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How-to-Guide
Transactional Messages

Commercial email messages are governed by CAN-SPAM law that organizations are obligated to adhere to for their email marketing programming. However, as part of your business relationship to your members and constituents, there are transactional email notifications that need to go out regardless of explicit unsubscribes. For these, we consult the Federal Trade Commission's guidelines on the topic and list out use cases specific to associations. This is a helpful guide to consult when identifying whether an email is commercial versus transactional. Additionally, we include specific instructions for how you will manage transactional emails inside of the Adestra MessageFocus email platform.

What qualifies an email as transactional?

- The email contains confirmation of a commercial transaction
- The email contains warranty, recall, safety, or security information
- The email contains change in terms or features or account balance information regarding a membership or other ongoing commercial relationship
- The email contains employment relationship information or employee benefits information
- The email delivers on a good or service as part of a transaction that the recipient has already agreed to

* The primary purpose of the message determines if the email is commercial or transactional; if the message contains both types of content.
Source: ftc.gov

Example Use Cases:

- Dues renewal communications where the primary purpose is to collect on the account balance to keep membership going
- Event or product invoice information
- Notification on membership (i.e. cancellation, information on benefit changes, etc.)

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⬤ How do I accomplish this in Adestra?

Create a Transactional Unsubscribe List

1. Navigate to Data
2. Navigate to subnavigation "Unsubscribe Lists"
3. Choose "Create new unsubsribe list"
4. Name the list "Transactional Unsubscribes"
5. Save

Create a Transactional Preset

1. Under main navigation "Campaigns" choose the subnavigation "Presets"
2. Choose "Create new preset"
3. Name the preset "Transactional Preset"
4. Follow the steps for setting up a preset outlined in the Adestra Roadwork resource page
5. Under "Preset unsubscribe handling", choose "Forced Value" and choose your Transactinoal Unsubscribes list from the drop down

Create a Transactional Campaign/Email

1. Navigate to your project folder and choose "Create new campaign"
2. Give the campaign a name
3. Apply campaign preset and choose "Transactional Preset"
4. Test & launch campaign
5. Review reporting & navigate to your "Transactional Unsubscribes" list. If the list count is greater than zero, tab to "Browse" and empty the lsit.