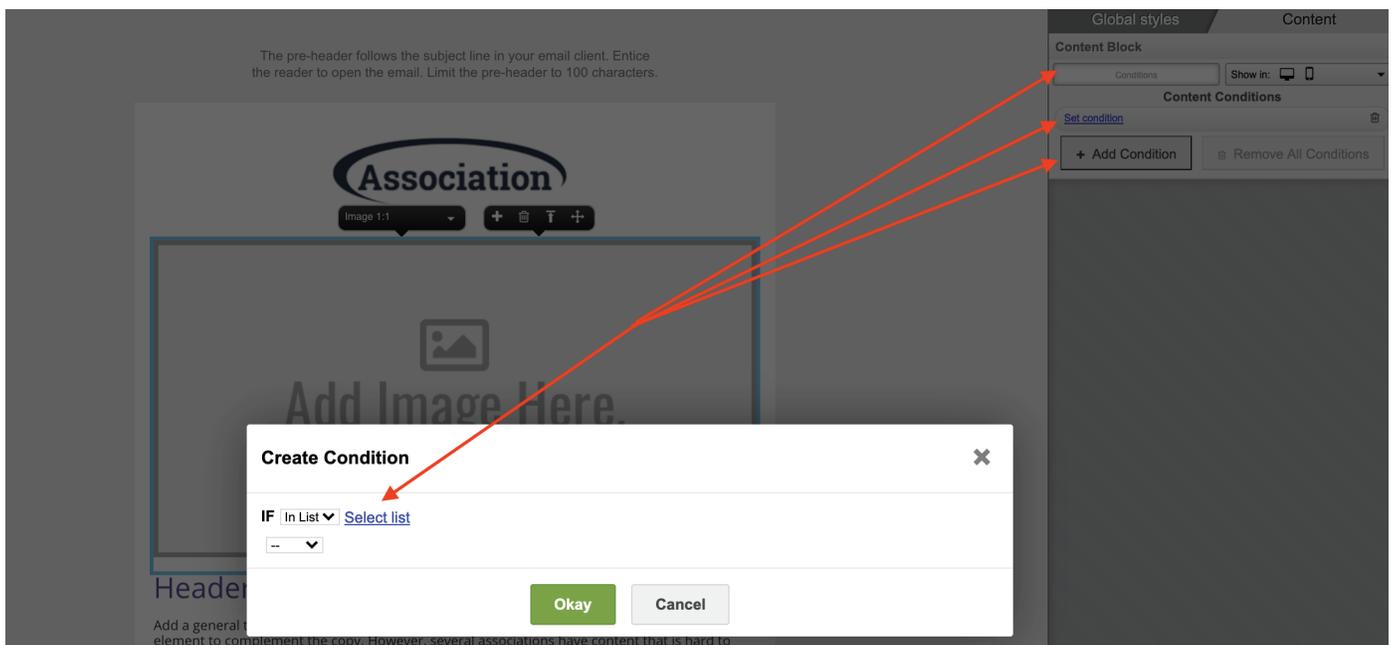
Conditional content (also known as Dynamic Content), allows you to alter the email content of your campaigns based on a condition that affects or uses the information you have stored about your contacts. This allows you to tailor your campaigns for each member - as certain parts can be displayed or hidden based on the conditions matched - providing the opportunity for greater engagement and higher conversions. Conditional content eliminates the need for you to create more than one campaign.

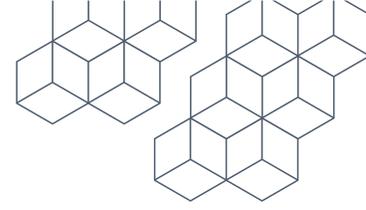


Exercise 1: Add conditional content

1. Click 'Conditions' in your content module
 - a. Click add condition
 - b. Click on set condition
 - c. Choose your list for 'if' (If you need to add more than one list, choose 'if' or 'and' within the drop down; select your list.)
2. Click save
3. Add additional conditions

*Repeat the above steps





Section 4: Email Automation

Email Automation Components



Segments

Identify your target audience based on their demographics, interests, behaviors, etc.



Content

Build and map your content themes to meet your key objectives and values.



Assets

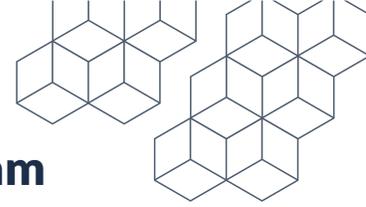
Identify the formats of your assets and where they're going to fall in the workflow.



Workflows

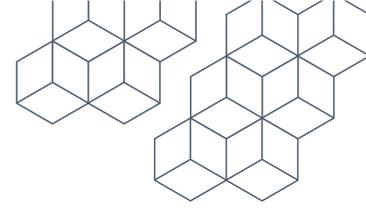
Bring all the pieces together into the platform and hit go.





Exercise 1: How to Create an Automation Program

1. Build a campaign for automation. (Same process as creating a campaign with only a few additional steps.)
2. Assign a list to your campaign: you can choose a test list.
3. Test your campaign(s)
4. Click Test and launch campaign
5. Click Publish campaign
 - a. On the 4th stage page of test and launch
 - b. Tab over to publish only
 - c. On the publish page click publish campaign
6. Navigate to automation [located under campaigns on left-hand nav]
7. Click 'create new program' on the right-hand side
 - a. Program settings
 - i. Give program a name
 - ii. Owner (will default as the signed in user)
 - iii. Choose your process
 - iv. Select core table
 - v. Click save
8. Navigate to automation [located under campaigns on left-hand nav]
9. Click 'create new program' on the right-hand side
 - a. Program settings
 - i. Give program a name
 - ii. Owner (will default as the signed in user)
 - iii. Choose your process
 - iv. Select core table
 - v. Click save
10. Stages
 - a. Launches
 - b. Delays
 - c. Wait
 - d. Wait until
11. Select your Lists
12. Publish program
13. Click to activate



Section 5: Forms

Types of Forms

Static

Static forms are forms you can host on your website.

Pre-filled

Pre-fill forms are used within a campaign.

Bespoke

You will need prior knowledge of HTML coding to use the bespoke forms option. You will be loading in the HTML and can embed the form from there. There is more documentation on creating bespoke forms in the [Adestra documentation](#).

Form Set-up Terms

Form Title

The title you enter will typically be displayed at the top of your form, although this depends on your template.

Form Logo

You have the option to upload a logo to be displayed within your form. Select 'Include a logo' and the screen will expand to display more options. Although the placement will depend on the selected template, you will need to ensure the logo you are uploading is the correct size.

If images do not show the alternative text will be displayed.

Logo Target URL

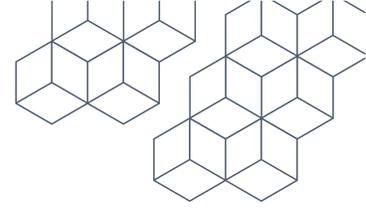
You can enter an optional target URL, to open when users click on your logo within the form.

CSS/Javascript

If you wish to customize your form, you can insert raw CSS or Javascript styling here.

Thank you, page

As part of the form creation, you can define what you would like to display to the user after the form has been submitted. The options include redirecting the user to a URL containing your thank you page or to display thank you text once the form is submitted. Some thank you text is provided by default but you can change this by clicking in the text box and editing the text.



Form Elements

There are three different types of element, and they are categorized in the sidebar shown to the right:

Static

Do not require input from a user

Basic

Trigger data transfer back to the platform

Advanced

Features that provide functions within the form

Heading

Adding a header element to your forms allows you to insert a title that will display on your form. This is a static element and doesn't require any input from anyone using the form.

You will need to provide a Label, Header text and class.

Element settings:

On this page there are two required fields, label and heading text. The label doesn't display on your form. The heading text is another required field; this is a default value for your heading element and only applies when using a static form.

Text box:

Text boxes are basic elements and will create a field in which the recipient can enter text. I.E. Firstname

Text area

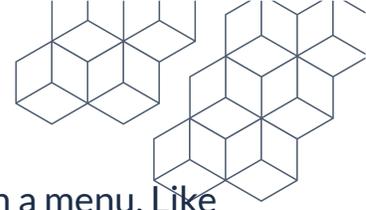
A text area is a basic element. It will create a field in which recipients can enter text but, unlike text boxes, the text area allows for multiple lines.

Checkbox

A checkbox is a basic element. It is a singular tick-box that can be checked or unchecked on your form. Each checkbox is an individual checkbox if you are wanting to add more than one checkbox you will need to repeat the creation process.

Radio

Radio selection is a basic element. It allows you to create a list of radio buttons, so only one of the options can be selected.



Select

Select, a basic element, allows you to create a list of options to appear in a menu. Like radio buttons, only one of the options can be selected.

Validation

Is an option for you to apply validation to your inputs. This allows you to force your form user to provide an answer and specify criteria that must be met. If the criteria isn't met the recipient will receive a custom error message that you add.

There are different types of validation available and depending on the element selected you can apply the validation when the element is created or later in the element settings. If you choose email and CAPTCHA. These particular elements have validation applied.

Force checked

Force checked forces recipients to check the element before submitting. This is typically used for terms and conditions

Force value

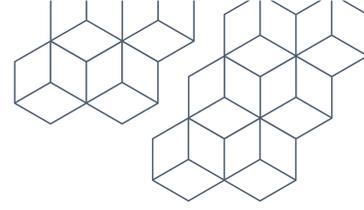
This forces your recipients to provide values to elements. Commonly used for date of birth, date picker

Validation rule

A validation rule has two different forms of complexity. It allows you to simply force a value or provide a regular expression so that the value meets a certain criteria.

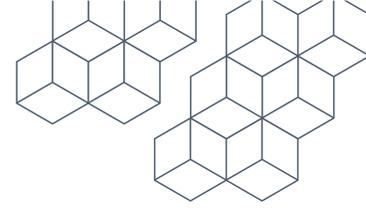
Not empty: The form field must contain a value of some kind in order for the form to be submitted.

Advanced: This option allows you to define a type of value required in the field from the user, such as particular characters or words, using a regular expression



Exercise 1: How to Create a Form

1. Navigate to the campaign icon and in the sub-nav scroll down to Forms which will open the form settings page.
2. Settings:
 - a. Provide your form a Name (required)
 - b. Description giving your form a description can help you identify the purpose of the form.
 - c. Choose your core table
 - d. Select template
 - e. Choose your form URL. (When checking the box for secure 'https' will only work for domains with SSL certificates available.)
4. Content Settings
 - a. Give your form a title.
 - b. Depending on your template will determine if your title will display at the top of your form
5. CSS [Custom CSS can be included within your form template]
6. Complete the thank you page
7. Specify what to display after your form is submitted
 - a. Redirect or Display
8. Click Save. (Once your settings are saved you will be redirected to your form's overview, you can edit settings later if you need.)



HighRoad Solutions
HRS_HighRoad Solution

IN THIS WORKSPACE

- Overview
- All Campaigns
- Automation
- Boilerplates
- Templates
- Forms**
- Captures
- Report
- Settings
- Permissions
- Features
- Presets
- Bespoke Forms
- Calendar

Create form

[Back to form definitions](#)

Form settings

Form name (required)

This should be unique. It will be visible to your customers in the browser address bar.

Description

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

Core Table (required)

The table you would like to associate your form and its data with.

Apply this form template (required)

Domain for form URLs (required)

Use secure "https" URLs when generating links to forms.
This will only work correctly for domains with suitable SSL certificates available.

Tags

Content settings

Title

Your form will typically display this at the top.

Include a logo within the form

CSS

Custom CSS to include within your form template.

Javascript

Custom Javascript to include within your form template.

<head> Content

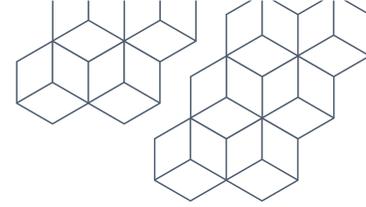
Additional html to include within the tags on your page. This can include scripts, links to external style sheets, meta information and more.

Thank you page

Thank you page
Specify what to display after your form has been submitted.

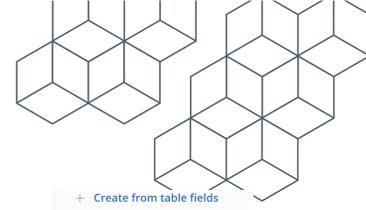
- Redirect to your own thank you page URL
- Display thank you text in your template

Thank you text (required)



Exercise 2: How to Add Elements

1. Navigate over to 'Add Static Form Elements' [right side nav bar]
 - a. Choose the heading element
 - i. Fill in the label
 - ii. Add your heading text (only if you are creating a static form)
 - b. Click on Subheading (if your form requires a subheading)
 - i. Fill in the label
 - ii. Add your heading text (only if you are creating a static form)
 - c. Choose 'Text Block'
 - i. Add your text; this will display on your form
2. Click Save
3. Adding basic elements: Navigate over to 'Add Input Form Elements' [right side nav bar; each element will have an element validation]
 - a. Choose an elements
 - b. Set your input validation
 - c. Force checked
 - d. Force value
 - e. Validation rule
4. Adding advanced elements: Navigate over to 'Add Advanced Elements' [right side nav bar; each element will have an element validation]
 - a. Choose an element
 - b. Select your validation
 - c. Force checked
 - d. Force value
 - e. Validation rule



HRS_HighRoad Solution

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Example Form

[Back to form definitions](#)

- Overview**
- Settings
- Actions
- Preview

ID	343	
Name	Example Form	
Static form URL	(Static forms require an email element.)	
Prefilled form code	[*form. Link_url(343)*] (use in campaigns for preference centres/prefilled forms)	
Thank you text	Thank you. Your details have been successfully submitted to our database.	
Template	Master Template Rollout	
Table	HighRoad Solutions Subscriber Table	

Form Elements

This form has no elements, you can use the buttons in the sidebar to add new elements

- + **Create from table fields**
Generates form fields based on your core or data table fields.
- Copy form**
- × **Delete form**

ADD STATIC FORM ELEMENTS

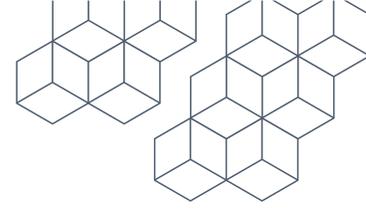
- + **Heading**
- + **Subheading**
- + **Text block**
- + **HTML block**
- + **Submit button**

ADD INPUT FORM ELEMENTS

- + **Text box**
- + **Text area**
- + **Checkbox**
- + **Radio**
- + **Select**
- + **Hidden**
- + **Email**
- + **Date of birth**
- + **Timestamp**

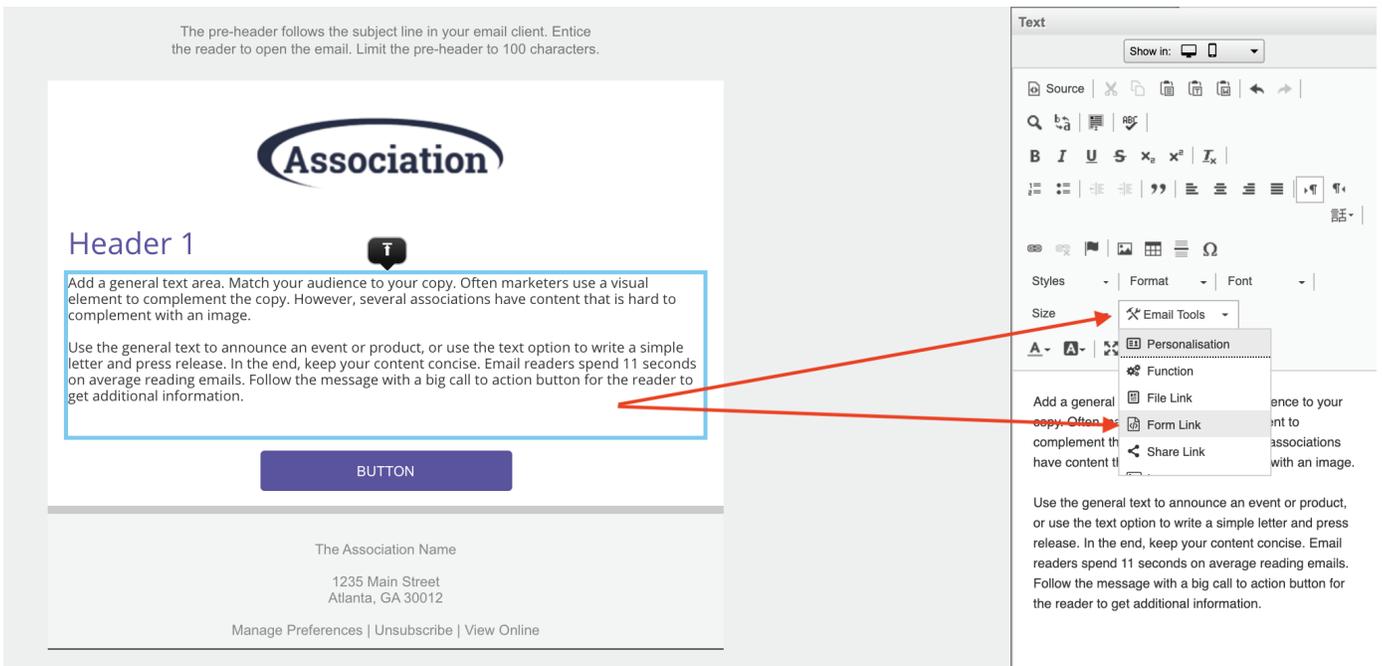
ADD ADVANCED ELEMENTS

- + **List checkbox**
Checkbox to add or remove contacts from a list.
- + **Unsub checkbox**
Checkbox to add or remove contacts from an unsub list.



Exercise 3: Using Forms

1. Click the email tools icon (using the form link option, any members using the form will have relevant data pre-filled).
2. Select 'Form Link'
 - a. A pop-up will display the available forms for you to place in your campaign.- Form links are available for use in the following template modules;
 - i. Textline;
 - ii. Text Box;
 - iii. HTML Box; and
 - iv. Link URL.



The pre-header follows the subject line in your email client. Entice the reader to open the email. Limit the pre-header to 100 characters.

Association

Header 1

Add a general text area. Match your audience to your copy. Often marketers use a visual element to complement the copy. However, several associations have content that is hard to complement with an image.

Use the general text to announce an event or product, or use the text option to write a simple letter and press release. In the end, keep your content concise. Email readers spend 11 seconds on average reading emails. Follow the message with a big call to action button for the reader to get additional information.

BUTTON

The Association Name
1235 Main Street
Atlanta, GA 30012

[Manage Preferences](#) | [Unsubscribe](#) | [View Online](#)

Text

Show in:  

Source |  |  |  | 

Q |  | 

B | **I** | **U** | **S** |  |  | 

 |  |  |  |  |  |  |  | 

Styles | Format | Font

Size |  Email Tools

 Personalisation

 Function

Add a general copy. Often complement the have content ti

 File Link |  Form Link |  Share Link

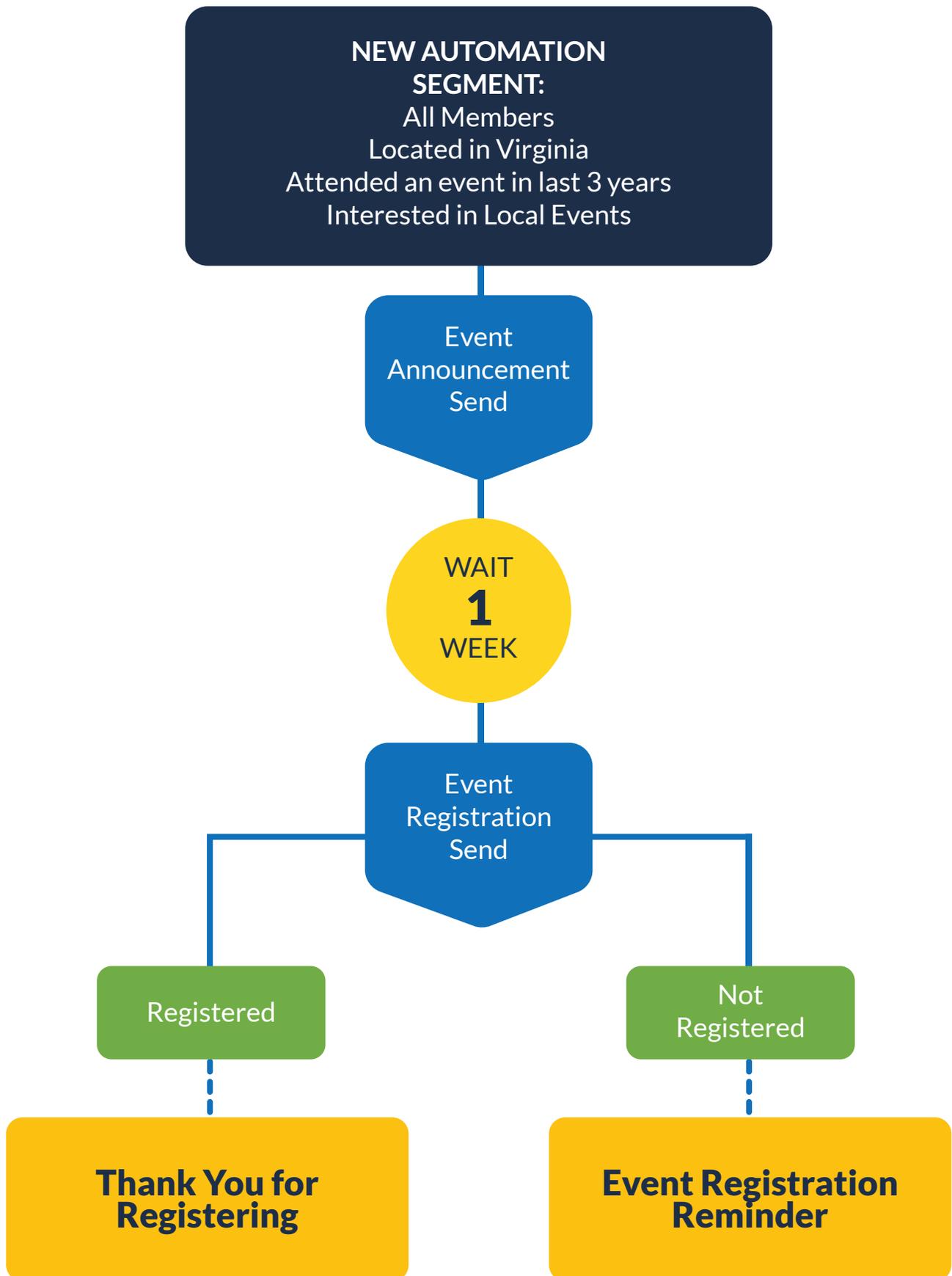
Use the general text to announce an event or product, or use the text option to write a simple letter and press release. In the end, keep your content concise. Email readers spend 11 seconds on average reading emails. Follow the message with a big call to action button for the reader to get additional information.

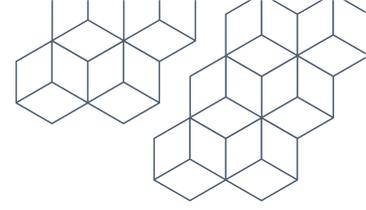


Questions/Answers



Event Registration Automation Example





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

