

The Deploy Screen

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How to Deploy to a List File(s)

For users who do not wish to deploy to segments and simply wish to deploy to a List File they have uploaded, follow these instructions.

1. Click the "Create New Deployment" button under the Deploy tab

Click the "Create New Deployment" button under the Deploy tab

2. Select the Campaign and then the Message you wish to deploy



3. Select the Subscription you wish to deploy with



- This will determine the Unsubscribe and Hardbounce data that your lists will be cleaned against before deploying
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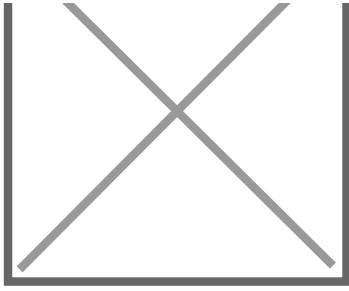
4. Click  and it will display a pop up.



5. Remove Duplicates



- When selecting  next to



, a drop menu will display the DataMart fields.

- Select the field from which you wish to remove duplicate data.

6. OPTIONAL -- Select any Stakeholders you wish to include in this deployment



- This is a great way to receive a copy of the final message so you can see the same message your customer did.
- Also, the benefit of including yourself or others here is that they are not included in the analytics later on so your results are not skewed.

7. Select whether you would like to deploy now or at a scheduled time




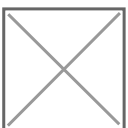
- If you choose to schedule, ensure the Time Zone is set correctly.
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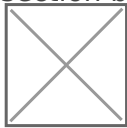
8. Click  to continue.

9. Review all details of the deployment to ensure accuracy



11. Click  to view a list of all the recipients of mail.



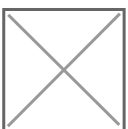
- It is possible to view more information about each record by including more Datamart fields from Not Shown section to Shown section by simply clicking on  sign and the action could be reversed by clicking  sign. (Example shown below).
- Moreover, in case when dynamic variables are included in the message, all those fields are automatically displayed in the view section.



10. Click to Deploy



11. View your Deployments



- **Active Deployments**

- These are highlighted in green to indicate that they are live or paused deployments. Under "Status" you will have access to 3 different actions:

- **Pause** - This will allow you to put the deployment into a "paused" state so that it can be resumed later. Any recipients still in the deployment queue will still be sent to.

- **Cancel** - This will allow you to cancel the deployment completely. Any recipients still in the deployment queue will still be sent to.

- **Play/Resume** - This action allows you to start/resume the deployment. This action only appears for paused deployments or delayed deployments past their scheduled date/time

- **Scheduled Deployments**

- These will not be highlighted in any colour, but they are labelled "Scheduled" and have actions next to them. Under "Status" you will have access to 3 different actions:

- **Delay** - This will allow you to put the scheduled deployment into a "delayed" state so that it can be rescheduled later. A "delayed" deployment will not deploy even if the scheduled date/time has been reached.

- **Cancel** - This will allow you to cancel the scheduled deployment completely. The deployment will disappear from the grid.

- **Reschedule** - This action allows you to reschedule the deployment for the date/time it was originally scheduled for. This action only appears for delayed deployments and delayed deployments that are not past their scheduled date/time. If the current date/time is past the scheduled date/time, it will change to the Play/Resume action and the row will turn green. It allows you to reschedule the deployment

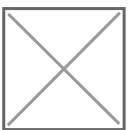
How to Deploy to a Segment(s)

The final step to launch your campaign. This tutorial will walk you through all the steps in setting up a deployment to a segment.

1. Click the Create New Deployment button

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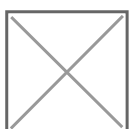
2. Select the Campaign you wish to deploy



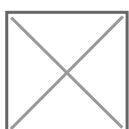
3. Select the Message you wish to deploy



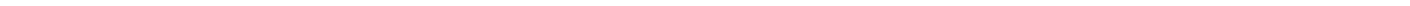
4. Enter the Deployment Name you prefer to use



5. Select the Subscription you wish to send under



- Alert: This will determine which Unsubscribes are removed from the Segment you have selected.



6. Click the "Add" button beside each Segment

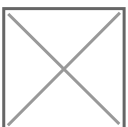
Click the

- **Note:** You can add or remove as many segments as you wish.
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7. OPTIONAL: Including Stakeholders

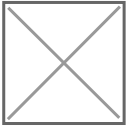


8. OPTIONAL: Suppress Records from Deployment



- Click on the Exclude Segments button then click on the Add button next to each segment you wish to exclude.

9. OPTIONAL: Schedule a Deployment



- Select "Deploy On" and adjust the time and date to when you would like the message to deploy.

10. Click the tab

11. Review the deployment details and click Start deployment now

Review the deployment details and click Start deployment now

- **Alert:** This window is very important as it allows you to double check every aspect of your deployment. Make sure to spend a few minutes on this screen before hitting the "Start Deployment Now" button.

How to Setup an AB test with a Rollout

In this lesson, we will cover how to setup a subject line or content AB test that sends the winning version to a rollout group. A "rollout group" is a chunk of the list of contacts you want to send to, that you put aside for after the test. This allows you to run the test on a sample of your contacts, determine which version is the winner and then send that winning version to the rollout group you put aside. This ensures that you are sending the most effective version of your message to the majority of your list.

Setting up an AB Test requires a working knowledge of CONNECT and its basic features. Before reading this article, we recommend that you review the following articles:

- [How to Set Up a Message](#)
 - [How to Upload a List](#)
 - [How to Set Up a Deployment](#)
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1. Creating an AB Test Message

Creating an AB test message

To create an AB test message follow the below instructions :

1. Click on Compose
 2. Hover your mouse on " Create a message"
 3. Click on A/B Test
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2. Setting up the Message

Setting up the message

- The process for setting up your AB Test message is very similar to the regular process for setting up a standard message except that you need to define the Test Type and where you wish to get the HTML of your message from.
1. **Test Type:** Subject line This will allow you to define and test various subject lines with the same HTML template. Content This will allow you to define and test various versions of your template with the same subject line.
 2. **Using HTML from:** This feature allows you to grab the HTML code from a Template or an existing Standard message and use it for the AB Test message. If you are setting up a Content test, it will appear as the first version of your content.
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3. Subject Line A/B Test Message

Subject Line A/B test message

- To define your subject line versions, navigate to the Envelope tab where can define up to 10 different Subject line versions.
 - For each subject line, you can take full advantage of the Dynamic subject line feature and add in personalization or logic to test different subject line scenarios.
 - To add a new version, simply click on the "+" icon. You can also remove versions by clicking on the "œœ icon.
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4. Content A/B Test Message

Content A/B test message

- To define your content versions, navigate to the HTML tab where you can define up to 10 different Content versions.
 - Content versions require a few extra steps in order to create each version.
 - To add a content version, click on the “+” icon next to version changer.
 - A dialog will appear that will ask you to either copy the HTML from an existing version, from a Template, or an existing Standard message.
 - For each version, you will also need to create a text version on the Text tab.
 - Finally, you have option of define different link names for each version on the Click Tracking tab.
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5. Previewing each Version

Previewing each version

- The Preview tab provides a great opportunity to view each of the different versions of your AB Test message.
 - By selecting the version in the drop down menu, you will be able to preview each version of the subject lines or content.
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6. Sending Tests of each Version

Sending tests of each version

- Another way to test the versions of your AB Test message is on the Test tab.
- You can select which versions you would like to send to each of the recipients you select (including yourself).

7. Setting up a Deployment

Setting up a deployment

- Now that you have set up your message, you can start setting up the AB Test Plan. To start, navigate to the Deploy section, click on the AB Testing tab and click on "Create New A/B Test".
- The first step of the set-up process will look very similar to the set-up of a regular deployment. The difference here is that you need to provide a name for your Test Plan.
- We have also introduced a new feature where you are able to save and return to an AB Test Plan set-up as long as you define a "Test Name" and click "Create Test Plan".
- However, in order to move on to the "Test Plan Builder" step, you must define the message and the target before it will become available.
- To finish off this step of the set-up, select your AB test message, define your target and choose your option for scheduling.

8. Setting up your sending Strategy

Setting up your rollout group

- Once you are on the Test Plan builder step, you can review the versions from your AB test message and the total size of your target before you split it into test and roll-out groups.
 - To get started, select "Rollout" from the Sending Strategy drop down.
 - This will cause a slider to appear where you can change the splits for your test groups, ultimately affecting how large your roll-out group is (in red).
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9. Reminder Notification

Reminder notification

- Another option you have when setting up a test plan with a rollout is to set a reminder notification so that you are reminded that you need to launch a winning version to your rollout group.
 - To set up the notification, define when you want the notification sent after the test groups have been sent to.
 - You also have access to a few extra options that will affect the notification.
 - Include a recommended version for sending to the rollout group in the notification based on Open rate, Unique click rate, or Unique click rate as % of opens.
 - Repeat the notification until a winner is chosen. Selecting this option will cause the notification to be sent again and again at the interval you set until you select a version to send to the rollout group.
 - Send a notification to other stakeholders by default, the notification will be sent to the user that created the AB Test Plan but you can also include other stakeholders so they get the notification as well.
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10. Deployment Review

Deployment Review

- The deployment review step will allow you to review everything before you begin the test plan.
- Just as a reminder, when you “Start” the test plan, only the version or “Split” groups will be sent to.
- The Rollout group will not be deployed to until you select a winning version.
- Toggle between version to preview the different data points. Preview splits in count by version.

11. AB Test Plan Review

AB Test Plan review

- After launching the AB Test plan, you will be taken back to the Deploy section.
- From here, you can : See the status of your AB test Click on the test plan name to view your test plan.

How to View your Test Plan

1. Test Plan

Test Plan

- Click on the test plan to view the details of the deployment test plan.

2. Test Plan Break Down

Test Plan Break Down

1. Summary of your test plan
2. Analytics for each version
3. Reminder Notification Setup

3. Reminder Notification

Reminder Notification

Another option you have when setting up a test plan with a rollout is to set a reminder notification so that you are reminded that you need to launch a winning version to your rollout group.

1. To set up the notification, define when you want the notification sent after the test groups have been sent to.
2. You also have access to a few extra options that will affect the notification. Include a recommended version for sending to the rollout group in the notification based on Open rate, Unique click rate or Unique click rate as % of opens.
3. Repeat the notification until a winner is chosen Selecting this option will cause the notification to be sent again and again at the interval you set until you select a version to send to the rollout group.
4. Send a notification to other stakeholders By default, the notification will be sent to the user that created the AB Test Plan but you can also include other stakeholders so they get the notification as well.

4. Deployment Snapshot

Deployment Snapshot

- This snapshot informs you on the different key metrics in real time .

5. Test Plan Summary

Test Plan Summary

1. By clicking on the preview button in the sending strategy section, you will be able to preview the reminder notification that was used before the deployment.
2. The preview button in " details" links to the message preview.

6. Choosing a Winner

Choosing a winner

- Once your AB test deployed successfully, you will get an email notification asking you to choose a winner.
- As seen in the illustration on the left side, the status informs us that a winner is needed.

7. Choose a Winner

Choose a winner

- Once the link " Winner needed " is clicked , a pop window will display informing us on the different stats for each version such as :
 - Open Rate Unique Click Rate
 - Unique Click Rate as a % Opens
- A winner recommendation can be made based on the above metrics as well.

8. Winner Options

Winner Options

- The recommended winning version will be highlighted in blue as shown above. Once the winner is determined and select , you have 2 options :

- Select " Start rollout deployment now " for immediate delivery
- Select " Deploy on " and choose the date and time for a scheduled delivery

How to Remove Duplicates from your Deployment List

There may be situations where you need to remove additional duplicates from your deployment target based on a DataMart field other than your UniqueID. This process shows you how to select a non-UniqueID field to remove additional duplicates from your deployment target. This process is for removing duplicate email addresses when you have a non-email UniqueID for your community.

1. Remove Duplicates Option

Remove duplicates Option

- When setting up a new deployment, selecting "Yes" next to " Remove duplicates?".This will cause a drop down menu to appear and will display a list of your current DataMart fields.
 - Select the field you wish the system to use to detect duplicates.
 - **Note:** You will not be able to control which contacts are kept as the original contact and which are removed as duplicates.
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2. Duplicate counts on the Deployment Review Screen

Duplicate counts ion the deployment review screen

- Once you have finished the deployment set up and move on to the deployment review screen, you will notice that the field you selected to remove duplicates appears in the Audience Details on the right under “Duplicates”.
- This gives you a count of how many duplicates were removed based on the field you selected.

How to Deploy to a Seed List

1. Final Deployments

Test Plan

- In final deployments, Click on the hyperlinked deployment name.
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2. Preliminary Seed Deployments

Test Plan

- Click on Preliminary Seed Deployments
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3. Add Lists

Test Plan

- In the Preliminary Seed Deployments section, Click on Add in order to add your list.

4. Combining Lists

Test Plan

- When selecting a list, you are able to combine several lists.

5. Recipient Selection

Test Plan

- Click on Select Recipients

6. Deployment Options

Test Plan

- Select your between the 2 deployment options and click schedule
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7. Seed List Deployment

Test Plan

- Your seed list deployment will display on the same page where you will be able to action it just like in a normal deployment.

How to Save Deployments

1. Deployment Creation

Test Plan

- Create new deployment
-

2. Saving Deployments

Test Plan

- Set up the deployment and click save.
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3. Final Deployments

Test Plan

- Your saved deployment can be found in Final Deployments