

Setting up your first message

In this chapter, you will bring together all of your content into an email message. A message will contain your envelope information, content and provide testing features for you to ensure you are providing a well crafted email.

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Introduction to the Message Builder

The CONNECT Message Builder allows you to craft and test the email content you plan to send to your recipients. It takes you through a 6 step process with a wide variety of options, editors and testing tools to make your email campaign successful.

Details - This is the overall settings for your message. You can adjust the name, campaign, content editor, template and additional dynamic settings on this step.

Envelope - Create and set your From/Reply-To addresses as well as your subject line from this step.

Content - Using your editor of choice, craft the HTML version of your email message.

Text - Generate and edit the alternate text version of your email message.

Preview - Preview your content to ensure it meets your requirements.

Click Tracking - Review the links being tracked and update the friendly names being used for reporting/segmentation.

Test - Send test versions of your email message to yourself and other recipients.

Envelope Information

From Address/Reply-To Address

The From Address is one of the most important parts of your email campaign. It identifies who you are to not only your customers but the ISP's (Gmail, Hotmail, etc.) as well. And with any identity, it also indicates your reputation in the space as well. If you are a proper email sender who follows all the rules, or a spammer who they should block.

Below we will discuss specific parts of the from address that might help you decide what to use.

The Sending Domain



- The Sending Domain holds your identity. Consider it your passport to the email space, it holds where you've been and you need it to get where you want to go.
- You can also configure this domain to use special records that, if used properly, will confirm to ISP's that you are a legitimate email sender.
- The domain is the last half of your email address, that piece after the "@" symbol.
- For example, if your email address is "support@umpiredigital.com", then your domain would be "umpiredigital.com".

The Local Part



- The Local Part of your from address is more for show and can be used to identify the type of email that they will be receiving or what to expect from that address.
- In most cases, email senders use things like "email@" or "newsletter@". One thing to stay away from is "info@".
- This type of address is commonly flagged as Junk in a lot of Junk Filters in products like Hotmail or Outlook.
- You can also use something more personal if your email calls for it, like "Jennifer@" and so forth.

- The great thing about the Local Part in email sending in CONNECT is that the Local Part can be whatever you want it to be, even if it's not a valid email address.
- The important piece for you to be able to send is the Sending Domain and this must be set up by CONNECT Support in order for your emails to be deployed.

Subject Line


The subject line of your email should entice recipients to open your email. It's the first thing they see in their inbox and can make or break your readership.

Use the personalization options available to you next the subject line input to add a personal and target touch to your subject line and entice the user to open your email.

Updating the content

The Content step is where you will spend most of your time when building your message. It is where you provide the HTML content that will be sent to your contact list. While we also offer a WYSIWYG editor or Code editor, we will be covering the Drag and Drop editor in this tutorial.

Tutorial

Please note: To try out the feature, click the full screen icon  in the tutorial.

<https://www.iorad.com/player/132959/How-to-create-a-message-with-Drag---Drop-editor?src=iframe>

Generating the text version

Why do I need a text version?

The text version provides a non-HTML code version of your email to the end-recipient. This version is used by some screen readers for the hearing impaired as well as any recipients who do not allowed HTML emails to be viewed.

Finally, spammers tend to not worry about the text version so it's absence can be a red flag to email providers like Gmail so we make it a mandatory step in CONNECT to ensure you get the best results for your email campaigns.

Instructions

We've made it super simple to generate the content for your text version. We recommend doing this after you have finished the HTML version of your email.

Click the "Generate text version" button and edit as necessary



Tracking opens and clicks

One of the many benefits of email marketing is its ability to easily track the user's engagement and interest in the content you send them. Two very common things to track in email is if the recipient opened the email and if they clicked a link in your email.

CONNECT makes setting up this tracking extremely easy and uses that tracking to provide some great reports on your email's success as well as the capability to segment your contact list based on their engagement.

Open Tracking

CONNECT automatically applies open tracking to your email content so no additional step required here. When open tracking is applied, an invisible 1 pixel image will be placed at the bottom of your HTML code that when loaded, will tell CONNECT that the recipient has opened the email.

This brings up one caveat with open tracking. To log an open, the user must display images in their email. Some email clients do not automatically display images, so if the user does not opt-in to display images, an open won't register.

With that said, CONNECT combats this by assuming an open when a click occurs, ensuring your open rate is accurate.

Click Tracking

CONNECT also scopes out each link in your HTML content and applies tracking automatically. When click tracking is applied, the URL in your link is replaced with a unique redirect link generated by CONNECT. When the recipient clicks on the link, the click is recorded for that specific link and then the user is redirect to the intended page.

There is however, one extra (optional) step you may want to consider when setting up your message. CONNECT offers you the ability to provide friendly names for your links. Names are automatically generated based on the text of the link or the ALT text of the image you have link but sometimes you might have 10 links with "click here" as the text. This will make it challenging to determine which "click here" the recipient clicked on without looking at the full URL. CONNECT solves this by allowing you to name the link uniquely.

Follow the instructions below to name your links.

Update the Link Names to reflect what they are naming



- **Tip:** Use a name that describes not only what the link is but where the link is in the message.
- This works effectively when you have the same link text or image (ie. Click Here) in multiple locations in your message and need to separate them out in reporting.

Save your work once finished

Changed link names will be highlighted in yellow



Testing your email

Preview

Previewing a message is a great way to verify the message you are about to use is correct and to instantly see the changes you have made to the message without the editor in the way.

This step is especially useful if you are using personalization/dynamic content as it provides a great way to verify that the logic and variables you used will work with the data you have collected for your contacts.

You can also view your envelope information by clicking on the "Envelope" expanding area above the preview pane.

If you **do not have** any personalization/dynamic content in your first email, simply use this step to proofread your content and move on to "Send Test Emails" below.

If you **do have** personalization/dynamic content, trying the following options:

Enter test values manually

We recommend trying to type in a few different values, some in ALL CAPS, some in all lowercase, to see how your content reacts to the data.

Click "Refresh Preview" to apply the data to the template.



Try selecting a contact you have to use real data



When selecting contacts, you have access to the following options:

DataMart fields - Add/remove different DataMart fields from the contact grid on the right side of the screen to see additional data and use filtering/sorting to find the contacts you need.

Select contacts - Click the checkbox next to the contacts you want to use for previewing.

Click "Done" when you have selected the contacts you want. Then click the contact you want to use for previewing and it will load their data into the fields.

Click "Refresh Preview" to update the template.

Send Test Emails

Testing your messages is a very important process in quality assurance. We recommend thoroughly testing every message that you set up. Below are the steps necessary to send out test messages.

Selecting your recipients

By default, CONNECT allows you to send a copy of your email to the email address associated to your user account. You can also add in additional recipients to receive the test message.

We recommend starting with "Test recipients" as you can set them up right within the message instead of navigating to the Target screen (Stakeholders/Test Accounts)

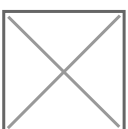
Managing test recipients

To get started, we'll add one test recipient for you to test with.

1. Click the "Manage test recipients" button
2. In the pop-up window, click "Add recipient"



3. Fill in the fields provided (Some fields can be left blank if required. The email field is required.)
4. Click "Finish" (Or feel free to keep adding more if needed)
5. Click "Done"
6. Select the recipient(s) you added to receive the test message



Ignore the other settings for now. They will be covered in greater detail later.

Type in a Prefix for the Subject Line to Track Versions

Although this step is technically optional, it's a step we recommend you get in the habit of using, especially if you are sending test messages to multiple people and expecting feedback.



- This option allows you to save a value in the Test step so that if you make changes later, you can change the version and that version will appear in the subject line.
 - **Example:** Test - V1 - Subject line goes here

Finish by clicking Send

