joined-up
digital...
ready to go!

ETELLIGENT

# Getting started with Email Marketing

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

Etelligent is an email-marketing web application that combines legitimate bulk mail sending with supporting engagement measurement tools.

The application uses familiar interface techniques such as windows, drop-down menus, right-clicking, and double-clicking to provide an intuitive method of working with your data.

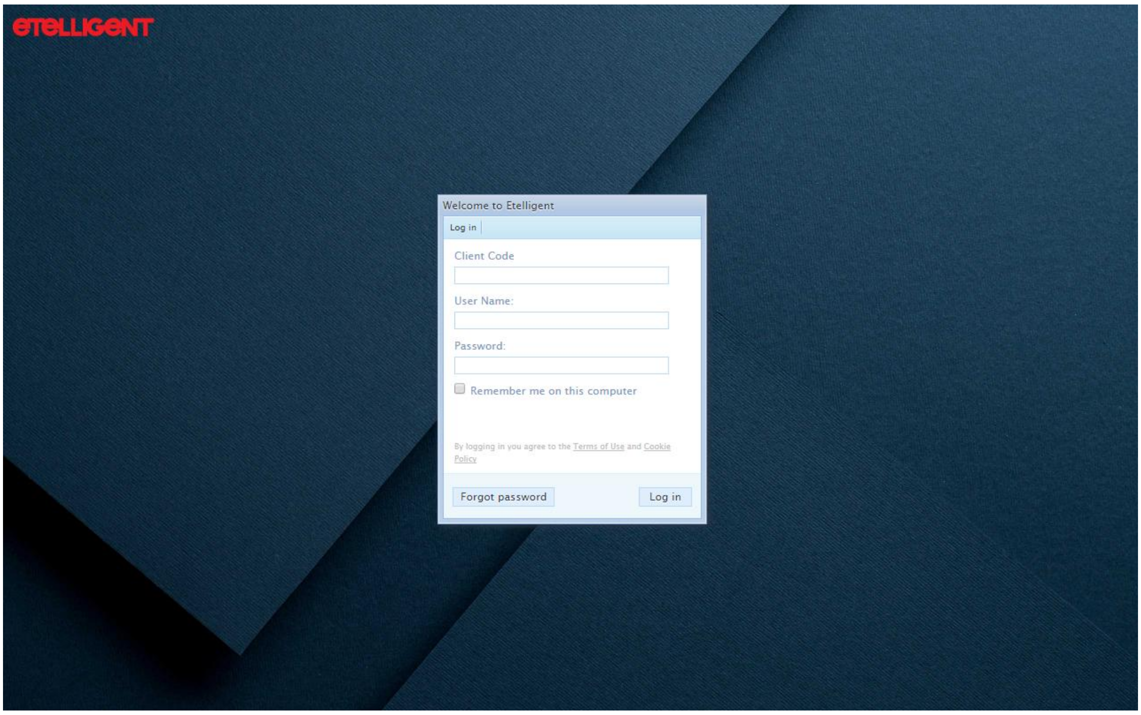
This guide is intended to provide a step by step approach to getting started with the application. It does not cover how to analyse reports or perform advanced features such as triggered emails. It rather, explains how to log in, send an email and view reports based on that send.

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

# Create a campaign

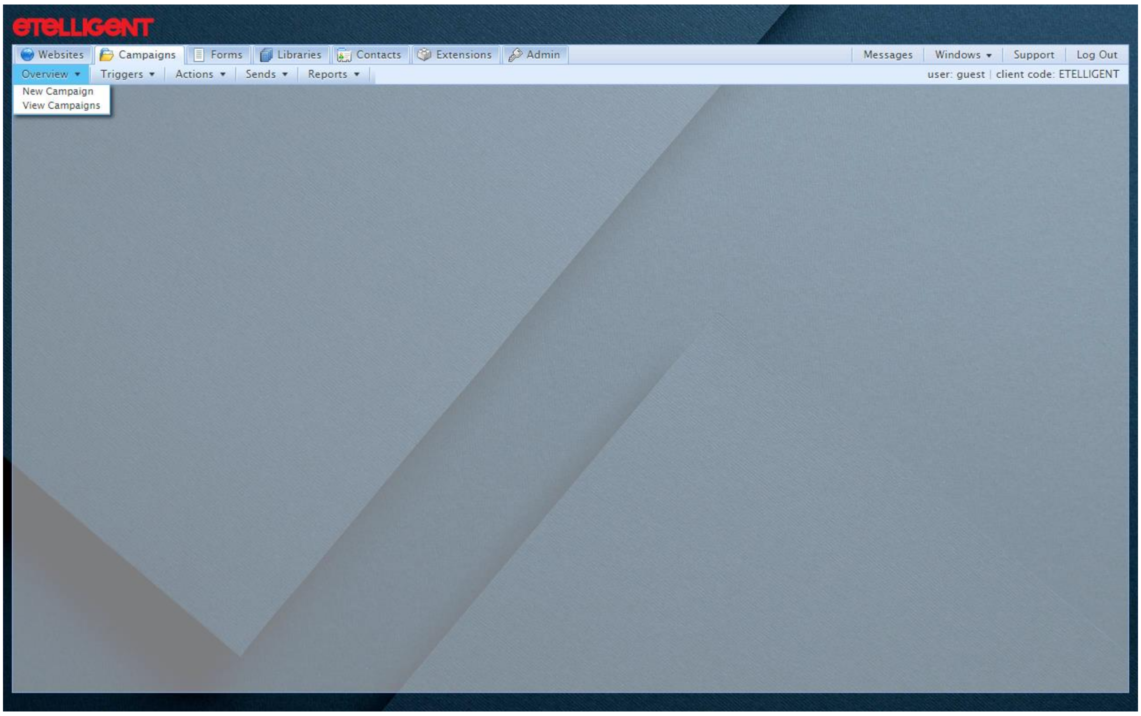
Campaigns are, in very simplistic terms, the 'folders' of associated emails and dynamic web pages.

For example, when planning a summer campaign which will involve two emails and a registration form, a campaign would be created to house all these common resources.

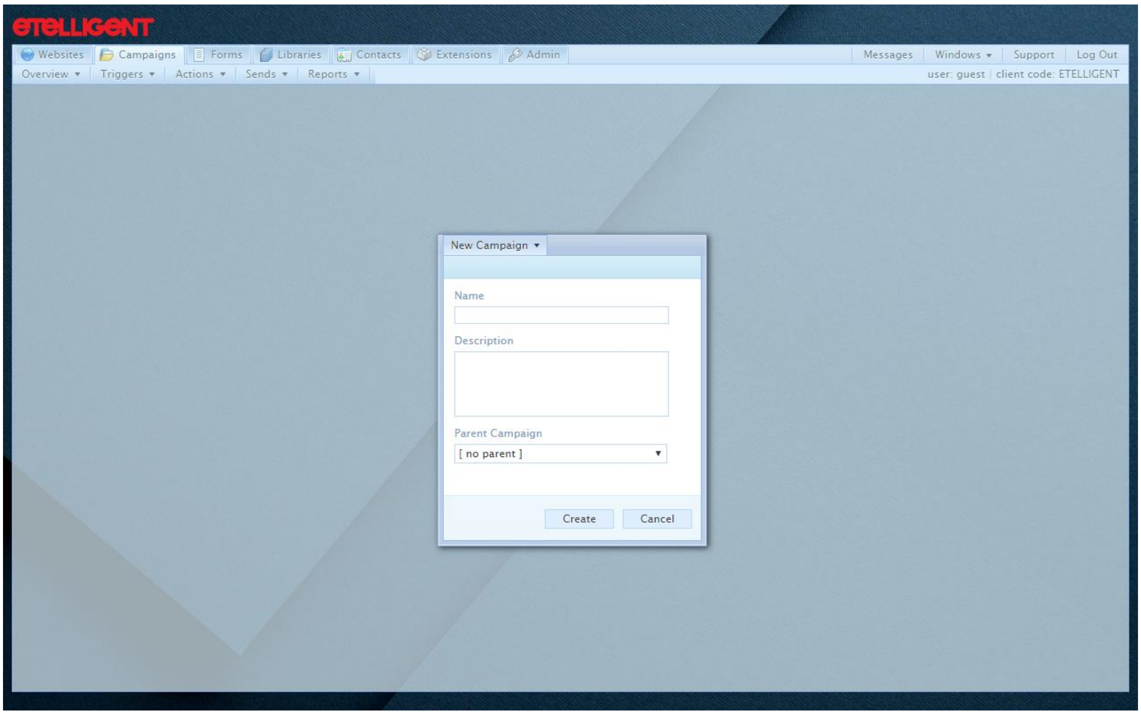
Defining a campaign enables aggregated campaign-wide reporting to be returned which can help measure the success of the overall efforts.

Campaigns exist in a 'tree' structure i.e. one campaign can be part of another.

1. Click on the **Campaigns** tab
2. Click on **Overview**
3. Click on New Campaign



4. Complete the properties form (Step 1 of the form):




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

Description
A brief description of the contents of this campaign

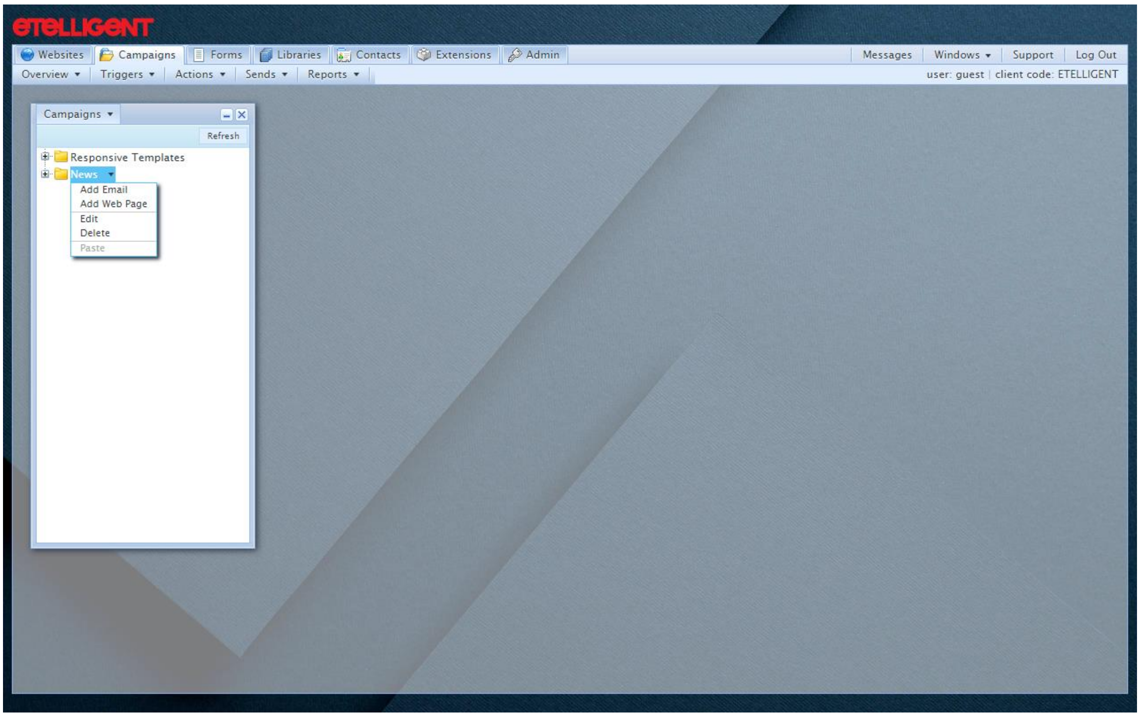
Parent campaign
The campaign that this campaign will be a part of

5. Click **Create**

# Add an email

Communication via email is a preference that most people expect from any organisation operating today. Using the features provided by this application, you can not only create and send emails, you can also monitor the recipient's interaction and automate responses to their behaviour.

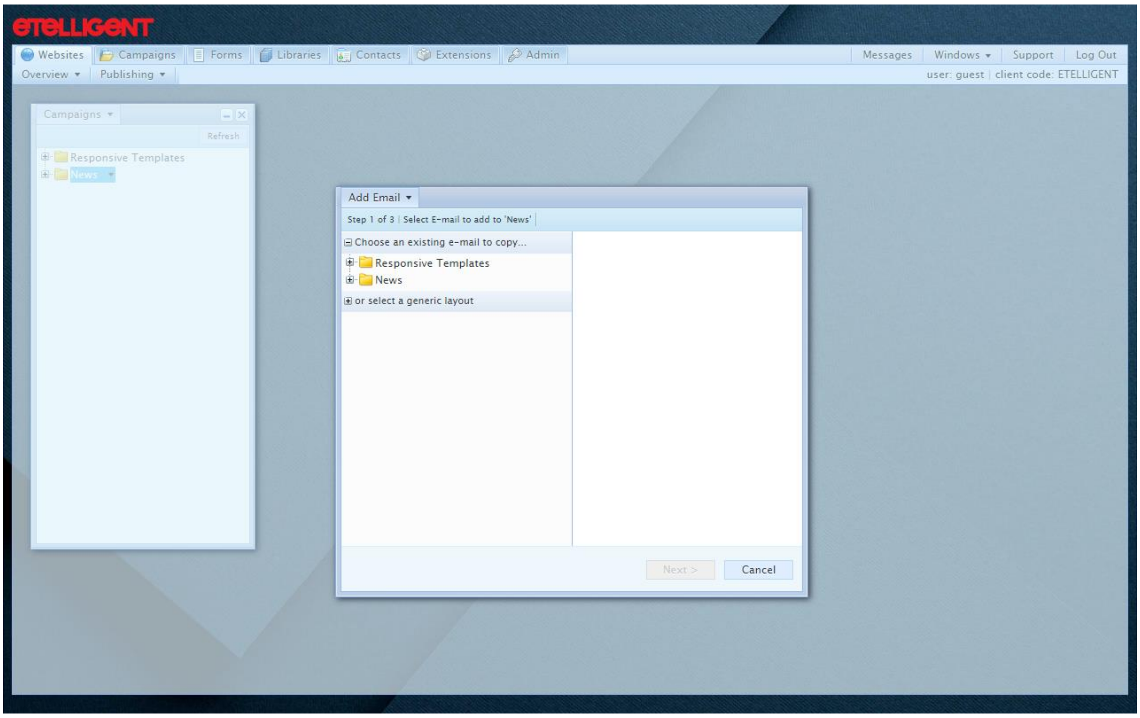
1. Click on the **Campaigns** tab
2. Click on **Overview**
3. Click on View Campaigns
4. Use the plus icons if necessary to navigate to a campaign that you wish to add the email to
5. Click on the name of the campaign




**Responsive email templates**

Owing to the rise in the number of people viewing emails on mobile devices, some email templates can adapt to different screen sizes, scaling images whilst keeping text sizes readable. If you wish to find out more about getting responsive email templates, please contact your support team.

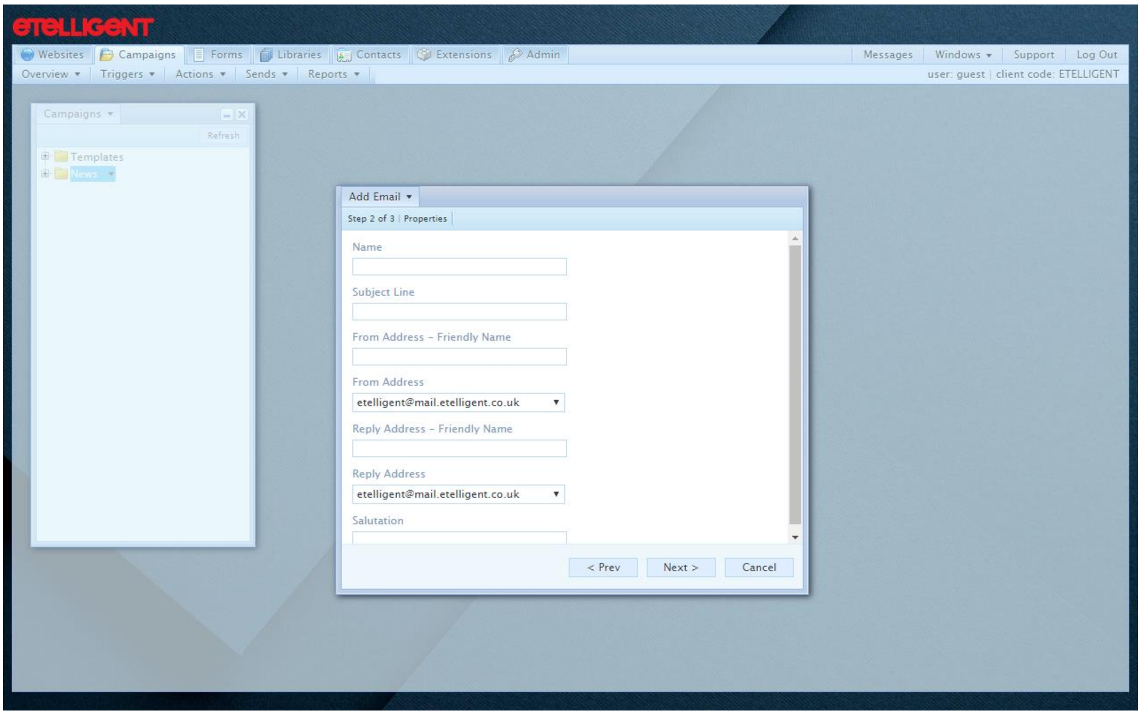
6. Click on Add Email




7. Select a layout (template) to base your email on or choose an existing email in another campaign to copy.

> Tip. It is recommended that you choose **an existing e-mail to copy** and then select from the **Responsive Templates** folder. If that folder does not exist and you would like to explore the option of using Responsive Templates, please contact your support team.

8. Click on the *name* of the email that you wish to copy
9. Click on **Next** > to continue
10. Complete the properties form (Step 2 of the form):



11. Name
The name used in the application to refer to this email

Subject Line
The subject line that recipients will see upon receipt of this email

From address – friendly name
The name displayed in the recipient's mailbox

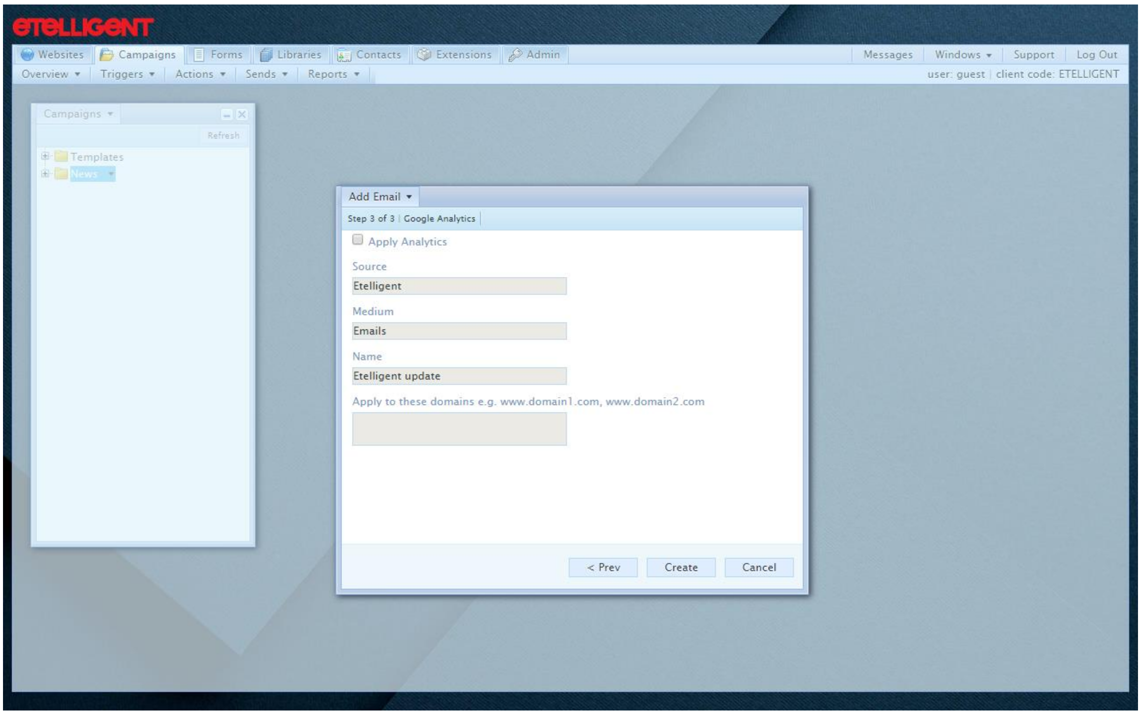
From address
The email address the email is sent from

Reply address – friendly name
The name used to reply to

Reply address
The email address that replies to the email will be sent to

Salutation
The default setting for the name merge field. If first name cannot be found, and a title and last name also cannot be found then this value is used e.g. 'Customer', 'Client'

12. Click **Next** > to move to Step 3
13. To set default values for Google Analytics click on **Apply Analytics** and complete the form:




Source
This is the name of the application

Medium
This is the name of the medium of the message e.g. email

Name
This is the name of the email message

14. Apply to these domains
    Only the domains listed here will have the Google Analytics tagging code applied. These should be domains that you have access to the Google Analytics account and have Google Analytics tracking code on the web pages. Separate multiple domains with commas

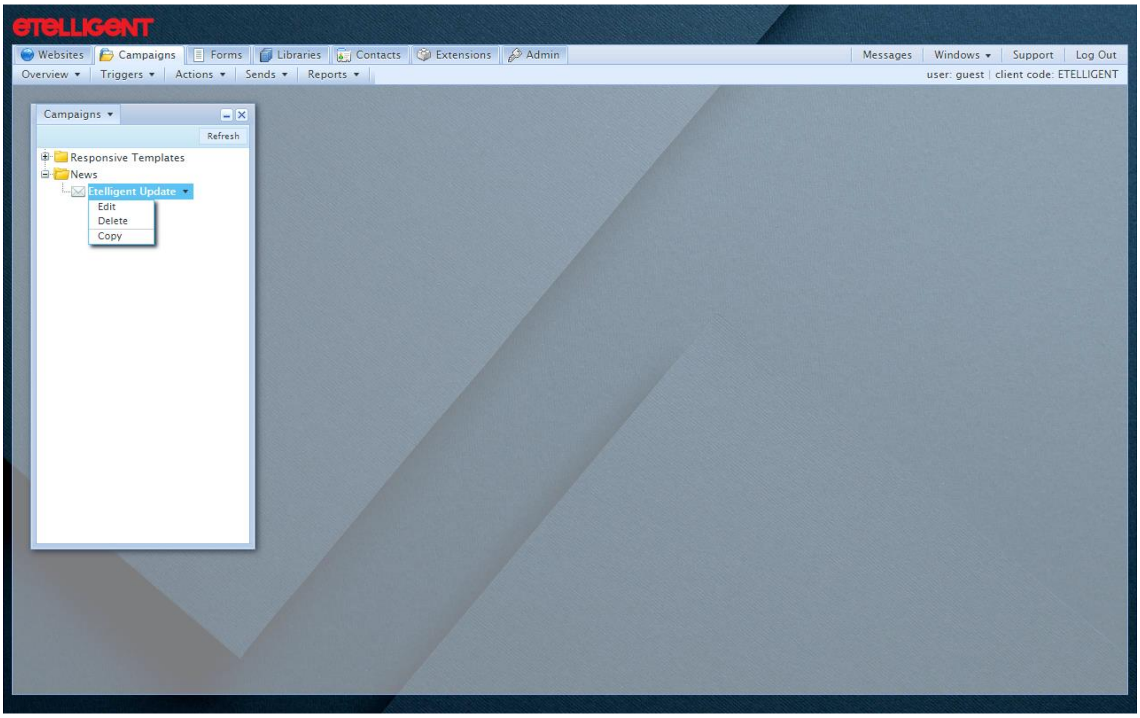
15. Click Create

Tip. A quick way to get started is to navigate to an email you wish to copy, and click on its name. Select Copy. Then navigate to a campaign you wish your new email to appear in, click on the folder name, and select paste.

# Edit an email

Once an email has been created, the email can then be selected for editing.

1. Click on the **Campaigns** tab
2. Click on **Overview**
3. Click on **View Campaigns**
4. Use the plus icons if necessary to navigate to an email you wish to edit

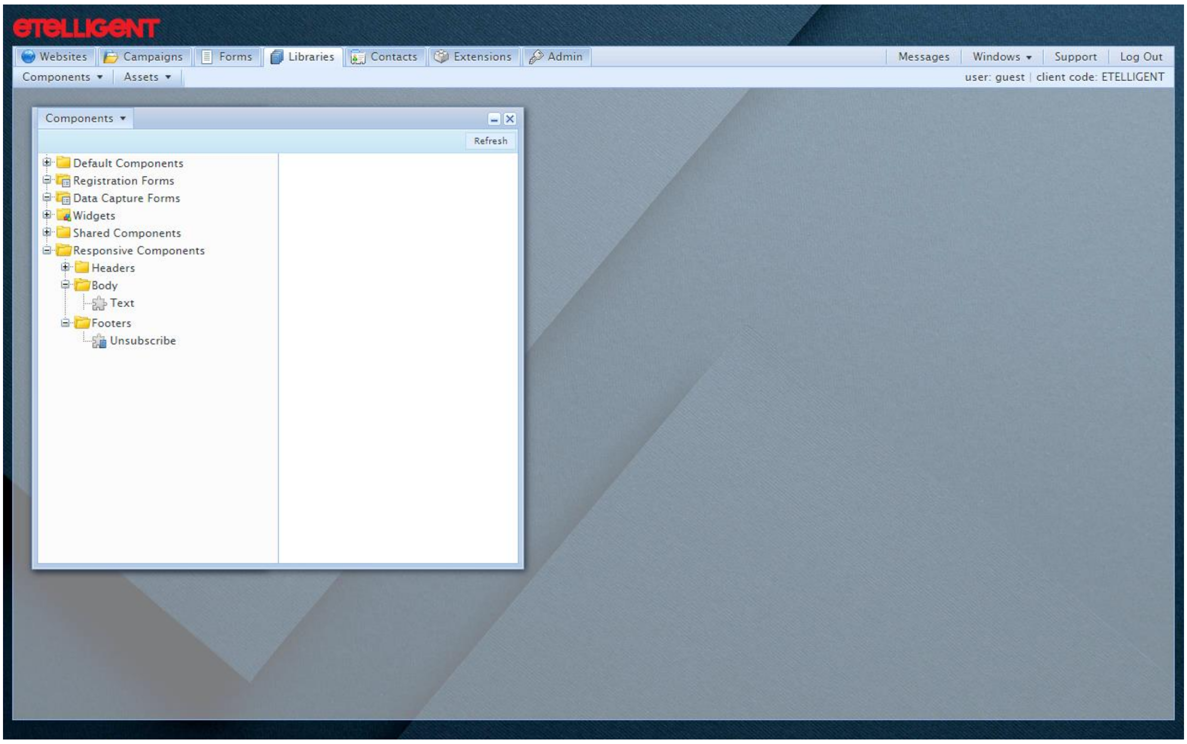



5. Click on the name of the email
6. Click on **Edit**

# Components

Each email and web page is made up of one or more regions. Each region contains one or more components. You can only move components within their allocated region.

The Component Library is a folder structure where pre-built components by your support team are housed. These components are the building blocks of emails.




There are two main types of components:

### Normal Component

These components can be added from the Component Library and when edited within an email will not affect the original component in the Component Library. A Normal Component is indicated by a jigsaw piece icon – see the Text component in the Body folder in the Component Library visual.

### Shared Component

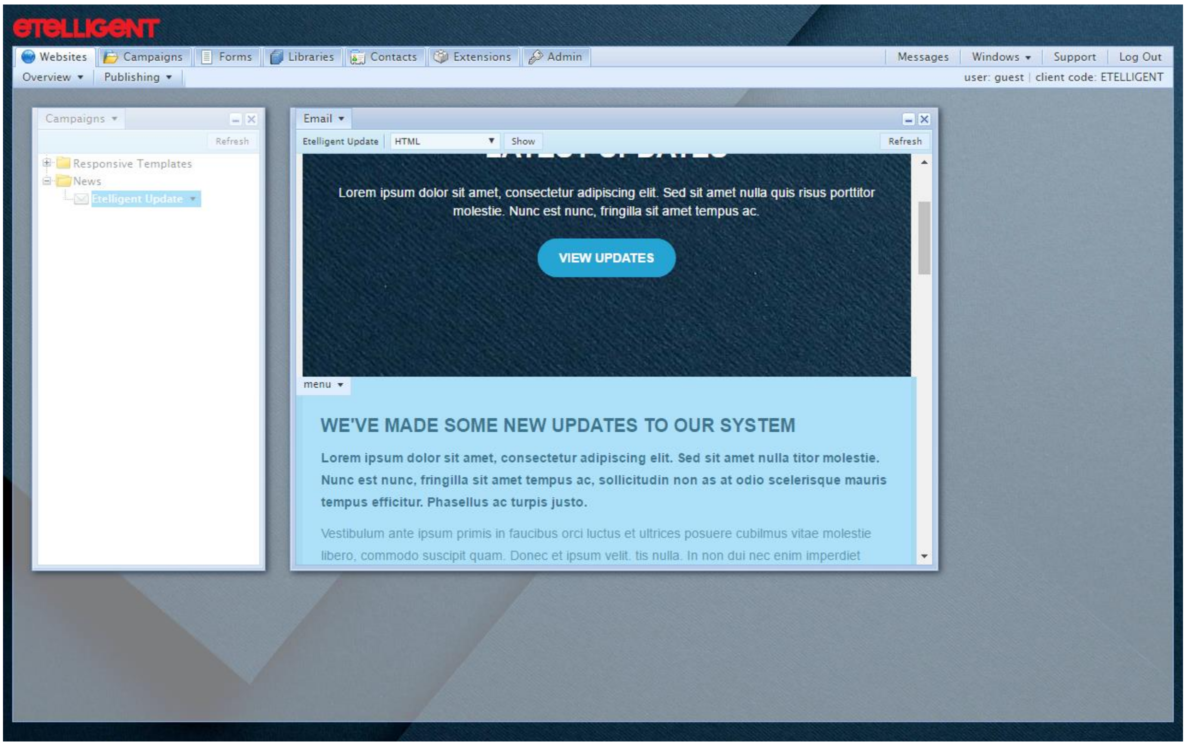
These components, when edited, affect all 'instances' of the component as it appears in all emails and in the Component Library. An example of this type of component would be a header or footer where, should an address in the footer require updating, changes to the component will update all 'instances' of it across all templates within the application. A Shared Component is indicated by a jigsaw piece icon with a blue link corner – see the Unsubscribe component in the Footers folder in the Component Library visual.

### Responsive Components

Responsive email templates must be made up entirely of responsive components. It is not possible to 'mix-and-match' without breaking the responsive nature of the email. If Responsive email templates have been pre-built, you should see a folder in the Component Library called **Responsive Components**. Only components from this folder should be used in a responsive email

Within an email, moving the mouse over a component will select it. The component is highlighted by an overlay which contains a menu button.

Clicking on the menu button will display the actions that can be performed on that component




## Adding a component

1. Select the component you wish to add the new component before
2. Click the **menu** button
3. Click Add component
4. Use the plus icons if necessary to navigate to the component to be added
5. Click on the name of the component to be inserted
6. Click **Insert**
7. The email will reload with the new component added

## Removing a component

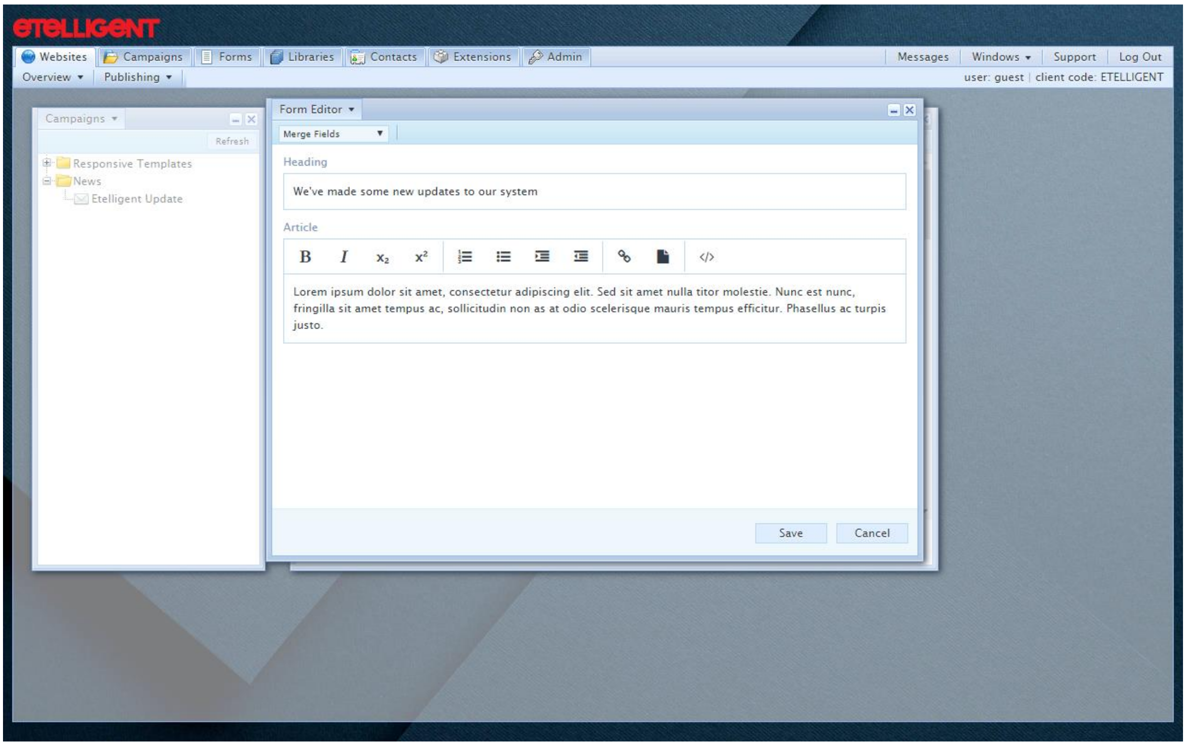
1. Select the component you wish to remove
2. Click the **menu** button
3. Click **Remove**
4. The email will reload with the selected component remove

# Editors

Some components are preconfigured to be updated using the **Form Editor**, whilst others use the **Graphical Editor**. The name of the editor in use appears as the window title within Etelligent.

### Form Editor

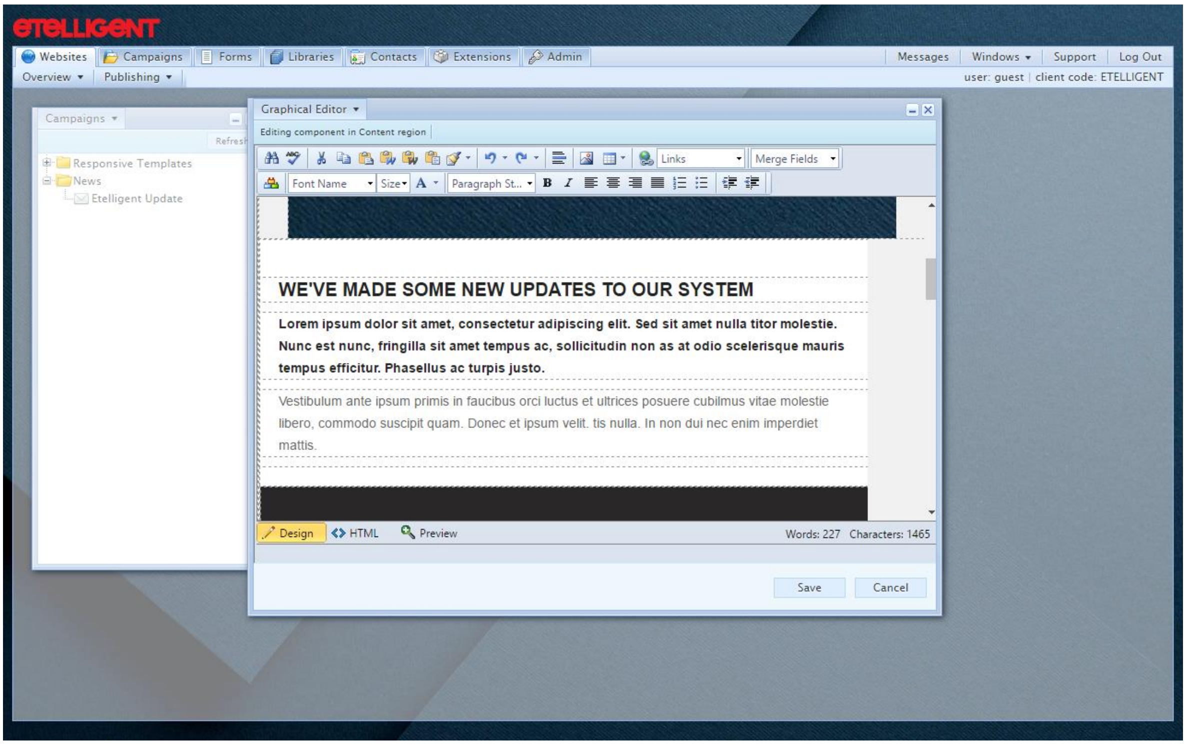
The Form Editor enables quick updating where the focus is predominently on the content itself.




The Form Editor is a faster editing process where only the content is presented in a series of form fields. This means that issues such as maintaining font sizes, colours, etc. are all stored in the component itself.

The Form Editor does itself include a rich-text editor that provides controls to make text bold, insert hyperlinks etc.

Graphical Editor
The graphical editor allows the greatest flexibility but requires more effort as layout, as well as content, has to be managed.




The Graphical Editor gives full editing control but does not support copying and pasting directly from Microsoft Word. It also requires greater effort over maintaining layouts.

## Editing Components

Tip.

If using the **Form Editor**, you can copy-and-paste directly from Microsoft Word. Note however that complex styling may be lost.

If using the **Graphical Editor**, in order to quickly get text from Microsoft Word into the Graphical Editor, it is advisable to copy the text from Word and paste it into Notepad (or another plain text editor). Once in Notepad, highlight the text again and copy it and paste into the online editor – this removes any formatting and ensure clean code which should reduce the chances of rendering problems in email clients or web browsers.

1. Select the component you wish to edit by positioning the mouse pointer over it
2. Click the **menu** button
3. Click **Edit**
4. The editor will appear
5. Edit the content
6. Click **Save**

## Adding an image

**Tip**. It is recommended that images are resized before being uploaded into Etelligent. This helps reduce the download time for the recipients. In some instances, there may be a suggested size, where there is not, it is perhaps useful to know that the email templates are typically only 600 pixels in width.

1. Select the component you wish to edit
2. Click the **menu** button
3. Click **Edit**
4. If the **Form Editor** appears, there should be a field with a button called 'Asset Manager' – use this to browse/upload an image.

   If the **Graphical Editor** appears, continue on with the following steps:
5. Position the cursor where you wish the image to appear
6. Click on the **Image Manager** button
7. Navigate to the folder you wish to add the image to (click **Upload** to upload an image from your computer[1])
8. Click on the *image name*
9. Click **Insert**

## Creating a hyperlink to a web site page

1. Select the component you wish to edit
2. Click the **menu** button
3. Click **Edit**
4. Highlight the text or image that you wish to link to web site page
5. If using the **Form Editor**, click on the **Insert Link** button.

   If using the **Graphical Editor**, click on the **Hyperlink Manager** button and complete the form that appears:

   **URL**
   The URL of the web site page. Select e.g. http:// or https:// as appropriate. Complete the URL e.g. www.beingonline.co.uk

   **Target**
   Specifies whether the linked page will open in a new window or replace the existing page.

   **Tooltip**
   The reference for the link. This is sometimes displayed when the mouse pointer comes to rest over the linked text/image (browser dependent). Note: this is especially important in identifying the link in *Reports*

## Creating a hyperlink to a PDF/Word document

1. Select the component you wish to edit
2. Click the **menu** button
3. Click **Edit**
4. Highlight the text or image that you wish to link
5. If using the **Form Editor**, click on the **Link to file** button to launch the Document Manager.

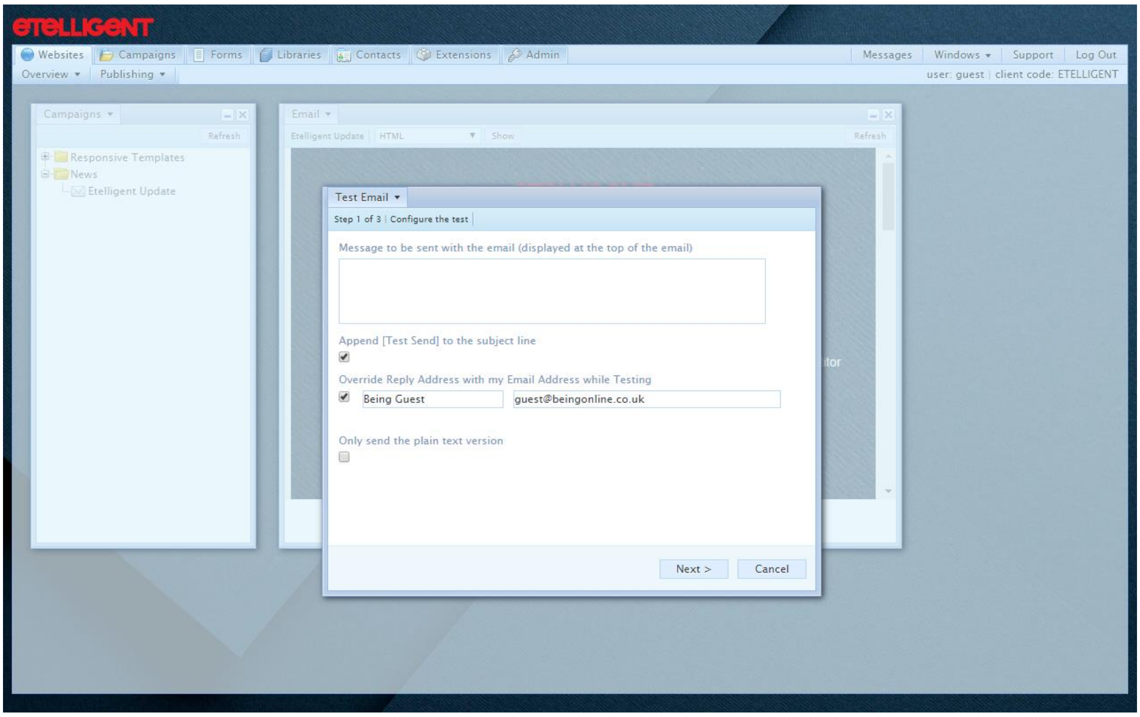
   If using the **Graphical Editor**, click on the **Hyperlink Manager button** and click on the paperclip icon to launch the Document Manager
6. Navigate to the folder you wish to add to document to (click **Upload** to upload the document from your computer)
7. Click on the *document name*
8. Click **Insert**

# Test the email

Sending an email is as easy as clicking a button. Emails can be sent to individuals or groups i.e. Mailing Lists. Emails get added to a queue to be sent. A time that the email should not go out before can be specified.

Before sending an email out to a large group it is recommended that the email has been sent to yourself or a test group for sign-off

1. Click on the **Campaigns** tab
2. Click on **Overview**
3. Click on View Campaigns
4. Use the plus icons if necessary to navigate to an email you wish to edit
5. Click on the *name* of the email
6. Click on **Edit**. This will open the editing window
7. Click on the Window Title Button
8. Click on Test Email
9. Complete the form

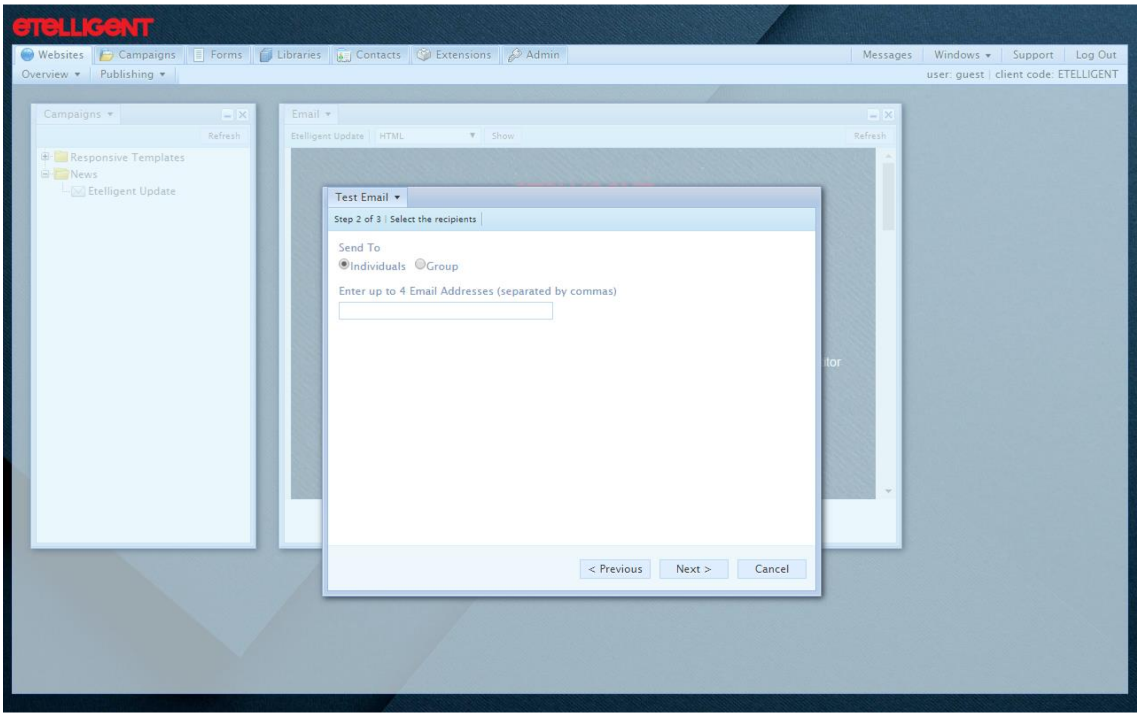



**Message to be sent with the email (displayed at the top of the email)**
Text entered here will appear at the top of the email when it arrives in the recipient's inbox. This can be used to include a message requesting sign off for an email. For example, 'Here is the email for your approval'.

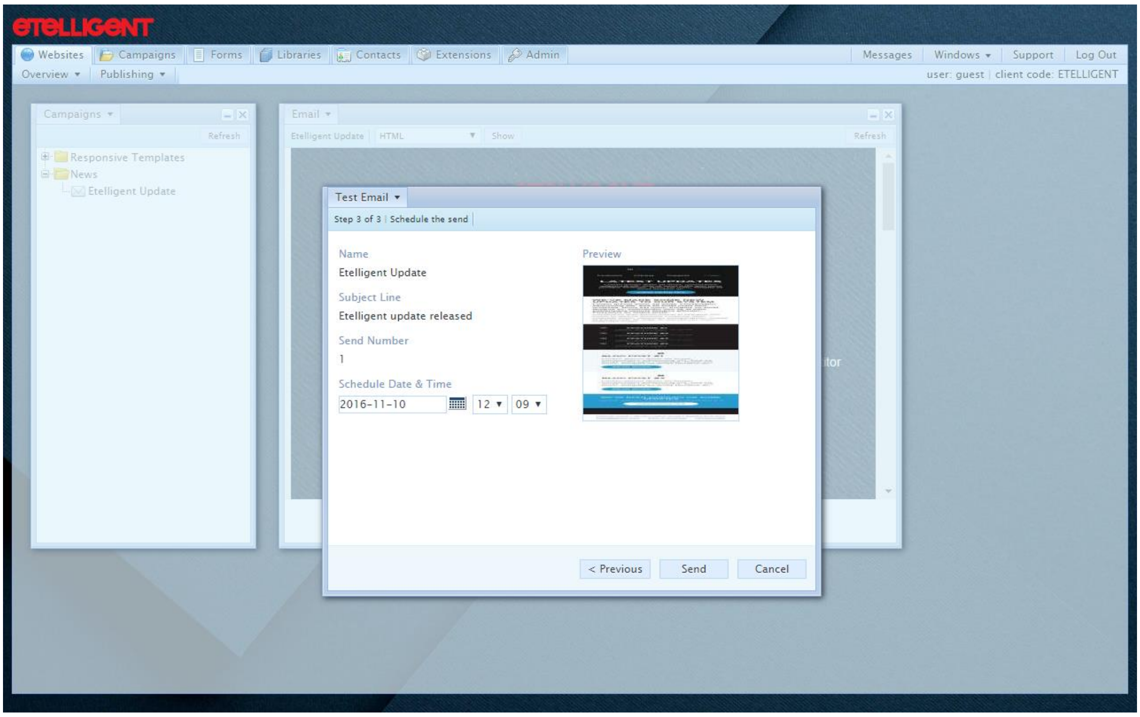
**Append (Test Send) to the subject line**
This is checked by default and is used to append '(Test Send)' to the subject line so that the recipient is aware that what they have received is not the one that has gone to the 'live' list.

**(Only send the plain text version)**
As each email has two parts to it: HTML and plain text, it is possible to send only the plain text version. Some users may opt to receive only plain text versions owing to their devices

10. Click **Next** >
11. Click on Individual and enter an email address




12. Click **Next** >
13. Select a time for this test of the email to be sent and click **Send**



# Upload a contact list

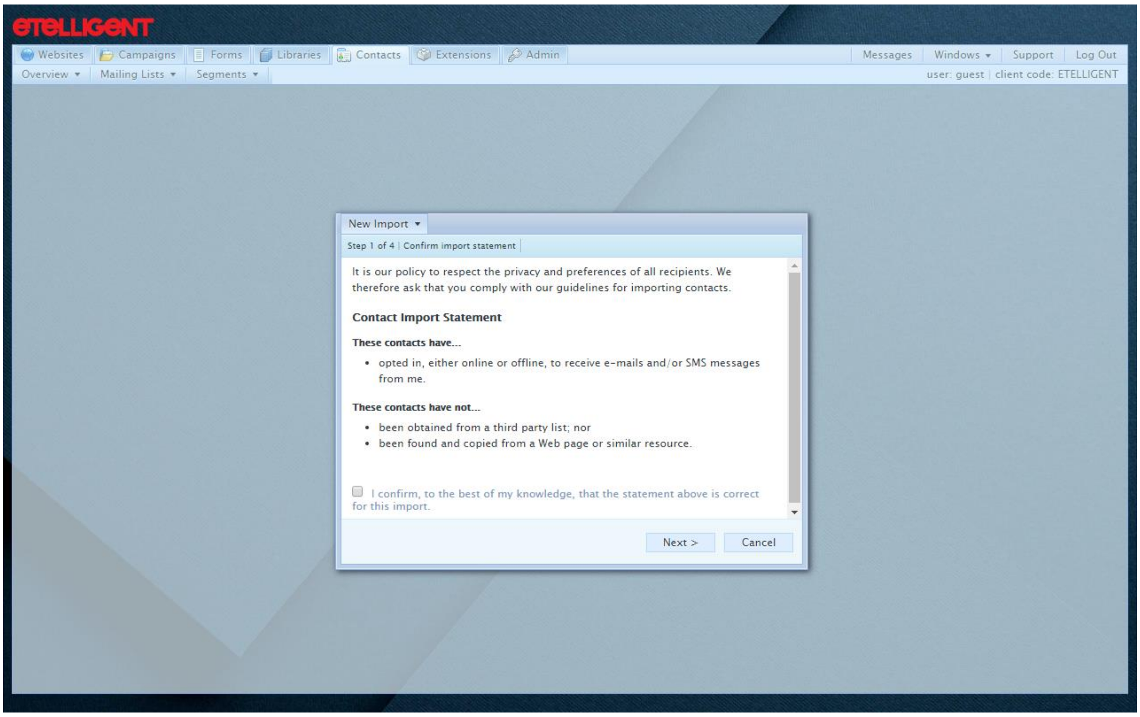
A Mailing List is used to identify a group of contacts that you wish to send messages to.

Contacts can be added to them by importing the contacts from an external file e.g. Microsoft Excel spreadsheet, or they can be added via a Registration Form.

Mailing Lists can have segments applied to them to select a sub-set of the Mailing List.

## Importing Contacts

1. Click on the **Contacts** tab
2. Click on Mailing Lists
3. Click on New Import
4. Step 1 requires the import statement to be confirmed




5. Click on 'I confirm, to the best of my knowledge, that the statement above is correct for this import' if you are agreeable to the terms
6. Click **Next** >
7. Step 2 specifies the file containing the contacts

9. Complete the form:

   **Source file to import contacts from**
   The file to import the contacts from.

   > **Tip**. The recommended format is Microsoft Excel (97-2003). This is denoted with the .xls suffix. **Etelligent does not support importing documents with the .xlsx suffix.**

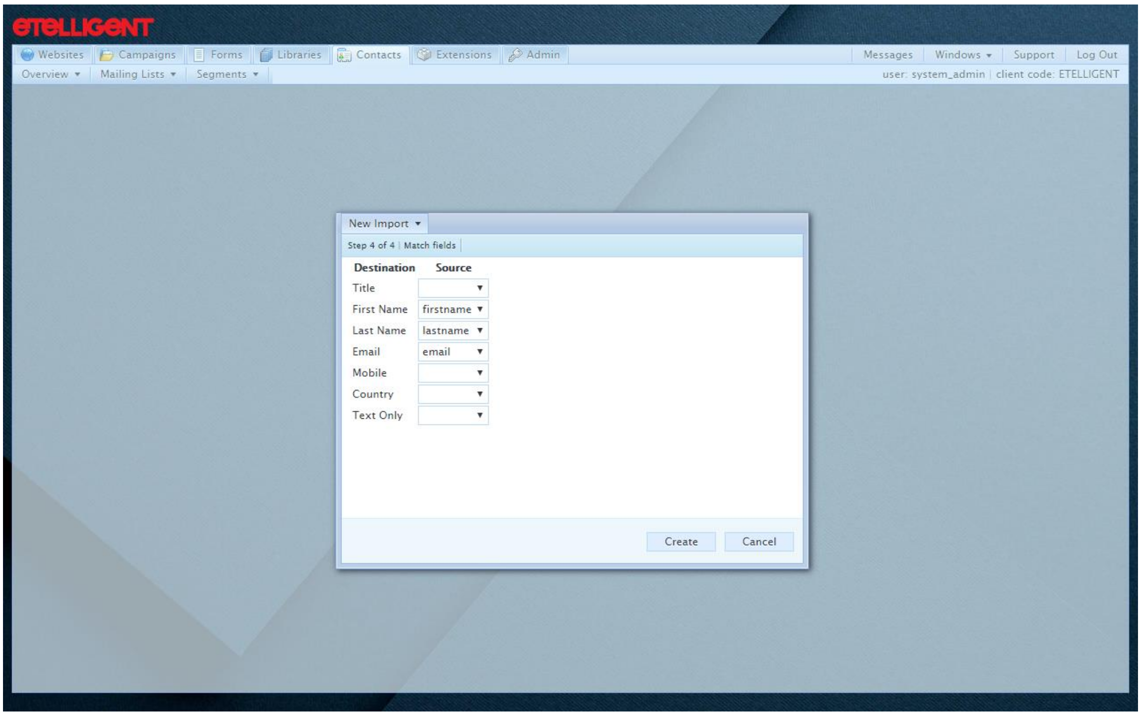
10. Click **Next** >

11. Step 3 specifies which sheet to import from and which Mailing List to import to
12. Complete the form:

    Source Table/Sheet to import from
    Specifies the worksheet to import the contacts from. Note: Microsoft Excel allows for multiple worksheets. In most cases this will be 'Sheet1$'

    Destination Mailing List to import into
    Specifies the Mailing List to import the contacts into

12. Click **Next** >
13. Step 4 specifies the matching of the columns in the e.g. Excel spreadsheet to the fields in the contact's profile
14. Complete the form




    Destination
    Specifies the contact fields to import the contacts into

    Source
    Specifies the e.g. Excel spreadsheet column headings to match against the destination fields.

15. Click **Next** >
16. Step 5 specifies whether or not a segment should be created to identify this import
17. Complete the form:

    Create Segment
    Specifies whether or not a segment should be created to identify this import

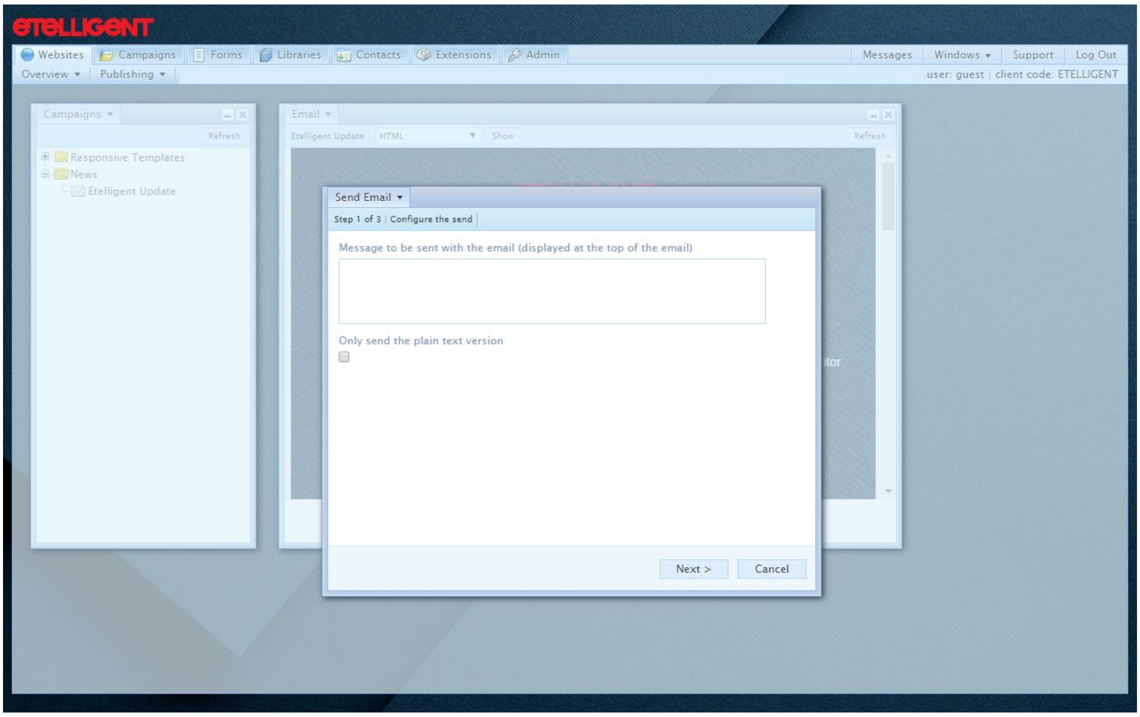
18. Click **Create**

# Send the email

Sending an email is as easy as clicking a button. Emails can be sent to individuals or groups i.e. Mailing Lists. Emails get added to a queue to be sent. A time that the email should not go out before can be specified.

Before sending an email out to a large group it is recommended that the email has been sent to yourself or a test group for sign-off

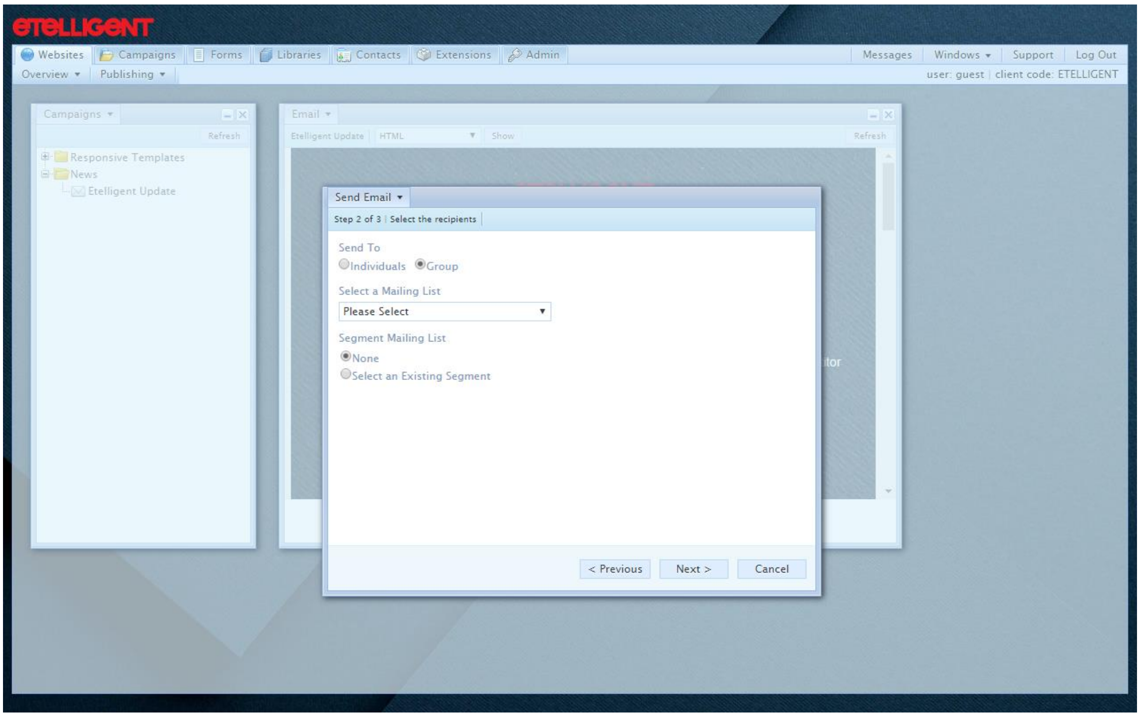
1. Click on the **Campaigns** tab
2. Click on Overview
3. **3. Click on** View Campaigns
4. Use the plus icons if necessary to navigate to an email you wish to edit
5. Click on the name of the email
6. Click on **Edit**. This will open the editing window
7. Click on the Window Title Button
8. Click on Send Email
9. Complete the form



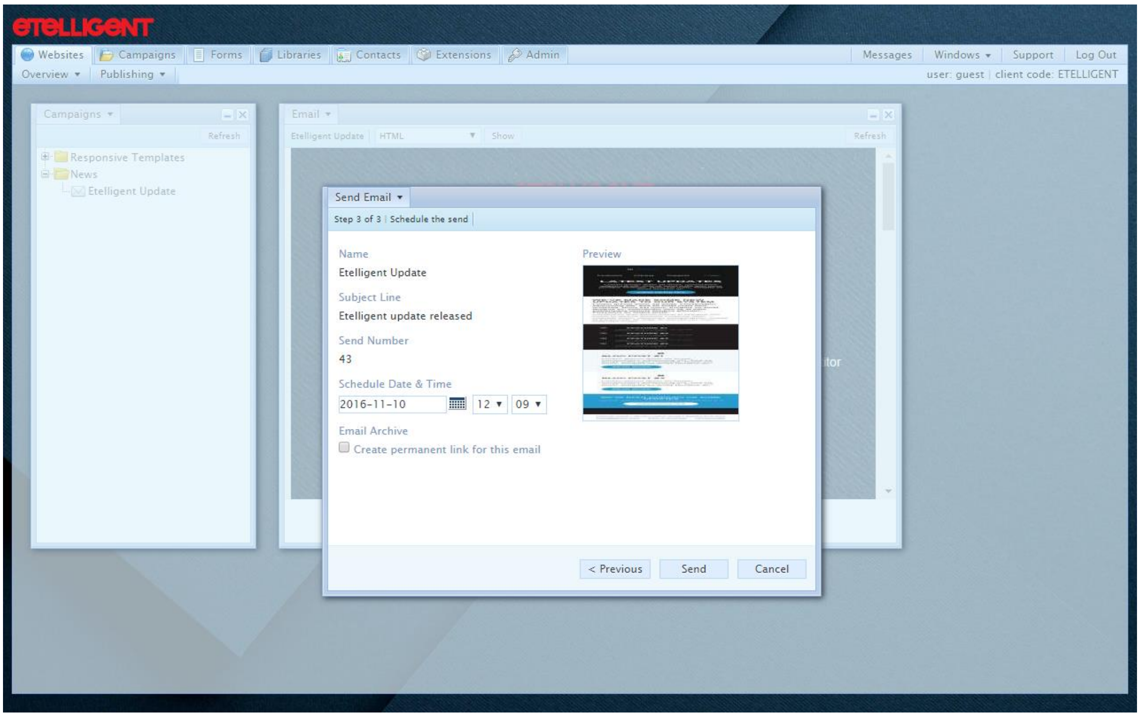

**Message to be sent with the email (displayed at the top of the email)**
Text entered here will appear at the top of the email when it arrives in the recipient's inbox. This can be used if sending to a single recipient as the result of earlier correspondence. For example, 'Here is the information you requested'.

**Only send the plain text version**
As each email has two parts to it: HTML and plain text, it is possible to send only the plain text version. Some users may opt to receive only plain text versions owing to their devices.

10. Click **Next** >
11. Click on Group and select a mailing list from the drop-down list




12. Click **Next** >
13. Select a time for this test of the email to be sent and click **Send**



# View Reports

Reports are useful tools to help review the activity of your contacts and the interaction of your contacts with your email sends.

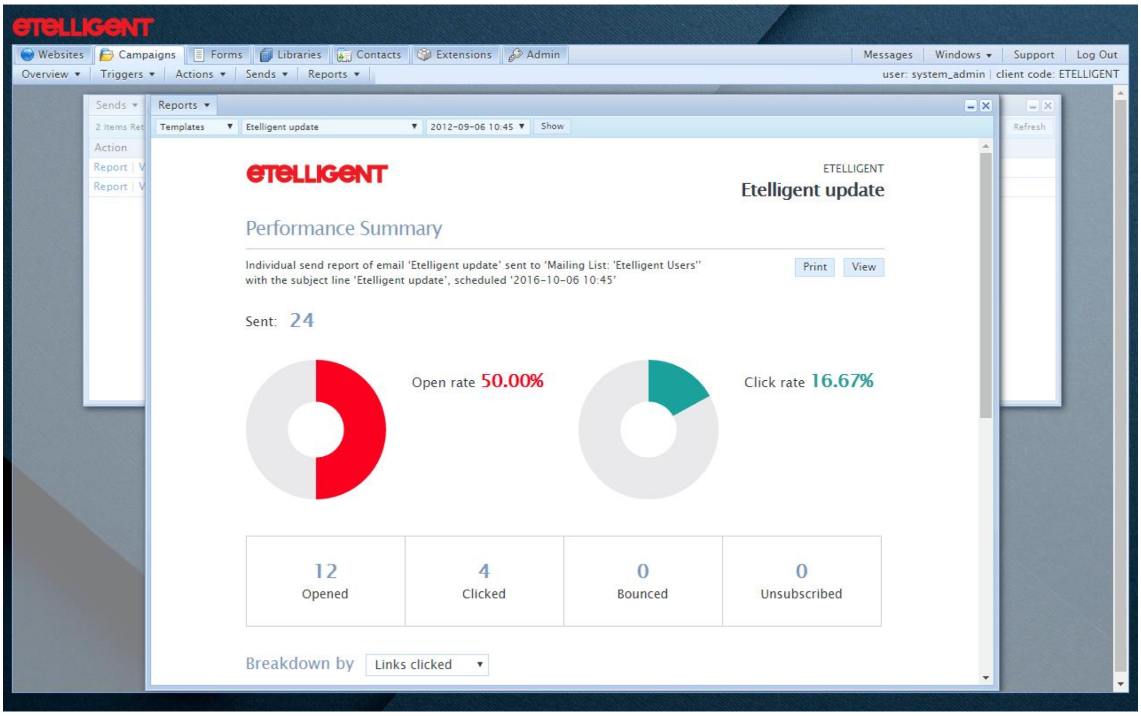
**Email tracking**

Similar to other email marketing products, Etelligent uses an 'invisible' tracking image that gets included when emails are sent. When the recipient opens the email, the request made to the Etelligent server for the image is what is used to record the open. Note, that should the recipient have their preference set to not show images, then the system cannot record the open, unless they subsequently click a link, in which case Etelligent logs an open as well as a click.

## Generating a report for a single email send

1. Click on the **Campaigns tab**
2. Click on **Sends**
3. Click on View Queue
4. Click on **Report** beside the send

**Tip**. Uncheck the Test checkbox and click on **Find** to filter out the test sends. This makes it quicker to navigate to the report for a live send.




**Tip**. Click on the numbers in the Opened, Clicked, Bounced, Unsubscribed boxes to launch the Working Data window. Clicking on its window title button will give you the option the export the contacts in a CSV format readable by Microsoft Excel.

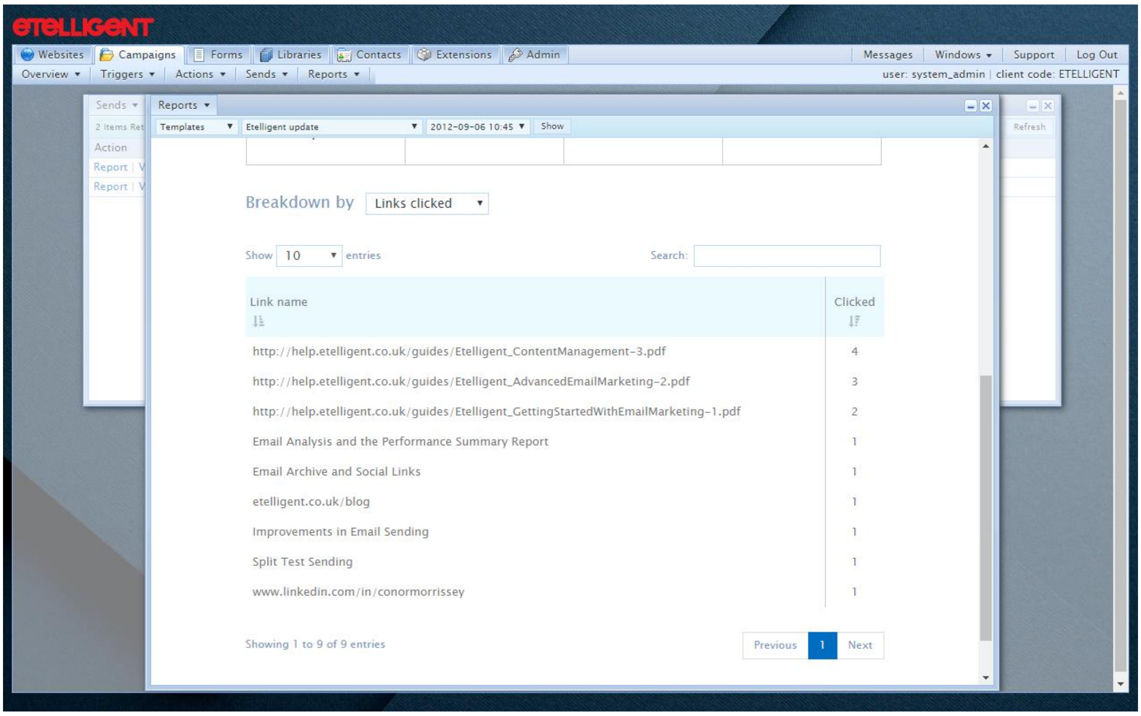
5. Click on the **Breakdown by** drop-down menu to view the behaviour of the contacts. Metrics included:

   Links clicked
   All the links in the email that were clicked ordered by the most popular

   Email client
   The email client the contact used to read the email. Examples include Outlook 2016, Outlook 2013, iPhone etc.

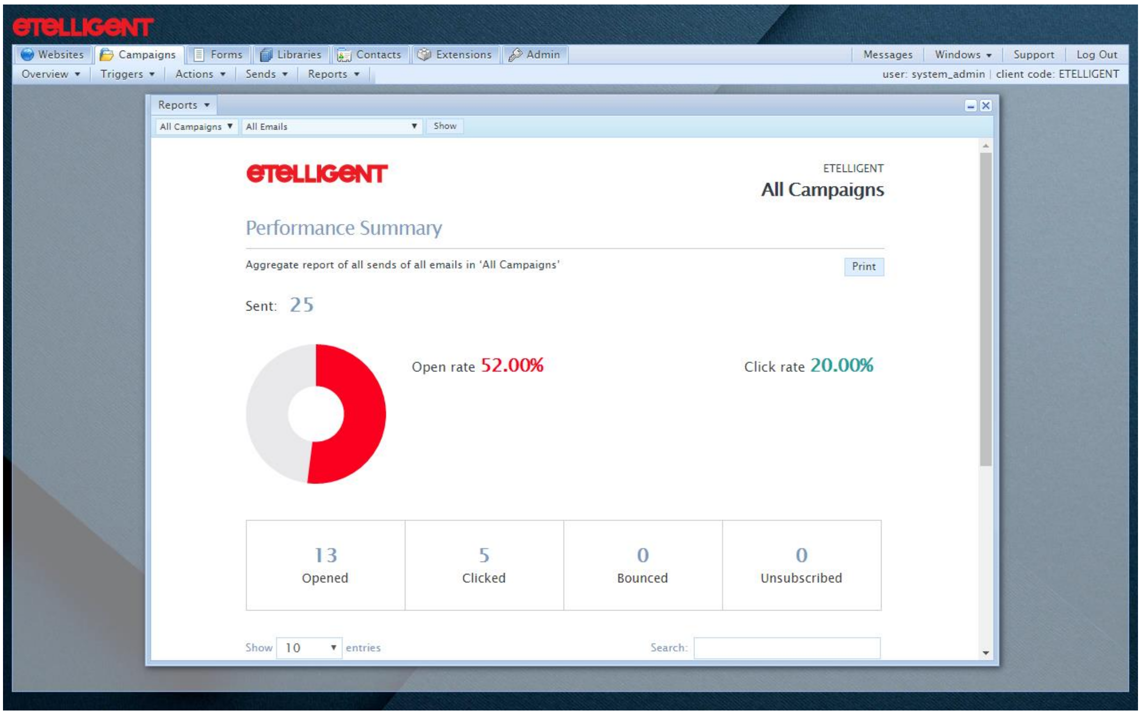
   Engagement
   The length of time the user spent reading the email.

   Geolocation
   Using the IP address that was recorded when the user opened the email, a geographical location can be associated with the open. Note, however that, owing to network routing on internal networks this can be misleading as it shows when the IP address of the machine that joined the Internet is location rather than a GPS based location.



## Generating an aggregate report showing all sends

1. Click on the **Campaigns tab**
2. Click on **Reports**
3. Click on View Performance Summary




4. Read the figures at the top of the report to discover the aggregate figures for all sends

> **Tip**. The figure at the top beside Sent shows the total number of emails that have been sent with the system.

5. Scroll down to see all the single email sends

> **Tip**. Clicking on the title of an individual email in the list of sends will open the single email send report for that email.

# Support

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