ETELLIGENT

Advanced Email Marketing

joined-up
digital...
ready to go!

Email marketing remains one of the most important tools available to digital marketers today, providing a cost-effective technique to reach prospects and customers with relevant, timely communications.

Contents

Introduction

The first guide in this series – Etelligent: Getting Started with Email Marketing – covers how to create a campaign, add an email, edit the email, and then send and view reports.

This guide moves on from the mechanics of email marketing to examine some of the features available within Etelligent that aid greater engagement with audiences.

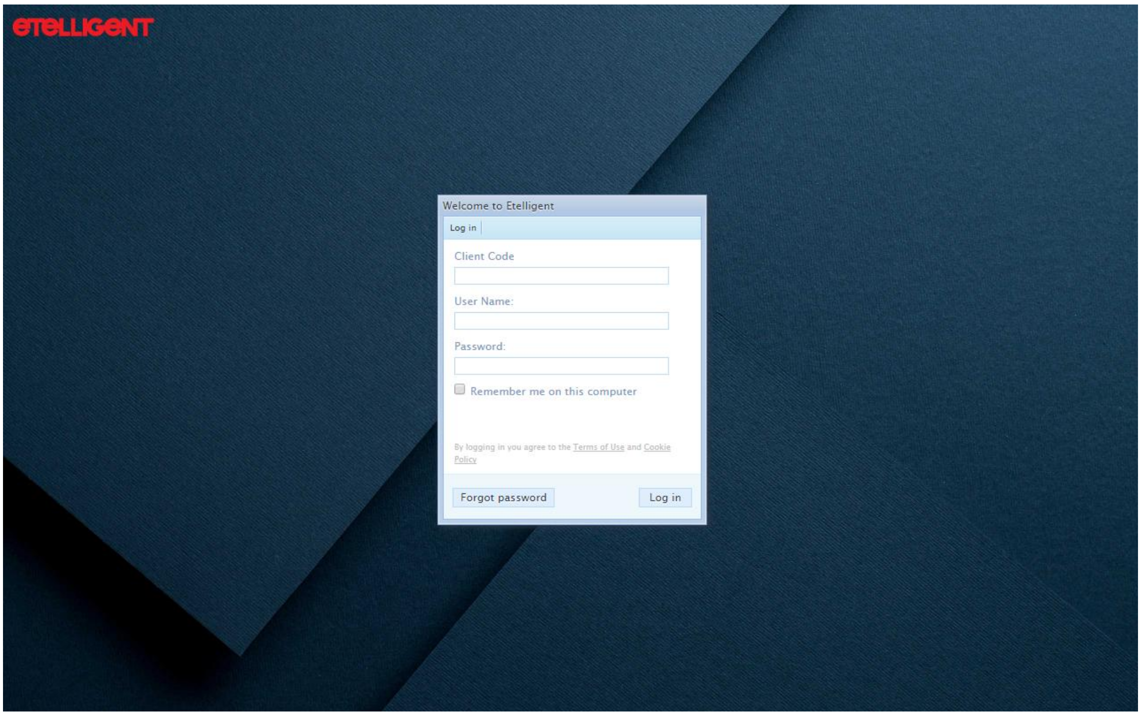
Following a scenario that often occurs near the beginning of a campaign, the first part of this guide will be concerned with the building up of the contact profile; the second will concentrate on how to use that information to send more relevant communications. As the guide progresses, fields will be added to the Contact Profile; Registration sign-up forms created for web sites; Registration alerts triggered; 'thank you' emails automatically sent; 'Update profile' forms added to dynamic web pages; Emails sent to a segment of the mailing lists and finally an email automatically sent on the birthday of each contact. Step-by-step how-to sections will be highlighted and indexed so that the guide can be used as a quick reference.

Log in to the application

Users are required, for security reasons, to log in and out of the application. A remember feature exists to enable users to avoid logging in and out on every occasion. Forgotten passwords can also be reset by selecting the option on the login screen.

Logging in

1. Launch a modern web browser and enter the login URL provided by your support team in the Address Bar.



2. Complete the login details:

   Client code
   The account you wish to log in to

   User name
   The username provided to you

   Password
   The password provided to you

3. Click on the **Log in** button

Logging out

1. Click on the Log out button located at the top right hand corner of the Navigation

Retrieving a forgotten password

1. Navigate to the login screen. Please contact support if you are unaware of the login URL.
2. Click on Forgot your password?
3. Complete the form and click **Send password reminder**
4. An email will be sent to the email address you specified

Click on the link to take you to a form to reset your password

Profiling

> *"I would like to allow visitors to our web site to be able to subscribe online for their newsletters. We don't want to have to manually import these to our email marketing tool. We would like to know when someone has completed the form and it would also be great if the person who completed the form received an email welcoming them. We don't want invalid email addresses cluttering up our mailing lists. We want to make the sign-up process as simple and as quick as possible for the end-user. We want to be able to send relevant communications to our audience."*

In order to be able to segment the contacts based on their properties there is first the need to define what these properties are.

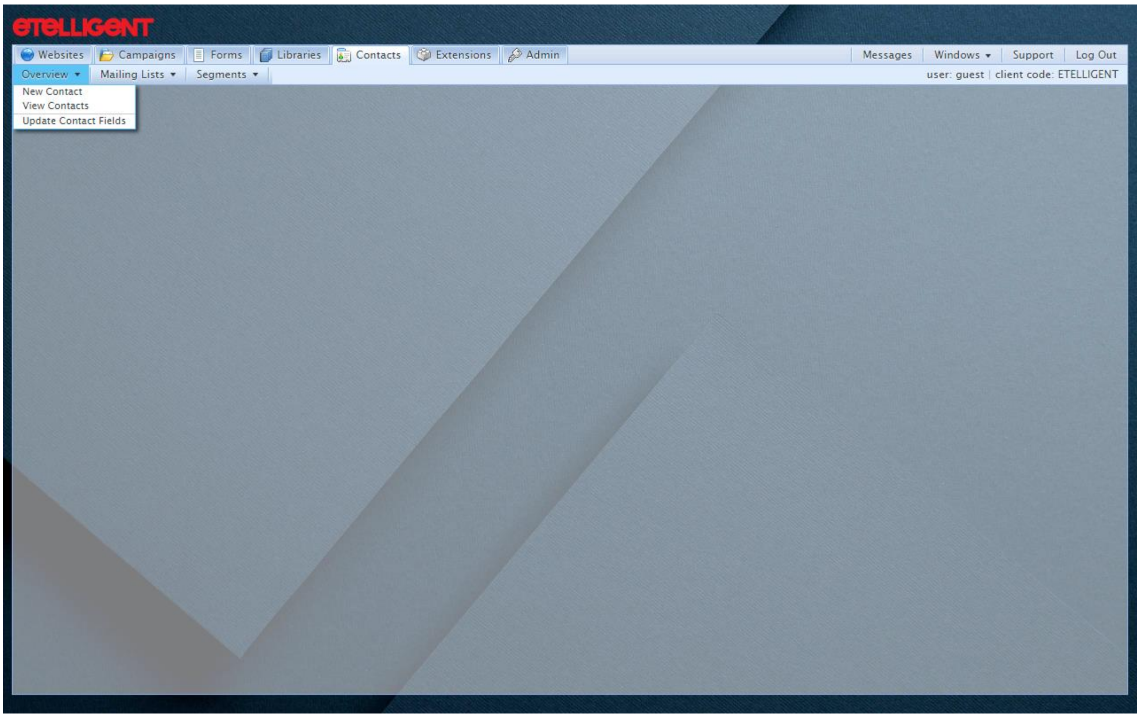
They can range from personal details such as name, address, country through to order reference numbers. Etelligent provides a set of default fields:

- Title
- First Name
- Last Name
- Email
- Mobile
- Country
- Language
- Text Only
- Opt In Email
- Opt In SMS

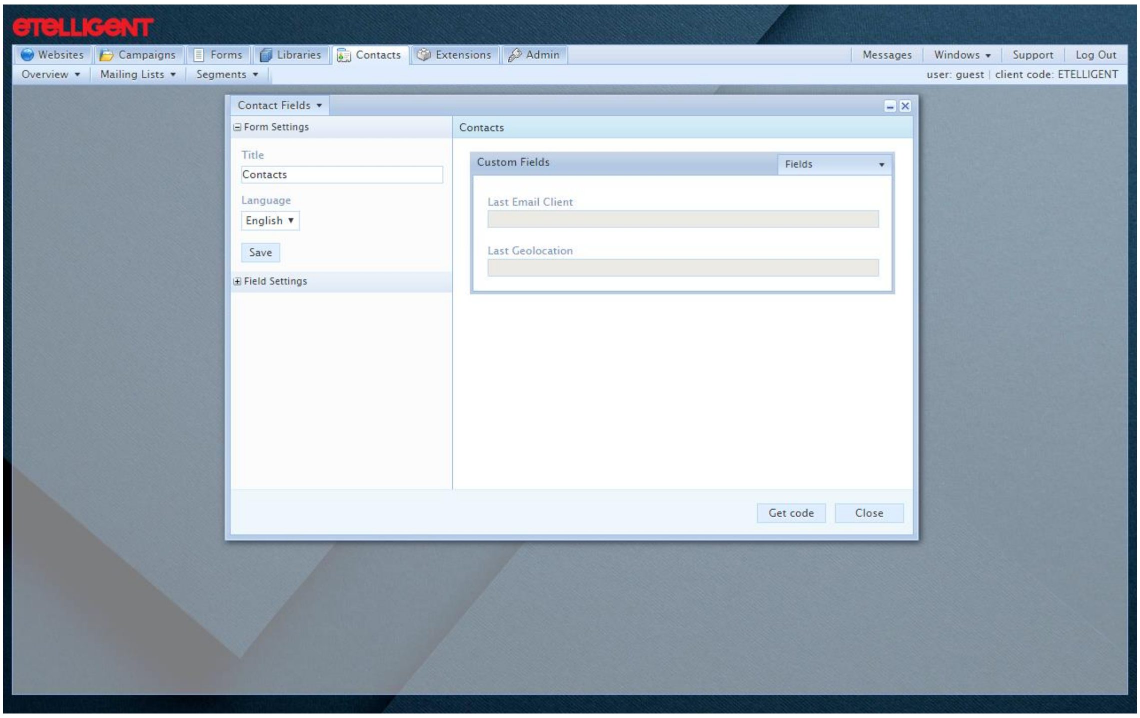
Etelligent also allows Custom Fields to be added. A Custom Field can be used for any purpose. They can be merged into emails or used to segment the set of contacts when sending an email.

Adding a Custom Field

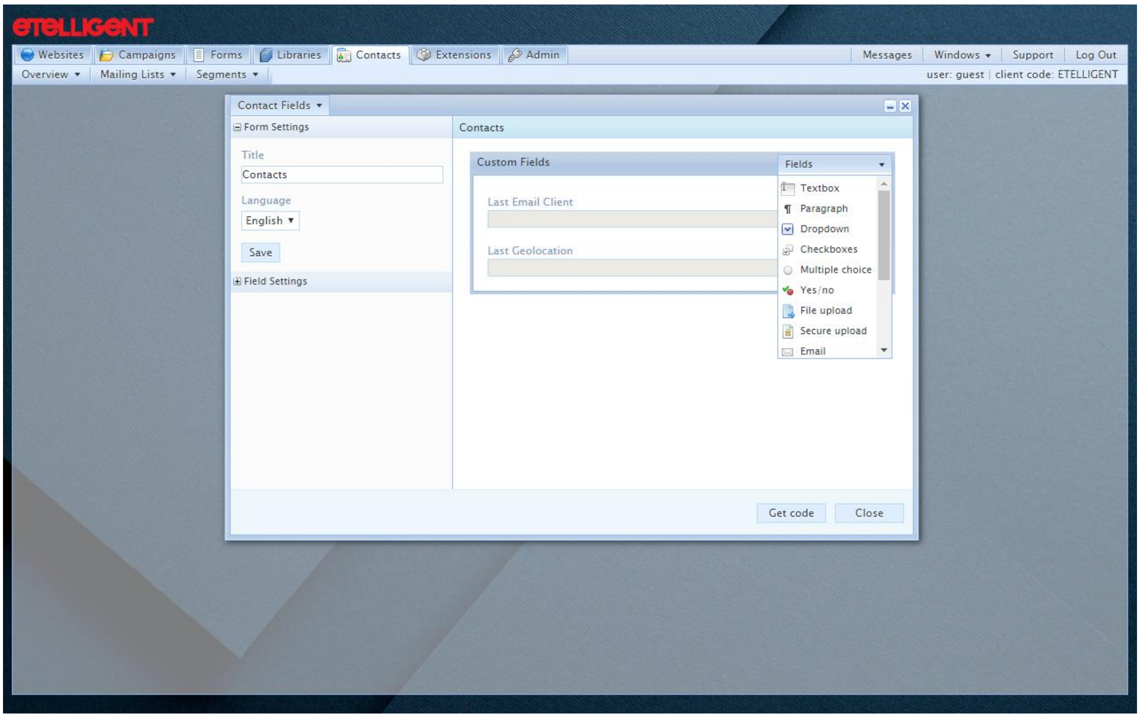
1. Click on the **Contacts** tab
2. Click on **Overview**



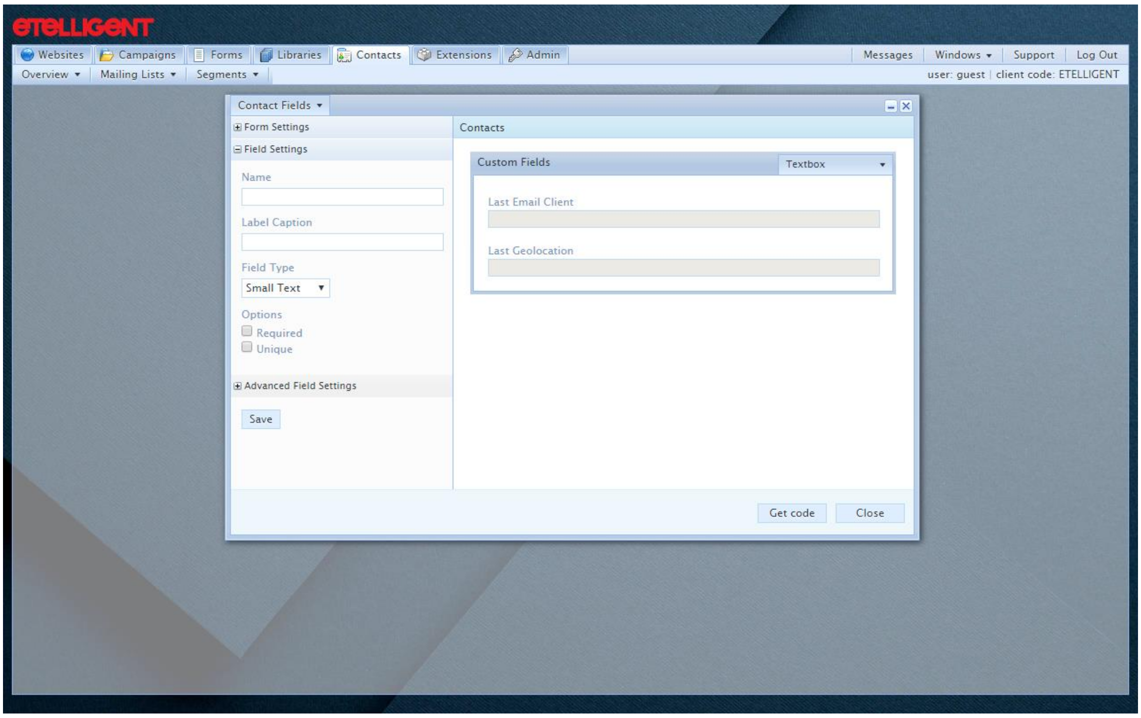
3. Click on **Update Contact Fields**



4. Click on the '**Fields**' drop-down to select the type of input field you wish to add to the form. Input type is what the user will be presented with when entering information e.g. a series of checkboxes or a drop-down list.



5. Complete the Field Settings



Name
The name used in the application to refer to this field

Label Caption
The label that will be displayed beside this field when input is required

Label Description
Additional information about this field that can be displayed, for example, in a tooltip

Options (available under 'Advanced Field Settings')
Required – If selected, this field must have user-input for a successful form submission
Unique – If selected, this field can never be assigned a value that has previously been successfully submitted.

6. Click on Add
7. Click on Close to close the form.

Forms

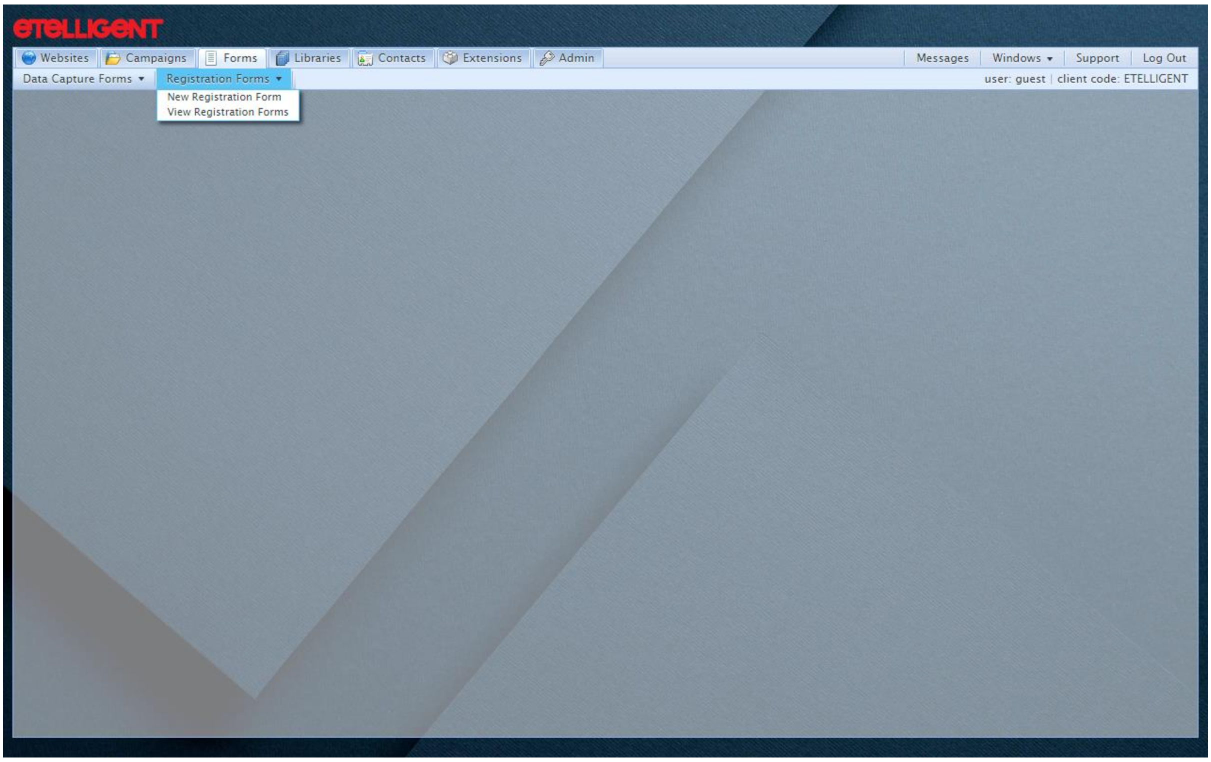
With any additional fields added to the contact profile, the next step would be to create a mechanism for populating these details.

Registration forms within Etelligent can be used to capture new contacts and also to allow contacts to update their profiles. A profile is simply the details (fields) in the database associated with a contact.

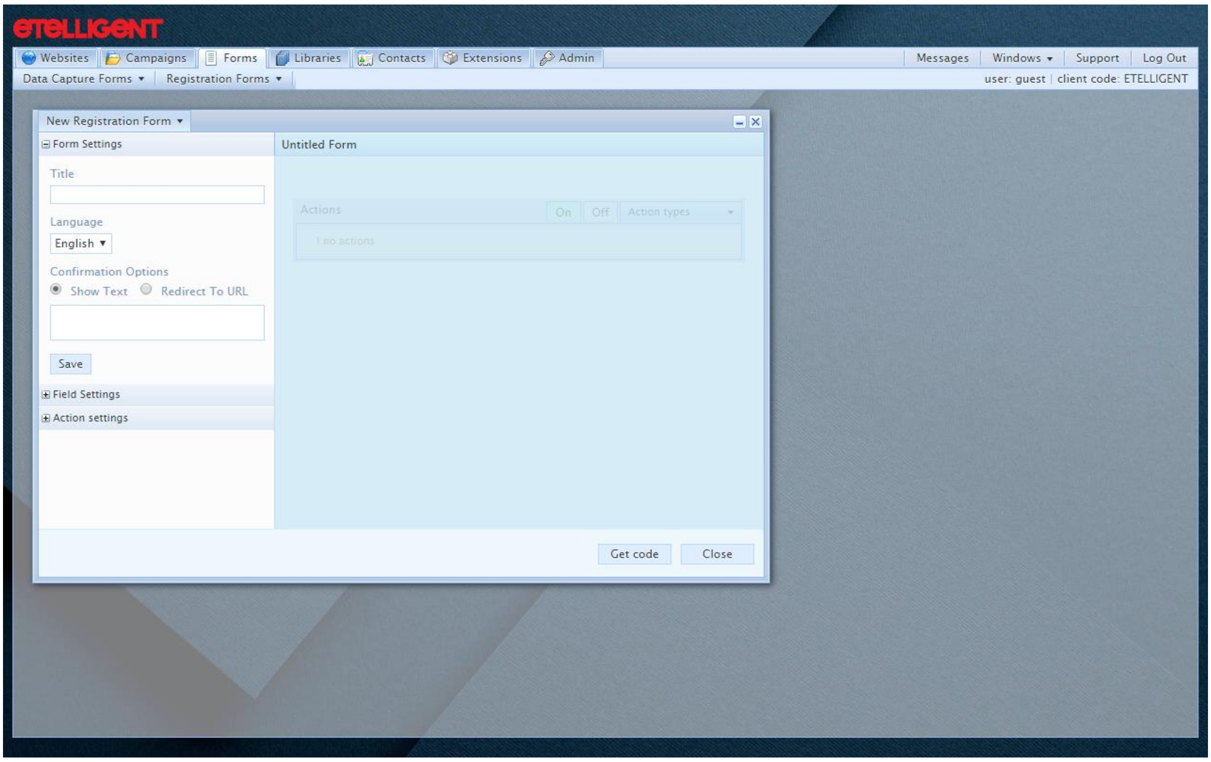
Creating a registration form for sign-up

There are two ways to populate the database of contacts: via an upload or via a registration form. Etelligent offers a simple way to create a registration form and add it to a web site.

1. Click on the **Forms** tab
2. Click on **Registration Forms**



3. Click on **New Registration Form**
4. Complete the form:



Title
The name used in the application to refer to this form

Language
The language used in this form.

Confirmation Options
There are two options:

Show Text - when the form is submitted successfully, it will be replaced on screen with the message entered here.

Redirect To URL - when the form is submitted successfully, the user will be redirected to the Web page entered here.

5. Click on **Save**
6. Click on the '**Fields**' drop-down to select the type of input field you wish to add to the form. Input type is what the user will be presented with when entering information e.g. a series of checkboxes or a drop-down list.

Tip. It is recommended that only Email is assigned to a sign-up form. This is the least amount of information required to be able to email a contact and so by reducing the burden of subscription, the propensity for sign-up is increased.

7. Complete the Field Settings

Name
The name used in the application to refer to this field

Label Caption
The label that will be displayed beside this field when input is required

Label Description
Additional information about this field that can be displayed, for example, in a tooltip

Options (available under ‘Advanced Field Settings’)
Required – If selected, this field must have user-input for a successful form submission
Unique – If selected, this field can never be assigned a value that has previously been successfully submitted.

8. Click on Get code
9. To add the form to a web site, simply paste this code into a page on the site.

> Tip. Please note that owing to browser security changes there can be issues with embedded registration forms. Should you experience any issues, please contact your support team.

Automation

Taking advantage of automation allows a setup-and-forget approach to the laborious mechanics of e-mail marketing.

In Etelligent automation is handled by Triggers, Selections and Actions. How these three concepts interact with one another is perhaps best illustrated by the use of some examples:

If someone submits a form this would trigger (assuming the contact that performed the submission met the selection criteria) an action such as sending a thank you email.

Alternatively, a given time of day can trigger an action (such as sending an email) to be performed against a selection of contacts.

Triggers

There are currently four types of trigger available in Etelligent:

Clicked Link
This trigger is fired whenever a link in an e-mail is clicked

Submitted Registration Form
This trigger fires upon the successful submission of a form i.e. it is not fired when the form displays a validation message such as 'these fields are required'

Date / Time Interval
This type of trigger is fired at a specified time of day

Completed Action
When an action that has been triggered by a previous trigger has completed this can cause another action to occur

Selections

The selection can be the user that activates the trigger. By employing a segment to this scenario, only users who meet the segment's criteria will have the action applied. Alternatively, in the case where the Trigger Type is a Date / Time Interval it would just be a segment that defines the recipients of the action.

Actions

There are four types of action:

Send an Email
A email that has been built as part of a campaign can be queued and sent

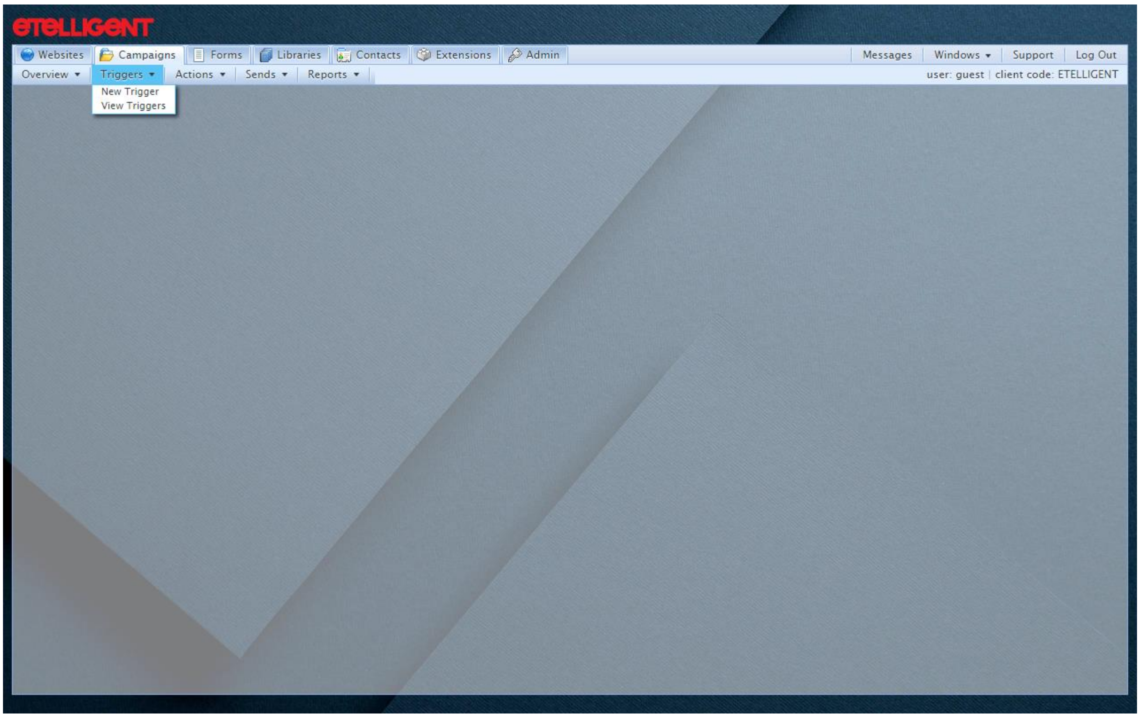
Send an Alert by Email
A notification email can be sent whenever a trigger is fired. A custom message is supplied such as 'A new contact has completed the Registration Form'

Update Profile
This is used to modify the contact's profile based on their interactions. For example, a Custom Field 'Interested in Theatre' could be set whenever someone clicks on a related link in an email

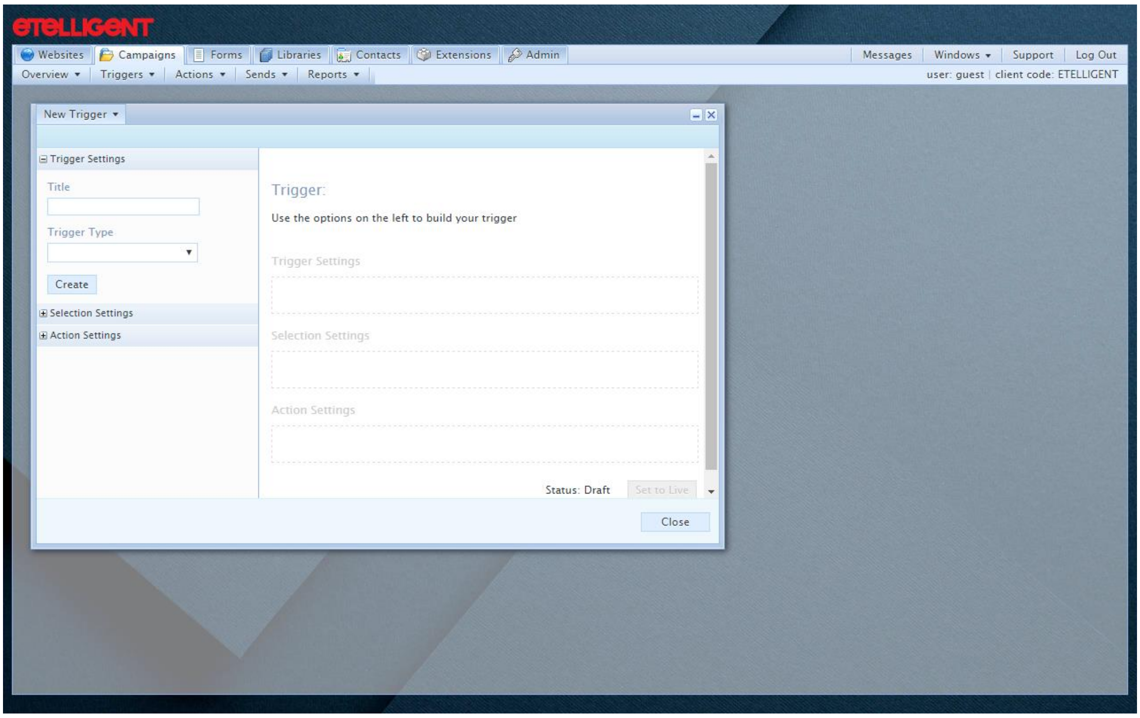
Data Import
This is an advanced option and is used to schedule regular imports of data. This would be used in conjunction with a Date/Time Interval trigger.

Sending an alert

1. Click on the **Campaigns** tab
2. Click on **Triggers**



3. Click on **New Trigger**



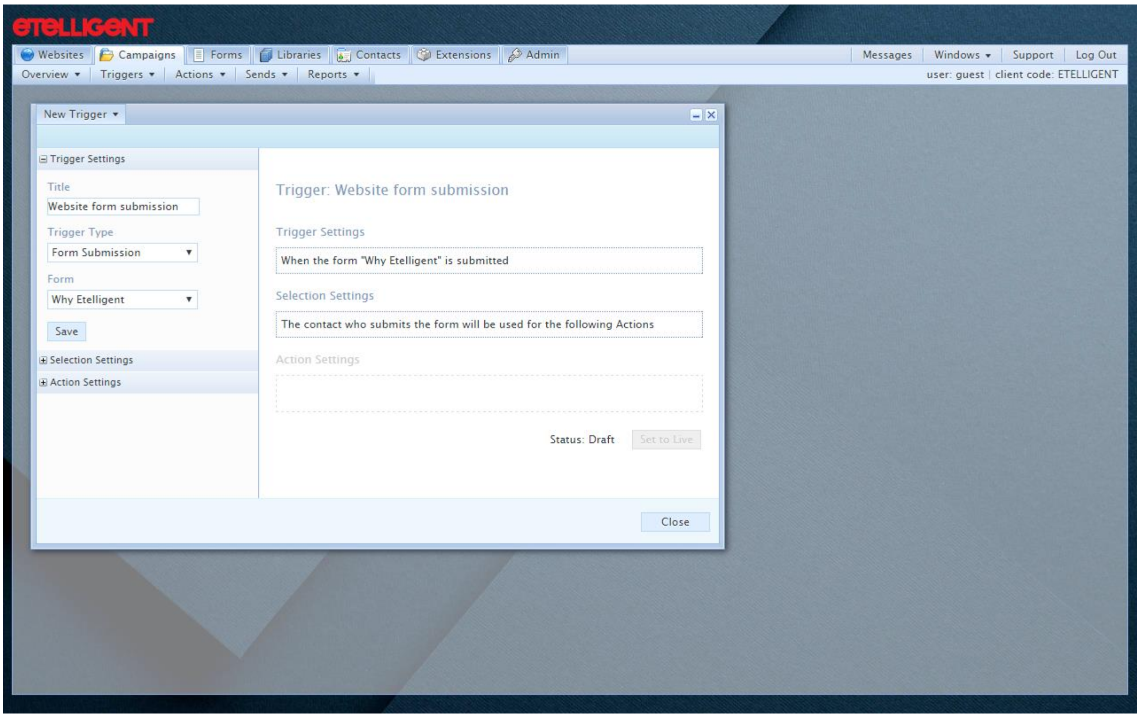
4. Complete the form:

   Title
   The name used in the application to refer to this Trigger

   Trigger Type
   The available trigger types: Clicked Link, Submitted Registration Form, Date / Time Interval, Completed Action.

Select Submitted Registration Form. Selecting this will reveal a drop-down list of Registration Forms available.

5. Click **Create**

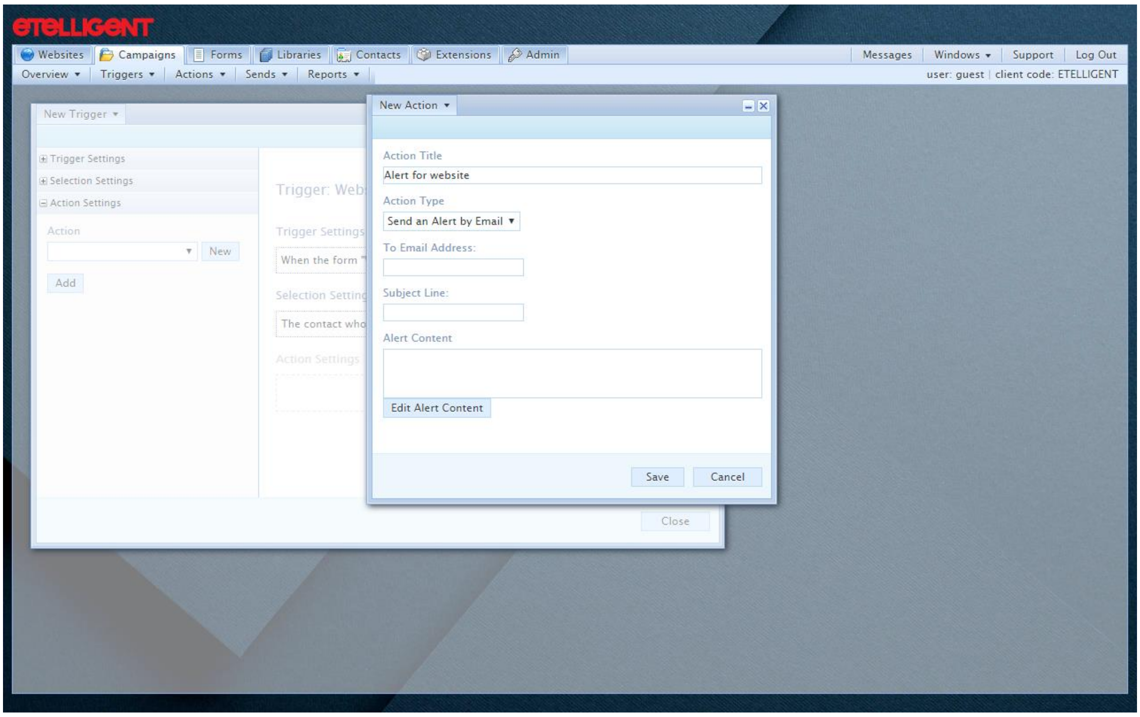


The trigger settings have been added to the 'Workspace'.

The Selection Settings have been prefilled and the user who submits the form must be the selection.

> **Tip**. This can be filtered further to ensure that the action is only performed if the user passes additional criteria.

6. Click on **Action Settings** to reveal its options
7. Click on New to launch the Action Creation dialog



Action Title
The name used in the application to refer to this Action

Action Type
The available Action Types: Send an Email, Send an Alert by Email, Update Profile, Data Import.

Select Send an Alert by Email. Selecting this will reveal options particular to this Action.

To Email Address
The e-mail address of the recipient of the alert

Subject Line
A subject line to send with the alert email to inform the recipient as to the content of the e-mail

Alert Content
The actual message of the alert. Note: This can contact merge fields so that the fields that are entered in the registration form can be sent as part of the alert.

8. Click Save

   This will close the window and add the Action to the drop-down list of available Actions.

9. Click Add

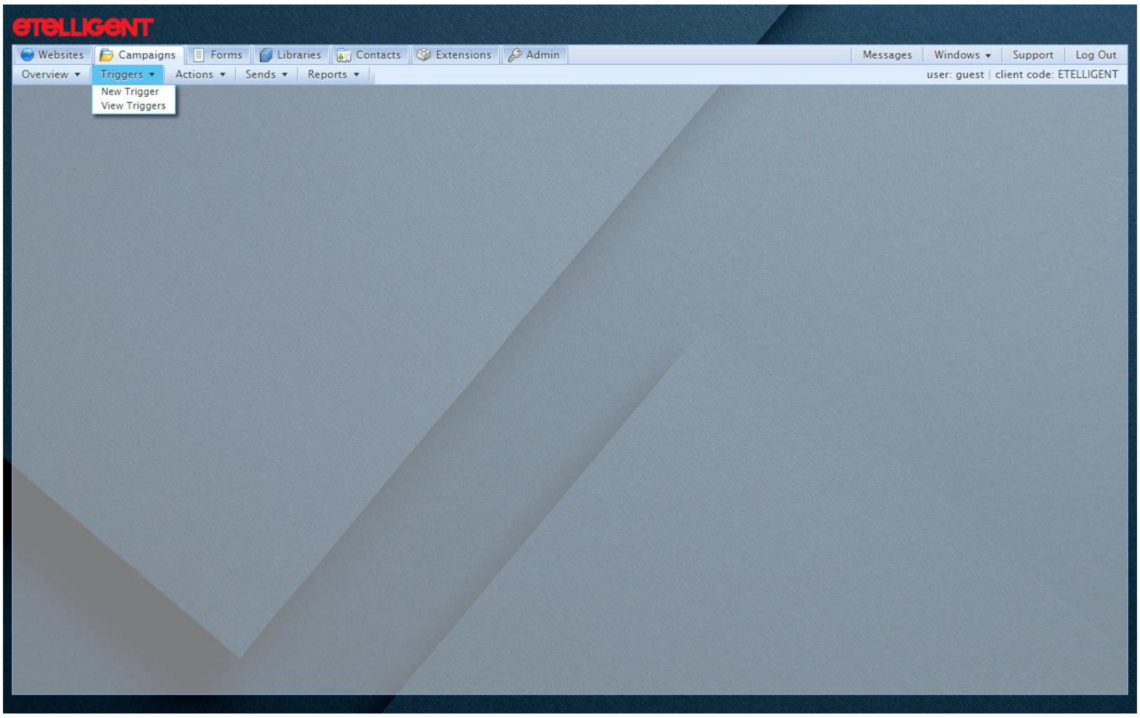
   The Trigger-Selection-Action is now complete but is in Draft mode. This means that the trigger will not fire until the Status has been set to Live.

   NOTE: This allows for the trigger to be suspended temporarily by simply editing the Trigger and clicking the Set to Draft.

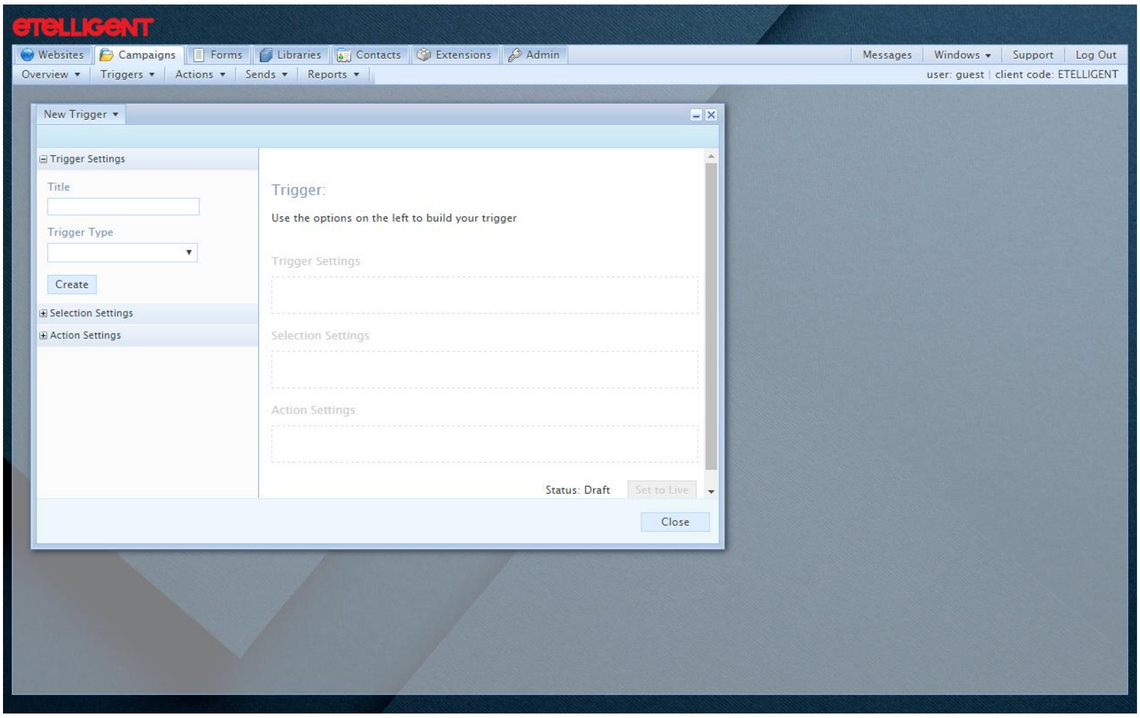
10. Click Set to Live
11. Click Close

Sending an automated email

1. Click on the **Campaigns** tab
2. Click on **Triggers**



3. Click on **New Trigger**



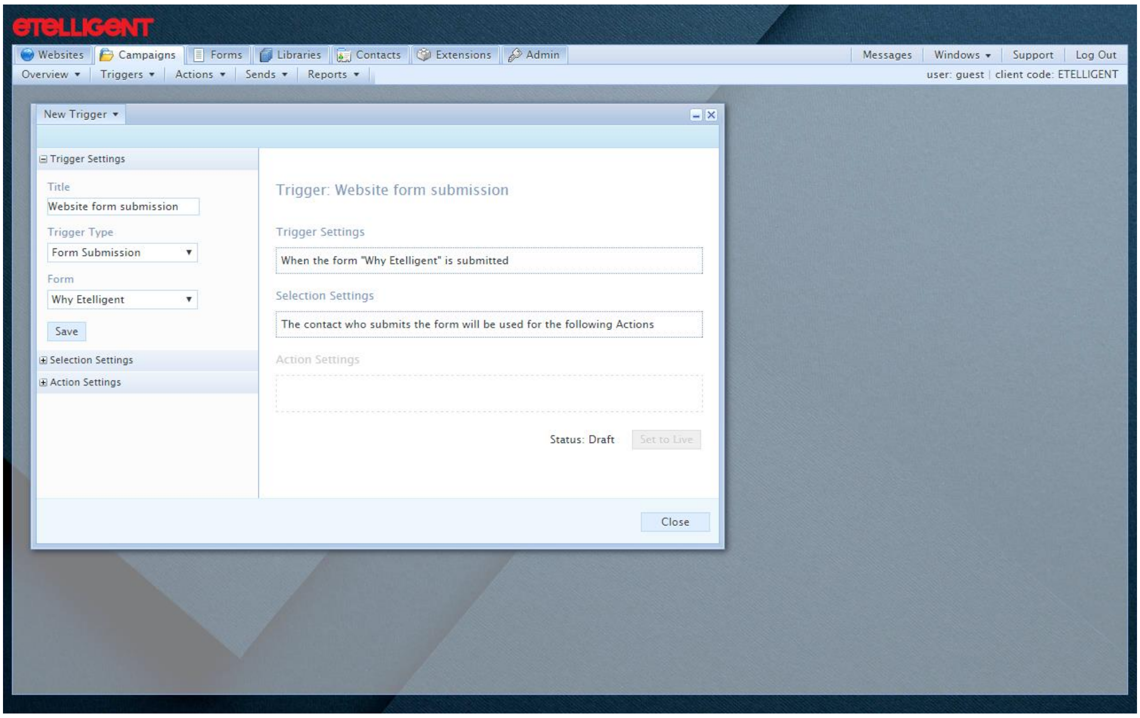
4. Complete the form:

   Title
   The name used in the application to refer to this Trigger

   Trigger Type
   The available trigger types: Clicked Link, Submitted Registration Form, Date / Time Interval, Completed Action.

Select Submitted Registration Form. Selecting this will reveal a drop-down list of Registration Forms available.

5. Click **Create**

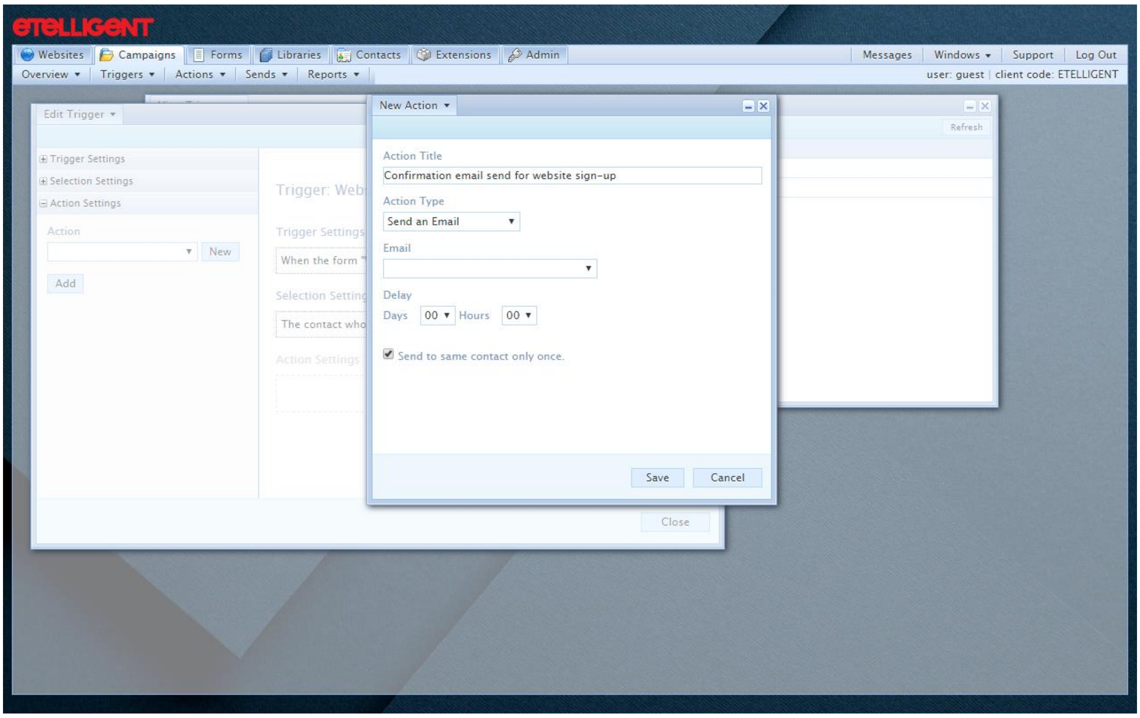


The trigger settings have been added to the 'Workspace'.

The Selection Settings have been prefilled and the user who submits the form must be the selection.

Tip. This can be filtered further to ensure that the action is only performed if the user passes additional criteria.

6. Click on **Action Settings** to reveal its options
7. Click on **New** to launch the Action Creation dialog



Action Title
The name used in the application to refer to this Action

Action Type
The available Action Types: Send an Email, Send an Alert by Email, Update Profile, Data Import.

Select Send an Email. Selecting this will reveal options particular to this Action.

Email
The e-mails from the campaigns that can be sent as a response to this trigger being fired

Delay
How many days and hours to delay the sending of the response

Send to same contact only once
If checked, this option ensures that repeated executing of the trigger do not result in repeated actions being performed

8. Click Save

   This will close the window and add the Action to the drop-down list of available Actions.

9. Click Add

   Tip. More than one action can be added to a trigger.

   The Trigger-Selection-Action is now complete but is in Draft mode. This means that the trigger will not fire until the Status has been set to Live.

   Tip. This allows for the trigger to be suspended temporarily by simply editing the Trigger and clicking Set to Draft.

10. Click Set to Live
11. Click Close

Personalisation

Simply sending every email to all of your contacts is to remove the 'marketing' from e-mail marketing. Having created both a registration form and an update profile form to gain a better understanding of the breakdown of the audience it is advisable to use this to send relevant content to your audience.

Segments, as their name suggests, allow a Mailing List to be segmented.

There are four different types of segments:

Contact's Profile
uses the default and Custom fields associated with the contact as a basis for the condition

Mailing List
Allows contacts belonging to specified mailing lists to be included or excluded

Import Upload
Allows contacts belonging to specified upload to be included or excluded

Email Send
Allows contacts who were sent a specified email, or opened a specified email, or clicked on a specified link within an email to be included or excluded

Rules and Conditions

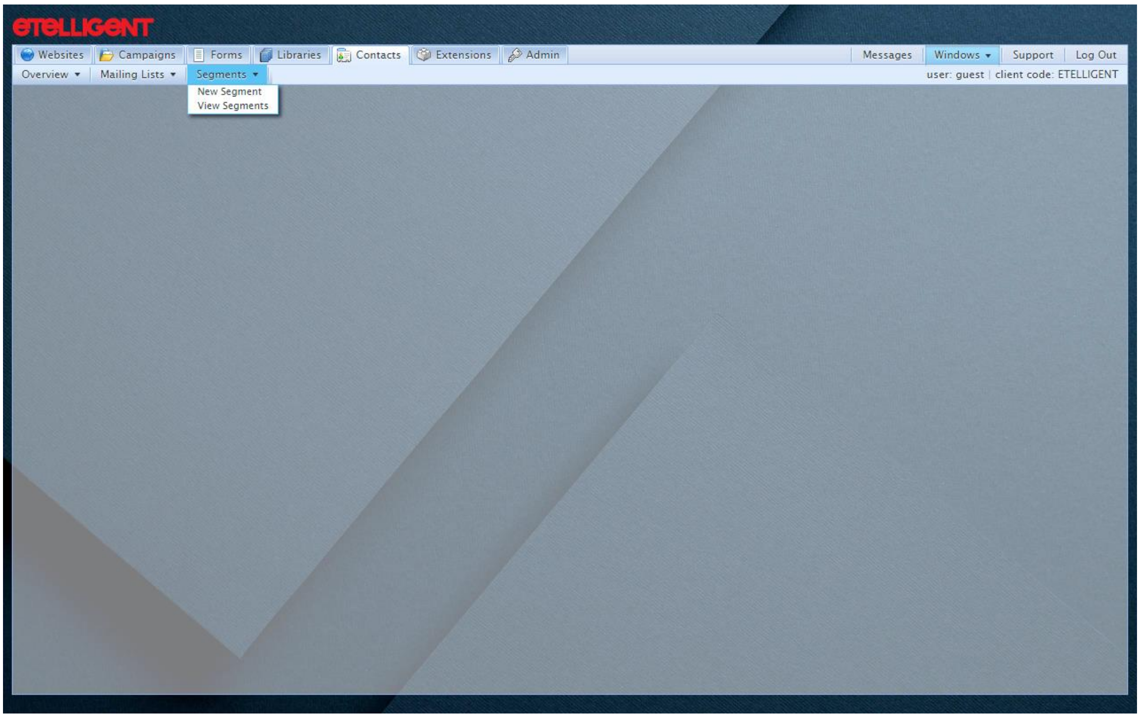
A segment is made up of a number of **rules** and **conditions**.

Conditions are 'ANDed' whereby only contacts who satisfy both constraints are selected by the segment.

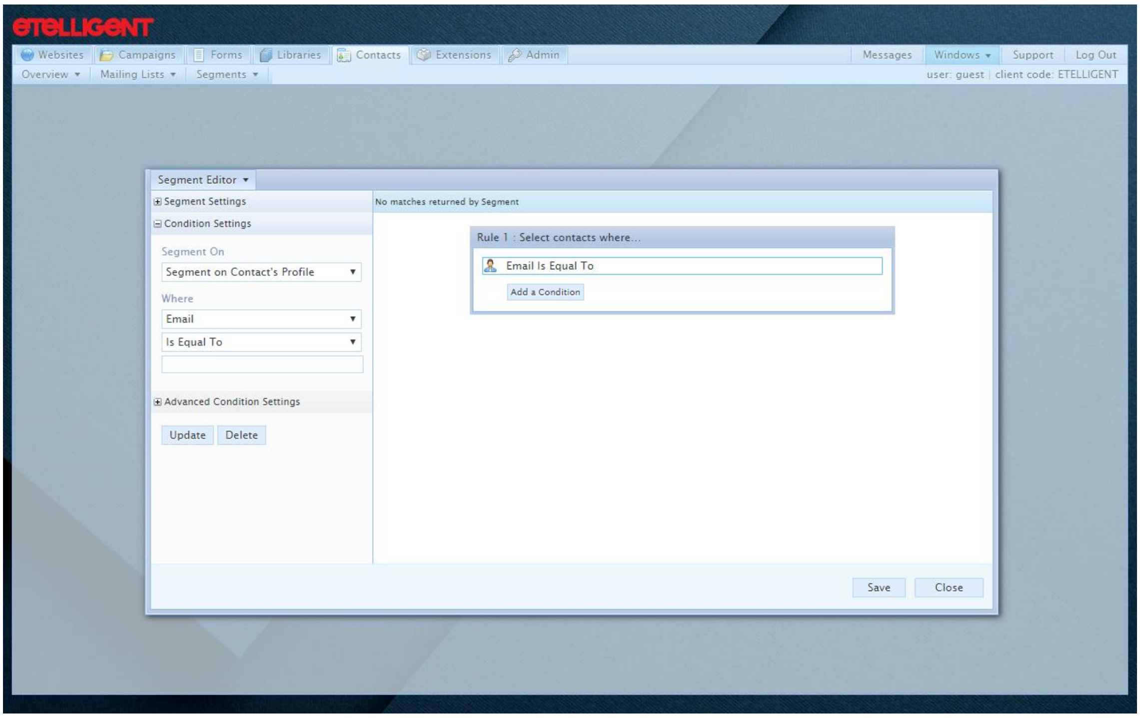
Rules are 'ORed' whereby contacts who satisfy any rule are selected by the segment.

Creating a Segment

1. Click on the **Contacts** tab
2. Click on **Segments**



3. Click on **New Segment**
4. The first rule is created for you. Click on **Add a Condition**



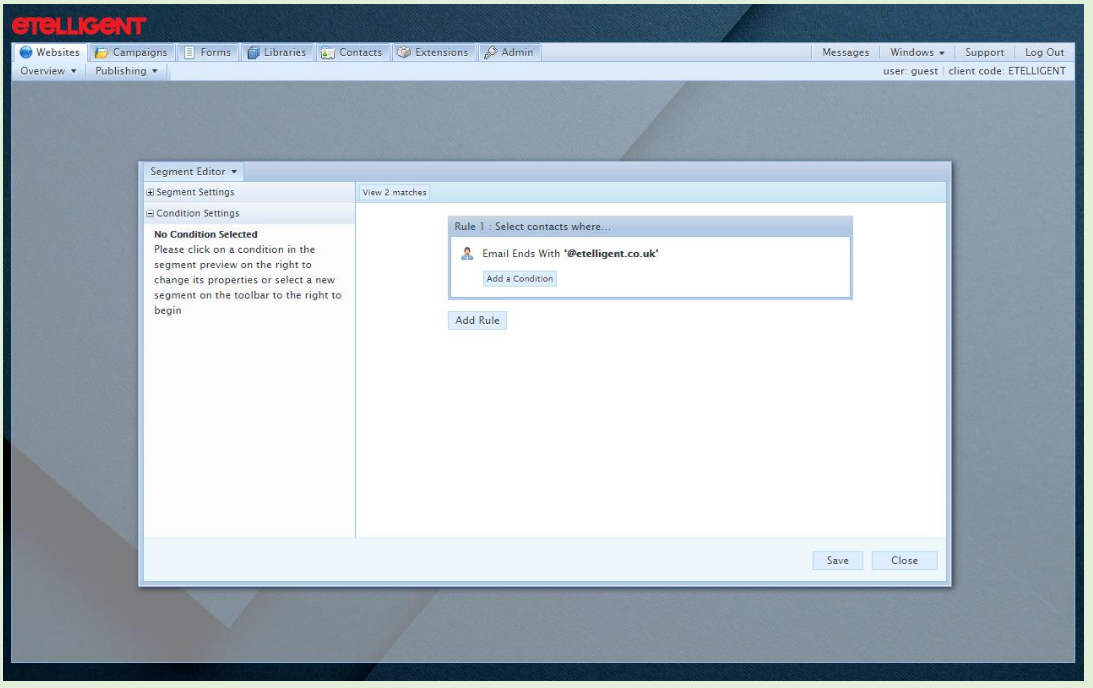
5. Use the options under Condition Settings to specify a condition

Example

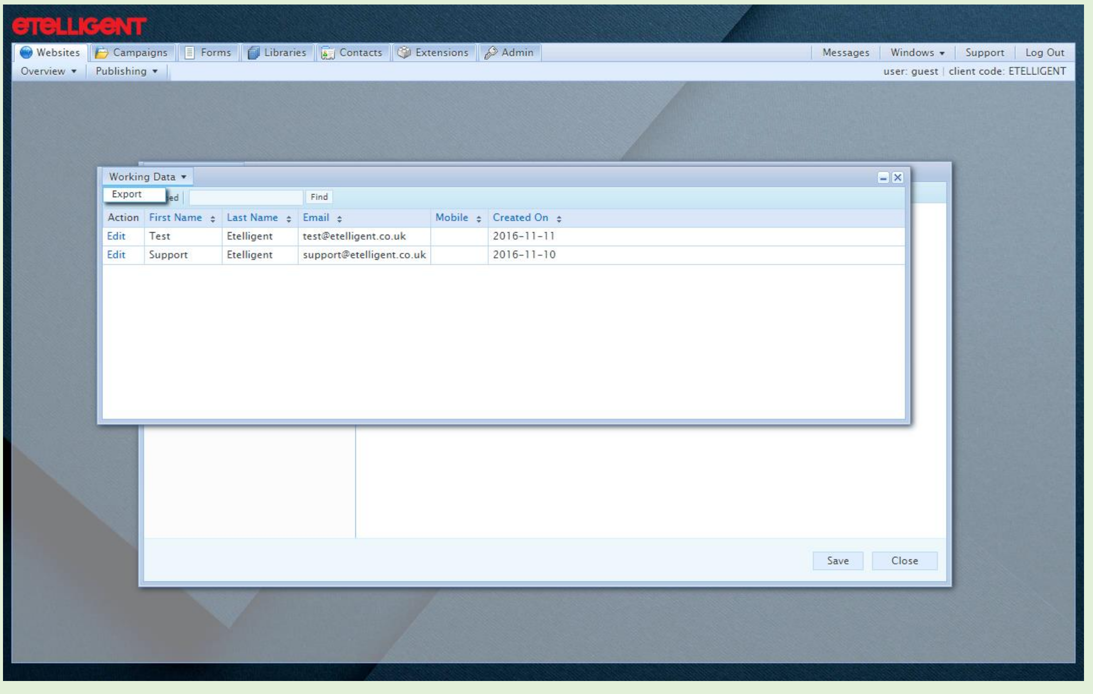
Select Segment on Contact's Profile + Last Email Client + Starts With + 'Outlook' to find out how many contacts have recently opened their emails using the Microsoft Outlook email client.

6. Click **Update** to update the condition with the settings

Tip. After clicking **Update** you can export the contacts that match the segment by clicking on the button above the rule set ('View 2 matches' in the screenshot below)



Then in the Working Data window that opens, click on the title button and **Export**

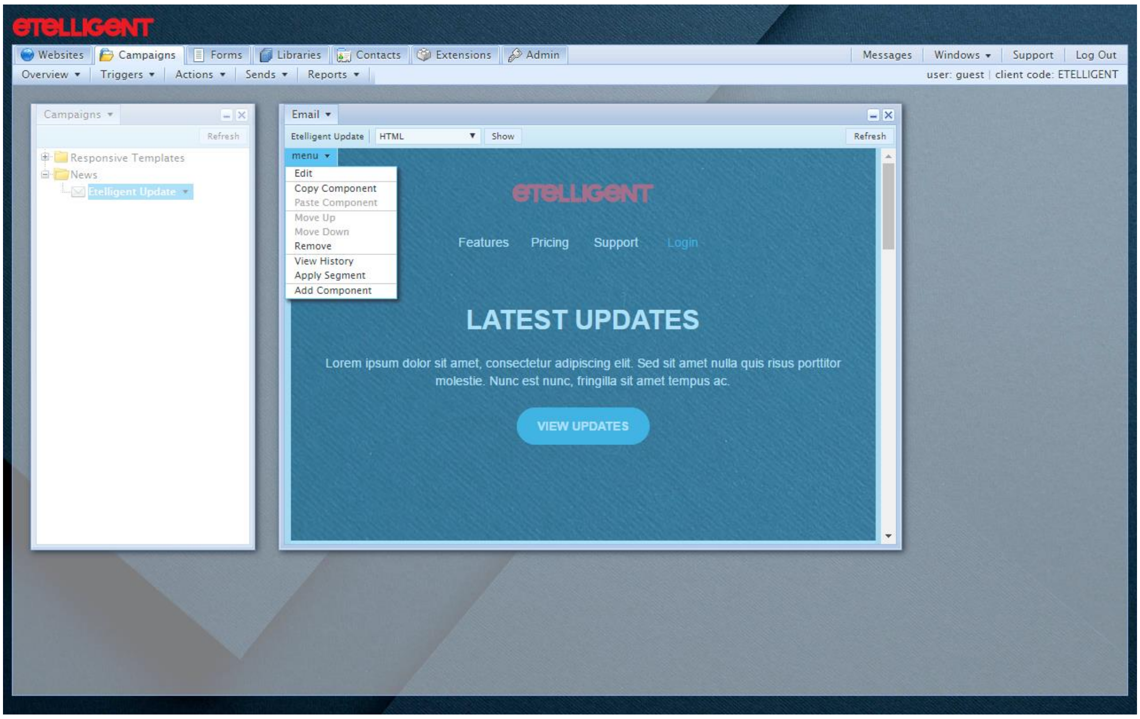


7. Once all the rules and conditions have been added, click **Create**
8. The summary of all segments is displayed including a summary number of contacts who will belong to this segment

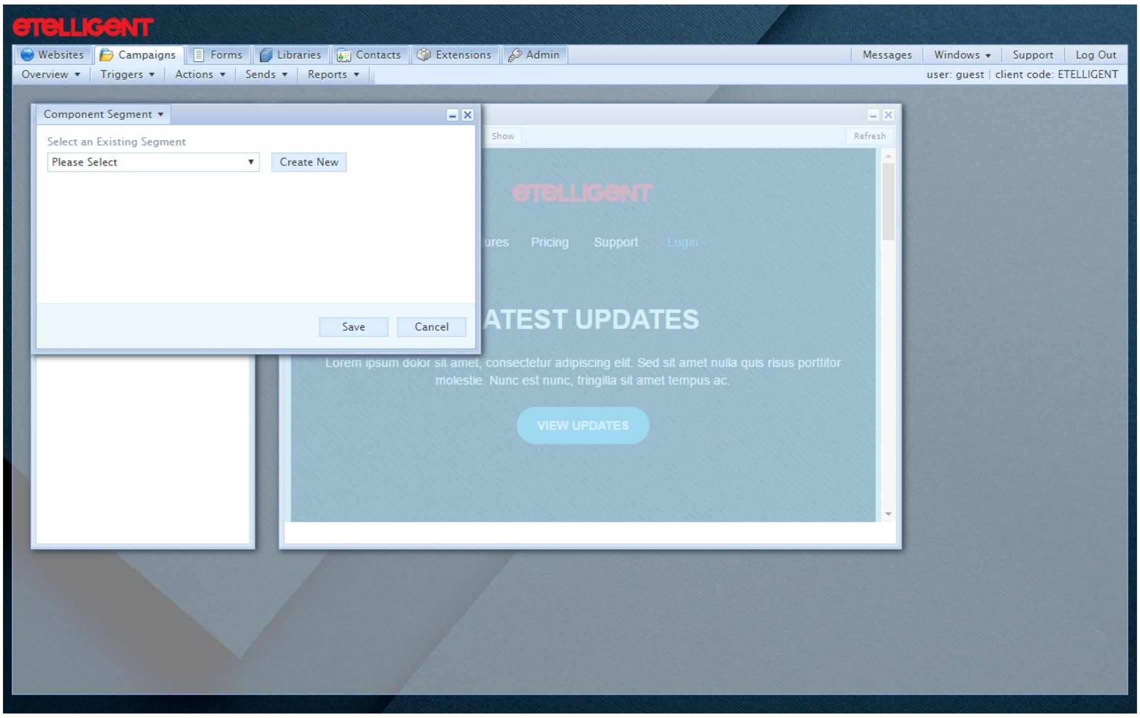
Personalising e-mails

As well as segmenting contacts to receive an email, individual components in an email can be segmented so that they are only visible to those contacts that the segment applied to them returns.

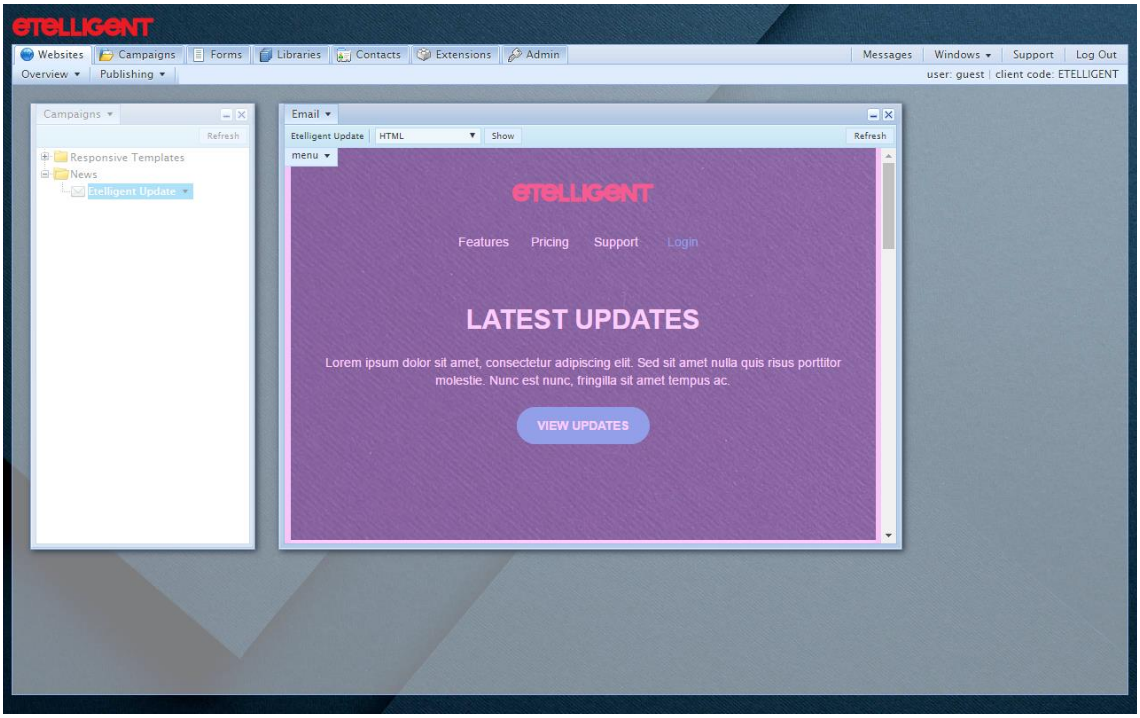
1. Open an e-mail
2. Click menu on the component that the segment is to be applied to



3. Select the segment from the drop-down list of available segments



4. Click **Save**
5. The components with segment applied to them are indicated by a 'purple' transparency as opposed to the standard blue transparency



Support

support@etelligent.co.uk

Being Communications Ltd.
38-52 Lisburn Road
Belfast
BT9 6AA

028 9073 5980

www.beingonline.co.uk | www.etelligent.co.uk