CAMPAIGNS

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Campaign Setup

Campaigns

This where all your campaigns live you can move items into folders to help keep your campaigns tidy.

Campaign

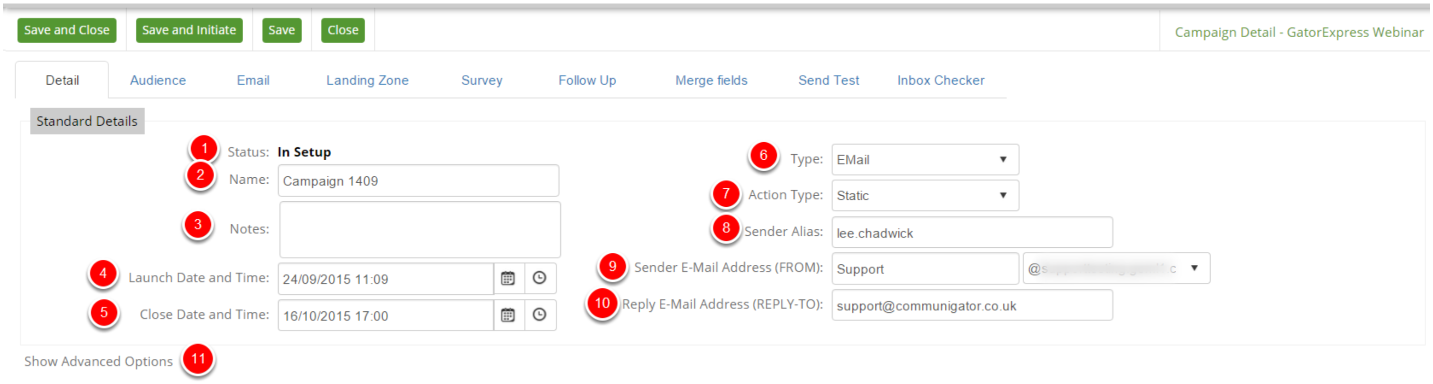
1. This option will hide or show the folder tree.
2. Click here to add a new campaign.
3. Click here to create a new GatorExpress campaign.
4. Click here to use the filter search option.
5. Click here to remove the filter/search you applied.
6. Clicking a letter will show you all campaigns that start with that letter.
7. Clicking here will show you the key to the different status icons.
8. These are the tick boxes for selecting multiple campaigns at once when moving them to different folders.
9. This is the name of the campaign.
10. This is the notes of the campaign, the notes are not searchable but can still be useful.
11. This is the date the campaign was created.
12. This is the twitter button, if you have twitter set up click here to tweet your campaign, once a campaign has been tweeted the icon will be green.
13. The inbox check status will show here along with the icon for split test if your campaign is a split test or the icon for GatorExpress if your campaign is a GatorExpress campaign.
14. This is the status of the campaign stating whether it is initiated or not, use the key (No.6) to see what each one means.

15. This is the initiate button on an uninitiated campaign or the view results button on an initiated campaign.
16. Click here to delete the campaign, deleting a campaign will NOT stop it from sending, please call support if you need to stop a campaign quickly.
17. This is your folder tree.
18. This is your campaign pages navigation.
19. You can select the number of items to show per page.
20. This shows how many items are in the folder that you are currently in and over how many pages.

Campaign - Detail

When you first open the Campaign you are presented with the Detail tab. It is divided into two sections, Standard Details and Advanced Details.

Campaign - Detail - Standard Details



1. This is the Status of the campaign showing if the campaign is in set up or has been initiated.

2. This is the Name of the Campaign, it is visible in the main campaign screen and is searchable from there.

3. This is the Notes of the Campaign, it is visible in the main campaign screen but is not searchable.

4. The launch date and time is the time at which the campaign will start sending once initiated, if this is in the past the campaign will start sending as soon as it is initiated.

5. The close date and time is the time at which no further emails will be sent from the campaign. This needs to be far enough in the future to allow all emails to send out, including follow up emails.

6. There are three types of campaigns, Email, SMS and Follow up.

- Email is the one you will use most often.
- SMS is if the campaign is to send SMS message (the account must be configured to do so)

Follow up removes the audience tab from the campaign as the campaign will get it's audience from the follow up criteria set on another campaign.

7. There are five action types to choose from, Static, Static Recurring, Refresh Non-recurirng, Refresh Recurring and Campaign Series.

- Static - The campaign is initiated once only for the audience available at the time the campaign is run. New audience members, added after the campaign was initiated, who meet the selection criteria or are included in the group will not receive this campaign.
- Refresh Recurring - The Campaign will continue to be run with an interval set in weeks / months (Recurring) and new audience members, added after the campaign is initiated; who meet the selection criteria or are included in the group, will receive the campaign as it recurs (Refresh).

- Recurrence Interval - The number of weeks or months from the start date that the campaign should recur.

- Refresh Non-Recurring - The Campaign is initiated once only for each audience member. New audience members, added after the campaign is initiated, who meet the selection criteria or are included in the group, will receive the campaign (refresh) once only.
- Static Recurring - The Campaign will continue to be run with an interval set in days (Recurring) and new audience members, added after the campaign is initiated, who meet the selection criteria or are added to the group will not receive the campaign as it recurs.

- Recurrence Interval - The number of weeks or months from the start date that the campaign should recur.

- Don't send if received in the last - Any recurring emails will not be sent to a recipient if they have already received an email in the last X weeks or X months.

- Campaign Series - The campaign is going to be part of a Campaign Series and therefore will not have an audience attached to it.

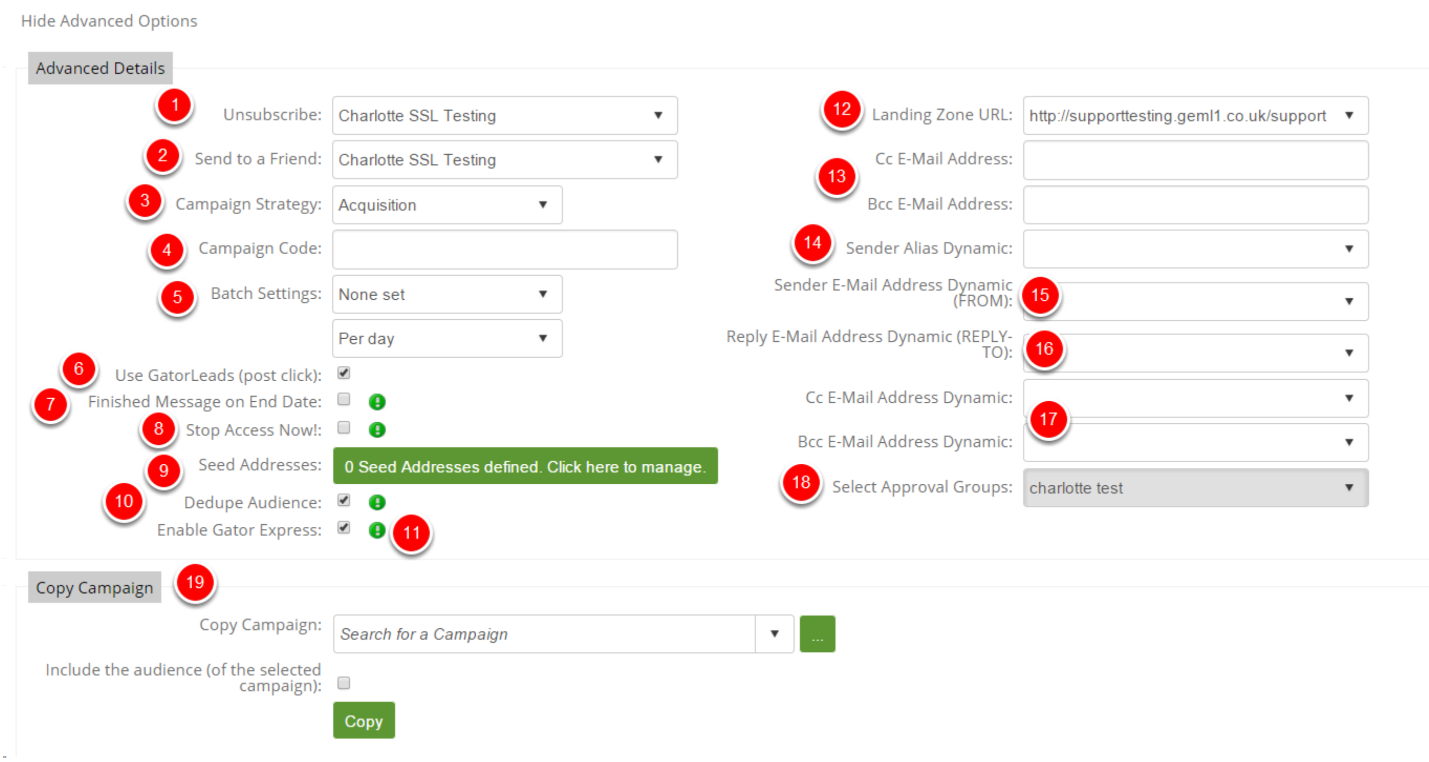
8. The Sender Alias displays in a recipients inbox, this should be a friendly recognisable name for yourself, often a Company Name is used here.

9. The Sender Email address from is displayed in the recipients inbox.

10. The reply to address is the email address that is populated into the recipients TO: field when they hit reply, this is where the replies to the email will be sent.

11. Click here to expand to see the Advanced Details.

Campaign - Detail - Advanced Details



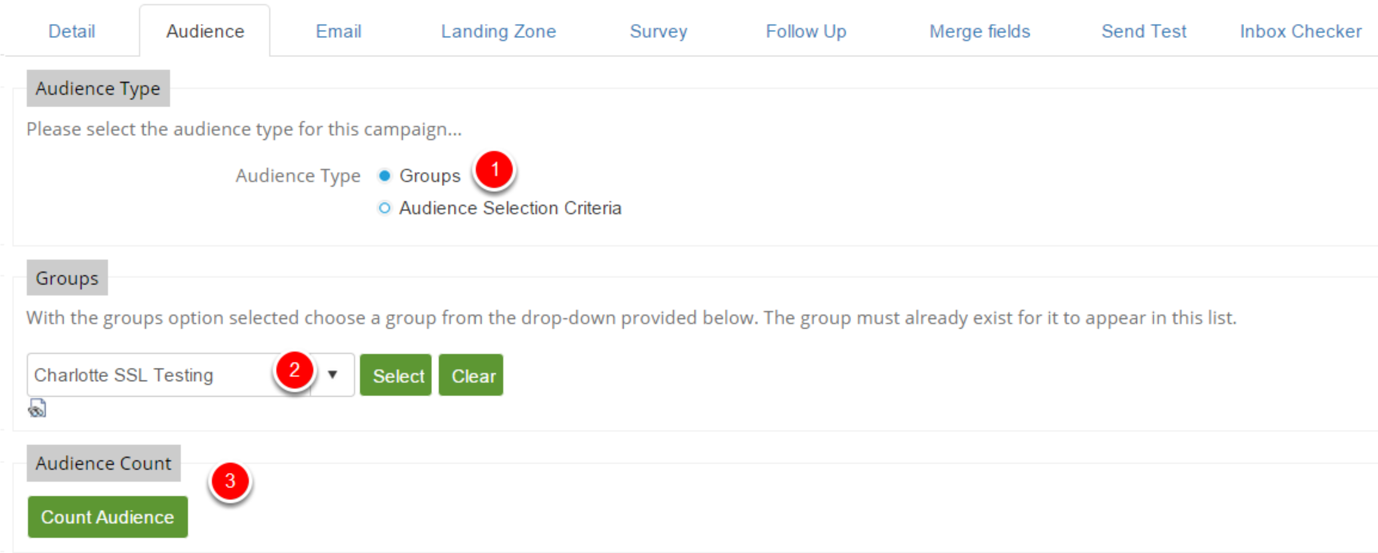
1. This is the Unsubscribe set up that is used when a recipient clicks to unsubscribe.
2. This is the Send to a Friend that a recipient see when they click to send to a friend.
3. This simply allows you to select a campaign strategy of the campaign for reporting purposes. The selection at this time will have no effect and is not visible anywhere else in the product.
4. The campaign code can be passed into links using Query Strings.
5. You can set a campaign to go out in batches, so that the sending is staggered, it works on a 24/7 basis.
6. If you also use WOW you need to ensure this is ticked so that your reporting in WOW is complete.
7. If you wish to have a finished message on links once a close date is reached check this box and then enter a message to be displayed.
8. Stop access now is the 'Emergency Stop' button. Use if an error in a survey or a landing zone is discovered after campaign is initiated. Use the text box to display a, 'Sorry page in maintenance' message. The icon next to this text box allows the message to be formatted in HTML with images etc. Unticking this check box means the campaign is now live once more.
9. This allows you to manage the seed addresses that will receive this campaign.
10. (optional) If you have de-dupe on send disabled this option will appear on your campaigns so that you have the option whether to de-dupe your audience on send or not
11. This allows you to enable the campaign to be a GatorExpress campaign.
12. The Landing Zone URL is where your account is hosted, any Landing Zones, Surveys, Webcaptures and anything else hosted on CommuniGator will have this URL.
13. The CC and BCC are not visible by default but can be switched on if necessary, please note that if you have an audience of 10k the CC or BCC address will receive 10k emails.

14. Sender Alias Dynamic can be used to select a Contact field to be displayed when the email is delivered. An example of use would be to populate the Account Managers name here.
15. Sender Alias Address can be used to select a Contact field to be displayed when the email is delivered. An example of use would be to populate the Account Managers Email Address here (however CommuniGator must be configured to send from the Domain used) There is a separate Article for more information on this.
16. Reply Email address Dynamic can be used to select a Contact field to be displayed when the the recipient clicks reply. An example of use would be to populate the Account Managers Email here.
17. The CC and BCC Dynamic is not visible by default but can be switched on if necessary, please note that if you have an audience of 10k the CC or BCC address will receive 10k emails.
18. (optional) If you have approval groups set up you can selet the approval group you would like to approve the campaign before sending. This will display as blank if you have not got approval set up.
19. This item is normally used by Integrated customers who's campaigns are created automatically thus removing the ability to copy the campaign on set up. Select the campaign you wish to copy from the drop down and tick whether to include the audience in the copy or not and then click copy.

Campaign - Audience

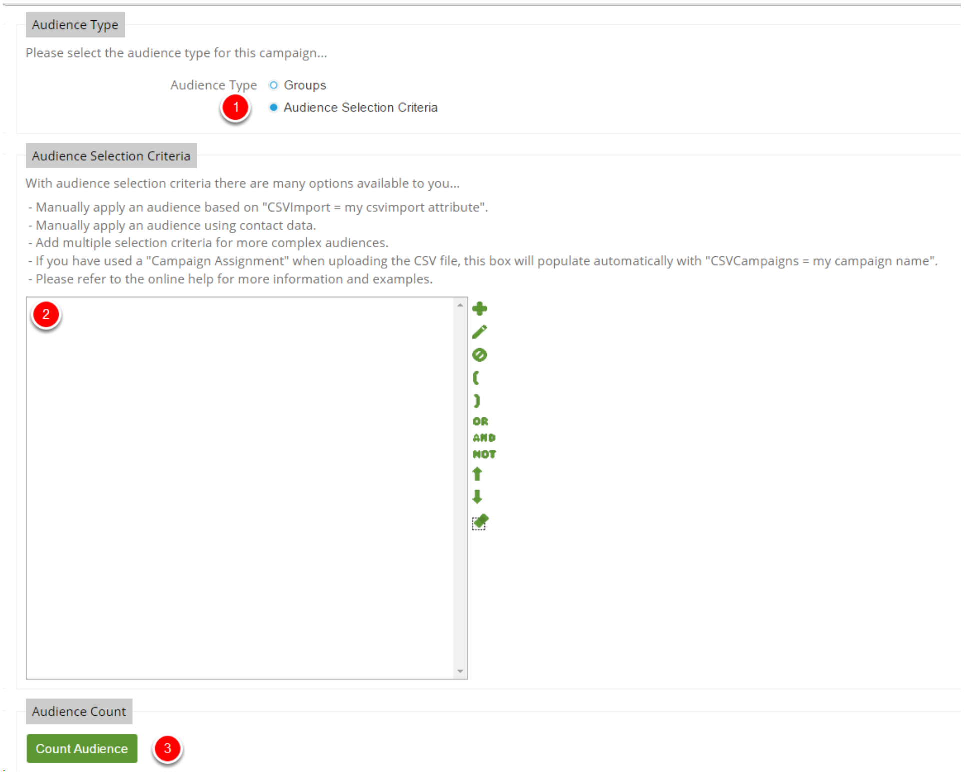
The audience tab within the campaign is where you attach the audience you wish to send to.

Campaign - Audience - Group



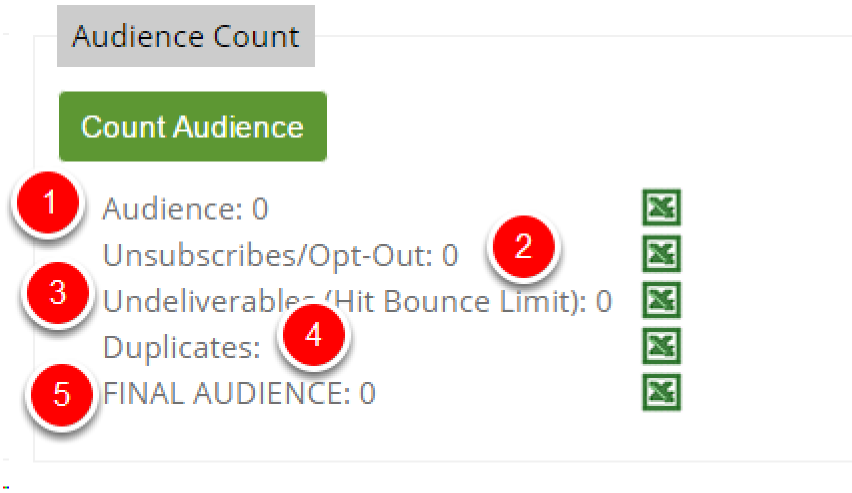
1. To attach a Group to the campaign select groups.
2. Select the group by either typing the name in the box or by clicking select.
3. Once the group is attached click count audience to ensure the count is correct.

Campaign - Audience - Audience Selection Criteria



1. Select Audience Selection Criteria.
2. Apply the required criteria.
3. Count the audience once you have applied the criteria to ensure that it is correct.

Campaign - Audience - Count Audience



1. This is the total count of the audience attached.
2. This is the number of contacts in the audience that will not be sent to as they have been suppressed due to having hit the bounce limit. (These contacts will have previously Hard Bounced or have Soft Bounced 5 times).

3. This is the number of contacts that will not be sent to as they have been suppressed due to being marked as opted out, according to the Unsubscribe attached to the Campaign.
4. This is the number of duplicate contacts in your audience.
5. This is the final number of contacts that will be sent the campaign.

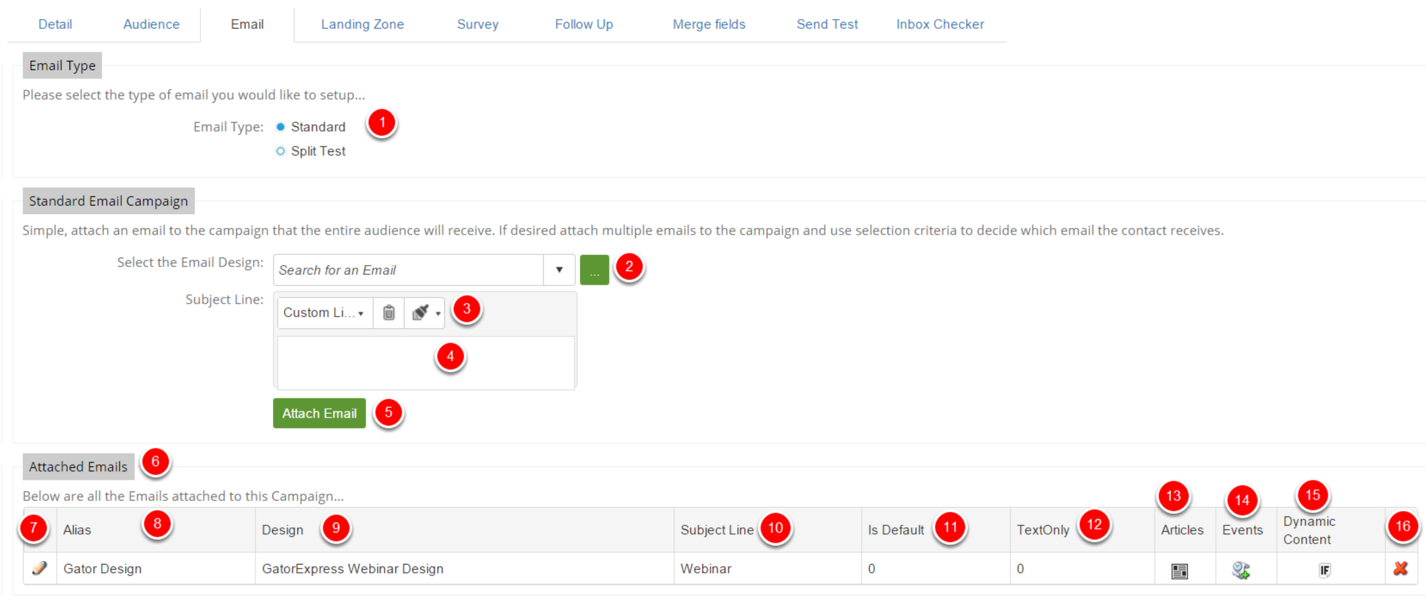
Please note the Final Audience count does not remove duplicates, these are done immediately before the send if the feature is enabled on your account. It also does not take into account any suppressions made under the Suppress Domain section, these are done immediately before the send.

Clicking on the green icon next to each count will export a list of contacts that are included in that count.

Campaign - Email Standard and Split Test

This step will be looking at how to attach a standard email to a campaign.

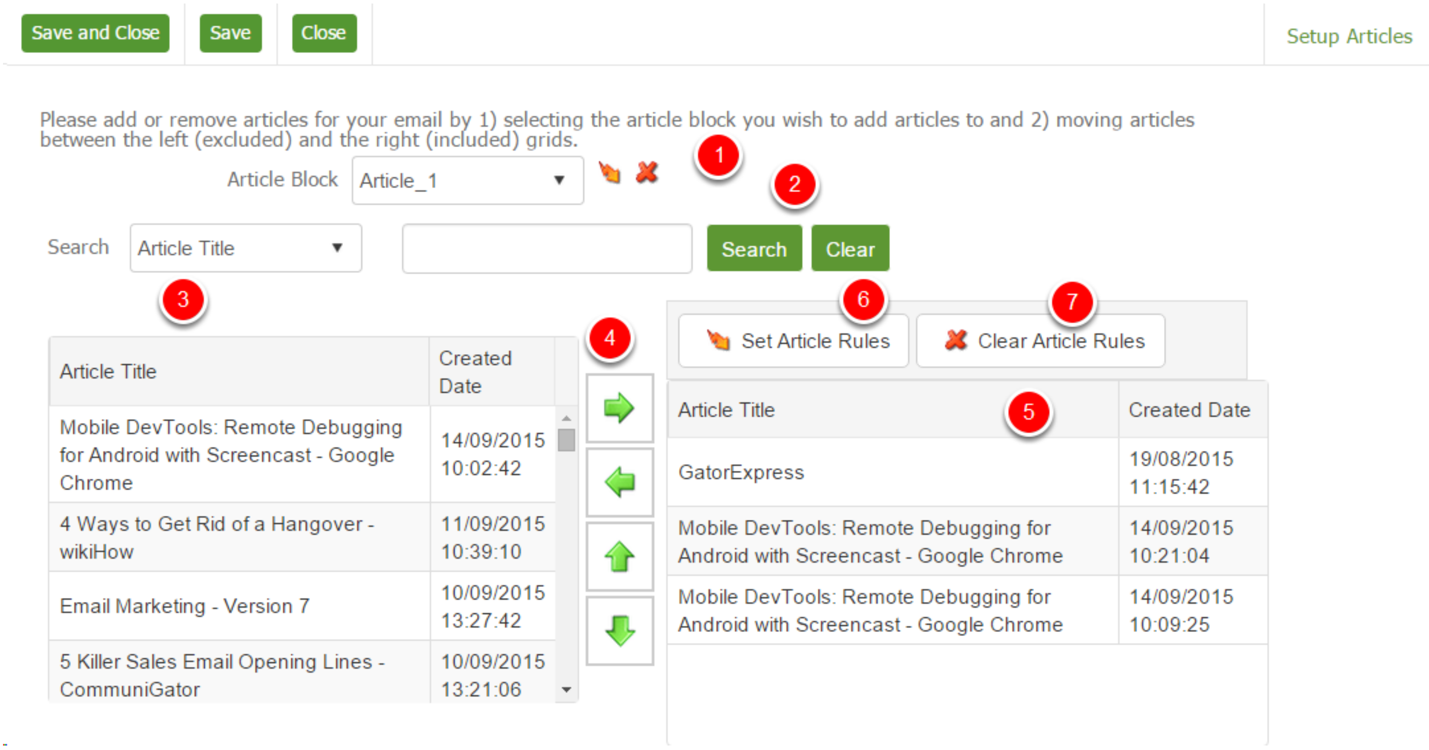
Email Type - Standard



1. Click on the standard email option.
2. Select the email design: if you click on the blue box with"..." This will bring you to the emails that you have created, from that list select the email that you are looking for.
3. You have the option of inserting custom links (creating personalisation). Next to the Custom Link drop down, you have the option to paste items in. The final icon is the formater which allows you to strip different formatting and elements.
4. Insert the subject line that you are looking to use. However if you copy over the subject line make sure you Paste it into a notepad first as this will strip the formatting of it.
5. Click the "Attach Email" blue button to attach the email.
6. The attached email will appear in the Attached Email section
7. The pencil allows you to edit the campaign display which includes: Alias, Design, subject line and adding attachments.
8. The Alias is what the email is known as.
9. Is the attached email.
10. Is the subject line for the email.
11. The default send version is a HTML.
12. If someone from the audience receives it a text version.
13. This button allows you to attach the articles that you have created for the campaign.
14. The event's button allows you to attach the events

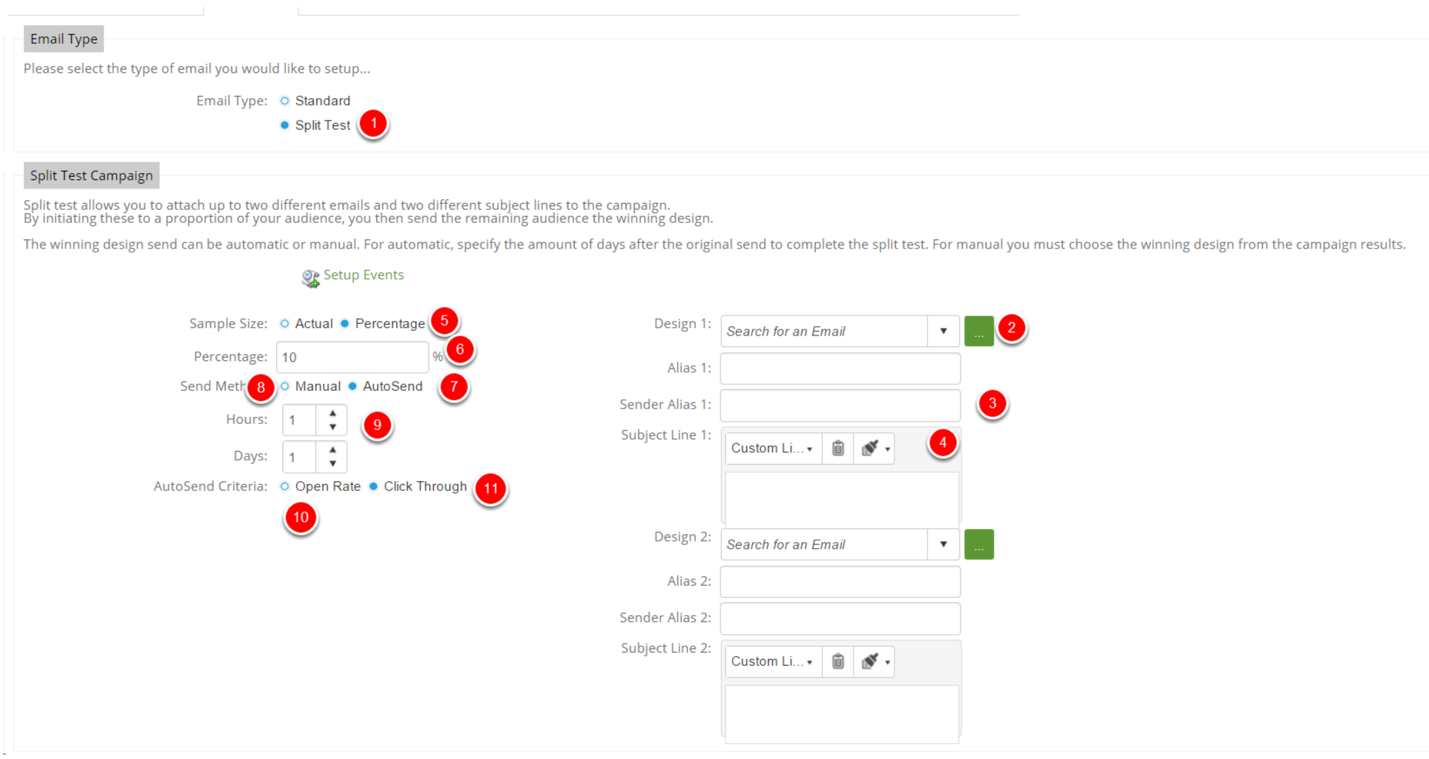
15. Is a block that changes depending on variables in the data. i.e. if the first name is unavailable then it will change to something Generic depending what the user has set up.
16. The big red "X" allows you to delete the campaign.

Attaching Articles



1. Allows you to pick the article block that you wish to use if you have multiple article blocks set up.
2. Allows you to search either by Article title of Created Date.
3. All the articles that you have created will appear here ordered by created date newest- oldest.
4. The arrows in the centre of the two boxes allows you to add and remove articles and the down up and arrows allow you to change the order that the articles appear in the email. However in order to move or make changes you need to click on the article that you want to move.
5. The articles that will appear in your email.
6. Allows you to create rules for each article.
7. Allows you to clear the rule if you no longer need it in place.

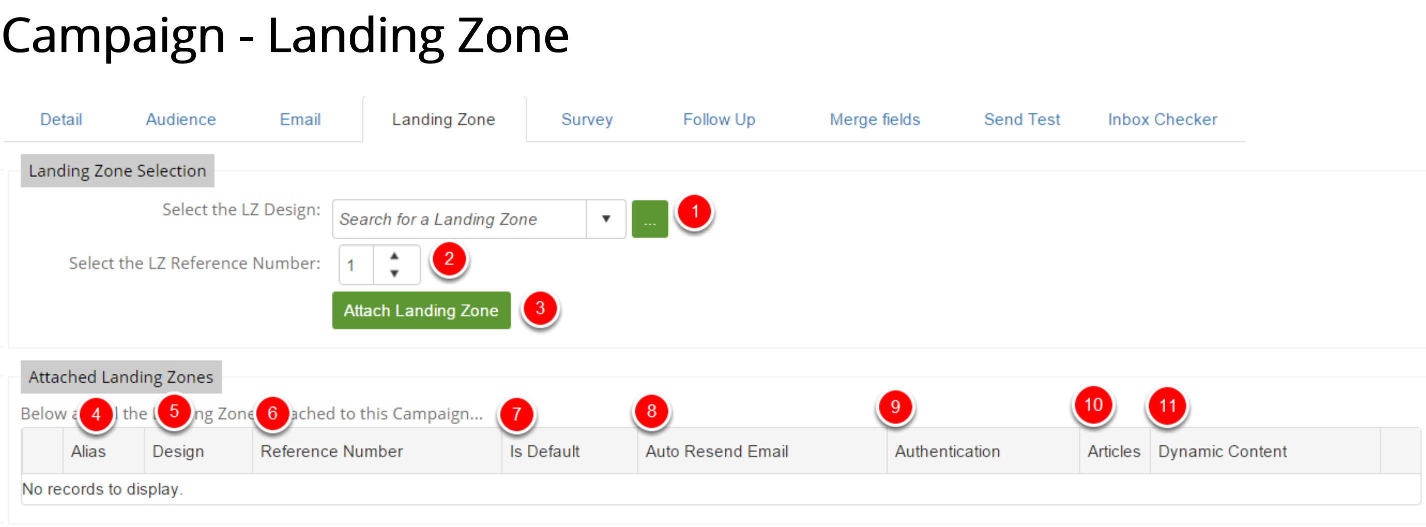
Email Type- Split Test



1. Split testing allows you to test two email campaigns.
2. Attach the email that you wish to send.
3. Sender Alias is what the email sender will appear as.
4. Is the subject line, thus if you wanted to you could have two different subject likes and compare the one that has the most clicks/open rates.
5. The sample size - Actual is entering a number of people you wish to send it to.
6. The percentage of the audience that you wish to send it to.
7. Auto send- Where the campaign will send automatically after the split test is completed.
8. Manual- After the split test is completed choose the campaign that you wish to send.
9. The length of time that you wish the split test to run for.
10. whether you would like the results to be on the highest open rate.
11. whether you would like to results to be on the highest click through.

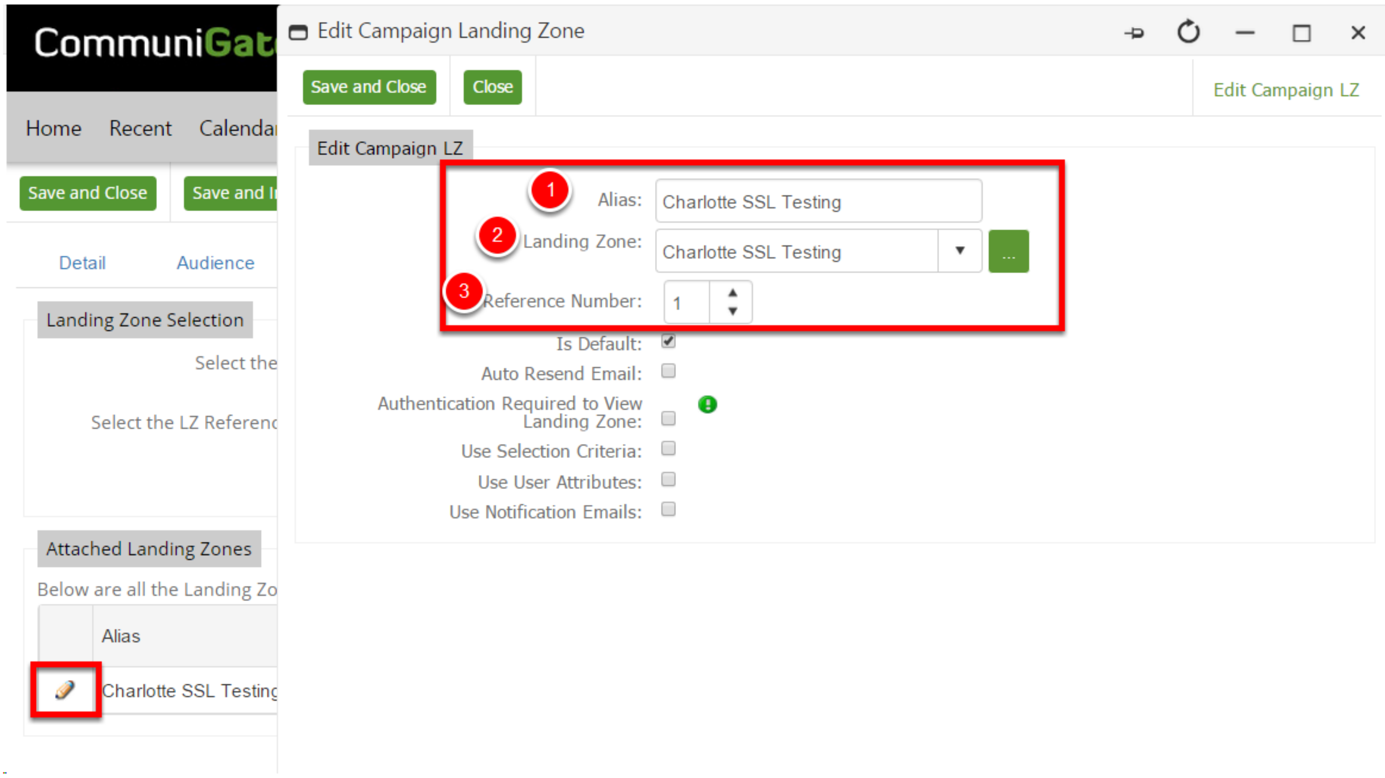
Campaign - Landing Zone

Under this tab of the campaign you can attach your Landing Zone(s) to the campaign.



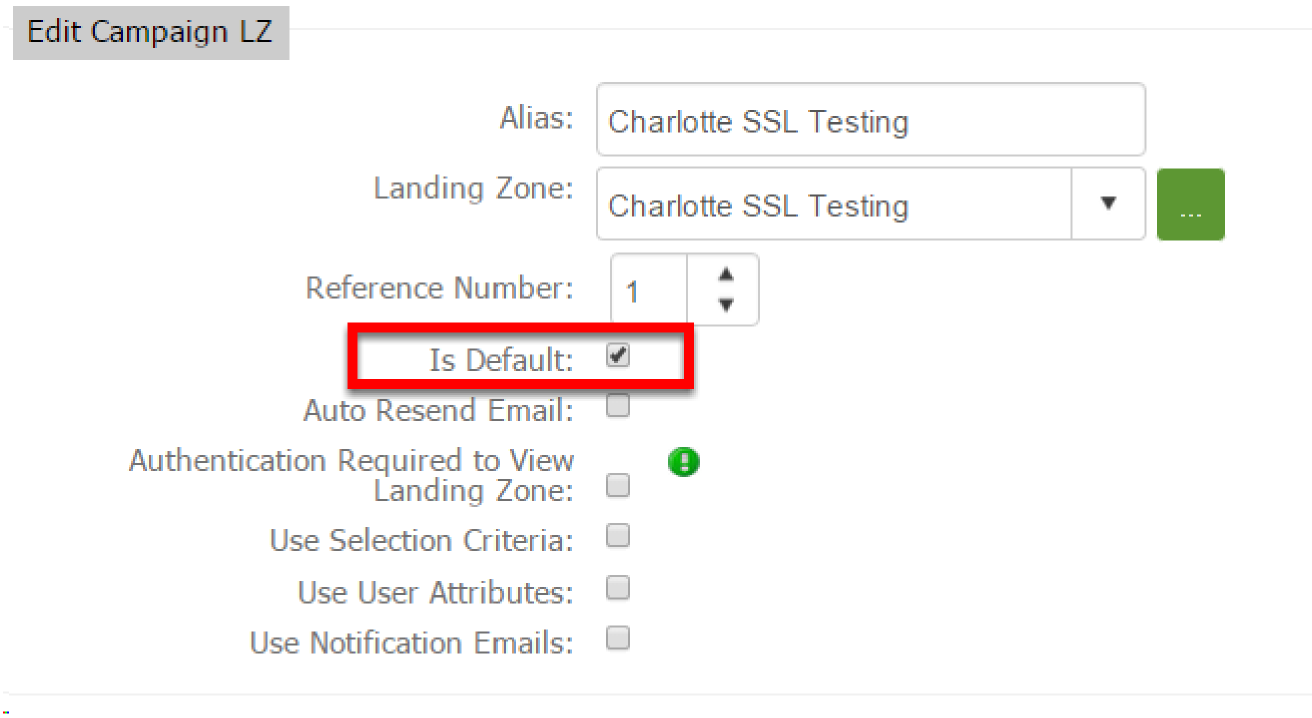
1. Select the Design that you would like to attach.
2. Select the reference number of the Landing Zone, (you would have chosen this when you inserted the Landing Zone Link within the Email)
3. Click Attach Survey to attach it to the campaign.
4. This displays the Alias of the Landing Zone.
5. This shows the name of the design that has been attached.
6. This shows the reference number of the Landing Zone.
7. The Is Default option is used when multiple Landing Zones are attached to the campaign with the same reference number and Selection Criteria is used. Selecting is default means if the contact doesn't meet the criteria of any of the options then they will be shown the default Landing Zone.
8. This option is useful if the contact has updated their preferences to say that they would like to receive either HTML or Text the resend will then be of their preference.
9. This indicates if Authentication is switched on for the Landing Zone.
10. This button brings up the pop up to assign Articles to the Landing Zone.
11. This button brings up the pop up to assign Dynamic Content to the Landing Zone.

Landing Zone - Advanced details



To Access the advanced details select the pencil icon.

1. The Alias is used to mask the name of the Landing Zone in the browser or better describe the Landing Zones on the campaign.
2. Editing the Landing Zone.
3. Editing the reference number for the Landing Zone.

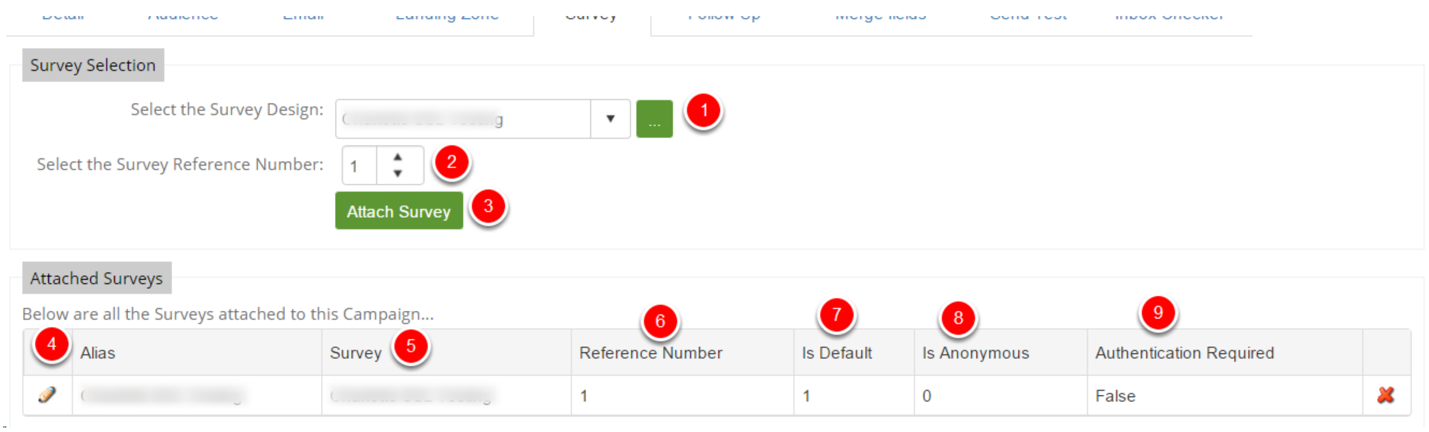


"Is Default" is used in conjunction with "Use Selection Criteria" so that if a contact does not meet the criteria of the condition set on the other Landing Zones this Landing Zone is used by default i.e as a backup.

Campaign - Survey

Under this tab you can attach Surveys to your Campaign.

Campaign - Survey

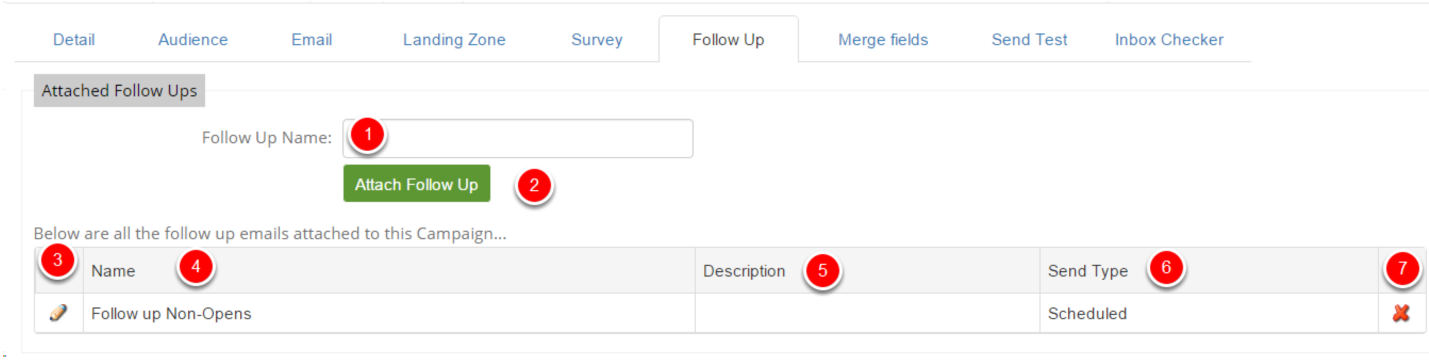


1. Select the Survey Design that you would like to attach.
2. Select the reference number of the Survey, (you would have chosen this when you inserted the Survey Link within the Email)
3. Click Attach Survey to attach it to the campaign.
4. This displays the Alias of the Survey.
5. This shows the name of the Survey that has been attached.
6. This shows the reference number of the Survey.
7. The Is Default option is used when multiple Surveys are attached to the campaign with the same reference number and Selection Criteria is used. Selecting is default means if the contact doesn't meet the criteria of any of the options then they will be shown the default Survey.
8. This indicates if the Survey is Anonymous..
9. This indicates if Authentication is switched on for the Survey.

Campaign - Follow Up

This tab allows you to attach Follow ups to the campaign.

Campaign - Follow Up

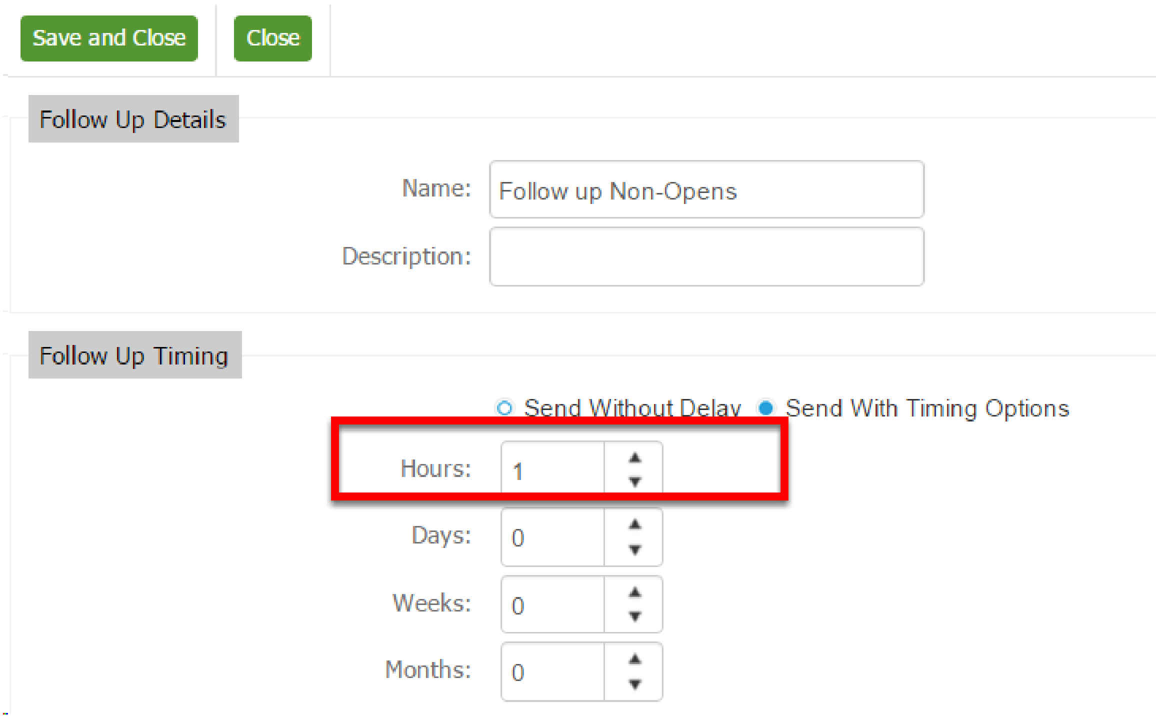


1. Enter the Name of your follow up.
2. Click to attach your follow up.
3. Click the pencil to set/edit the criteria of your follow up.
4. This shows the name of your follow up.
5. This shows the description of your follow up.
6. This shows the send type.
7. Click here to delete the follow up.

The follow up email function allows you to send an email to a pre-existing campaign audience. For example, you may have set up a campaign with a survey field that allows visitors to opt in to certain content (such as a weekly newsletter).

You could then create the newsletter and attach this as a follow up email. This newsletter could then be sent to the entire audience that opted in to that newsletter within the original campaigns survey. Within the follow up details you are able to set a number of timing options to customize the send itself, as seen below

Follow Up Details

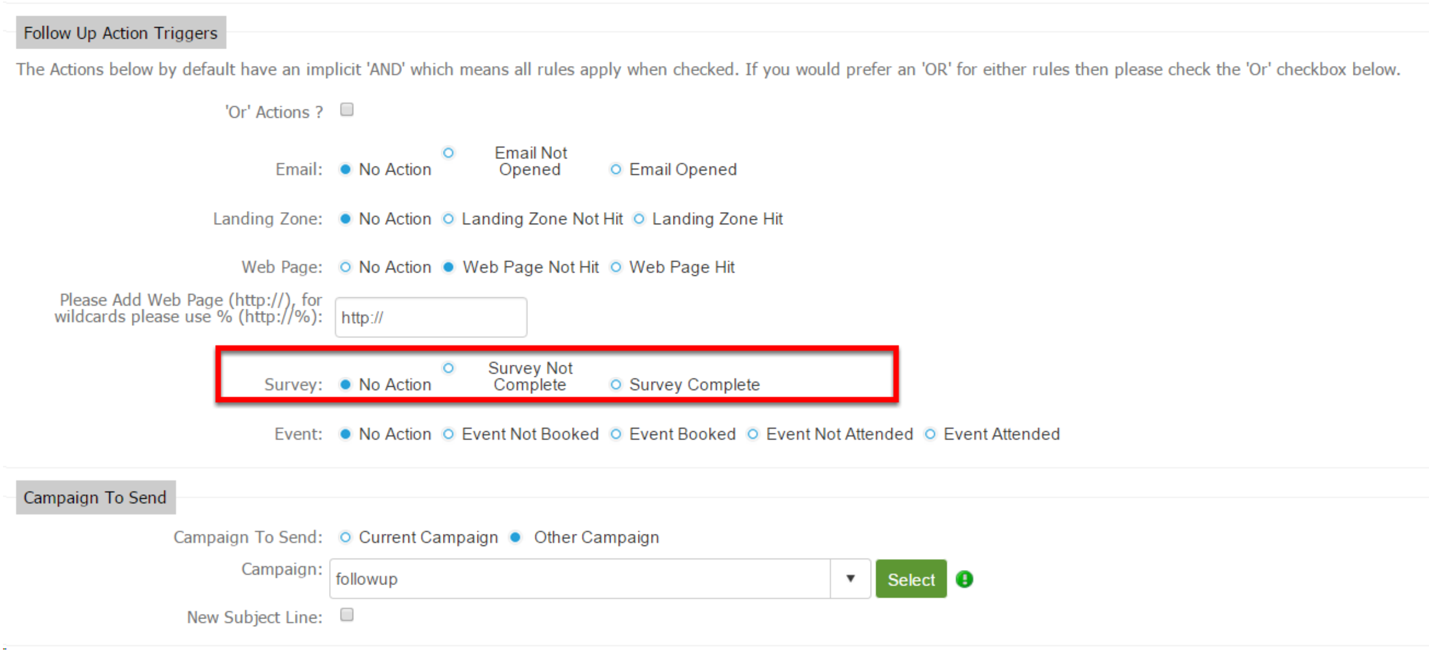


The timing options allow you to specify exactly when you want the follow up to send. Any timing option you select will be relative to the time the original email campaign sent / sending criteria were met. (this is on a contact by contact basis)

In regards to our example above, the follow up would be sent 1 hour after the opt in to newsletter field had been selected.

You are also able to set a "send without delay" option.

Follow Up Details continued



Within the follow up details tab you are able to set an action trigger. A trigger is simply a specified action that cause the follow up to be sent. As seen in the screen shot above, a trigger could be anything from opening the original email, to the completion of a survey.

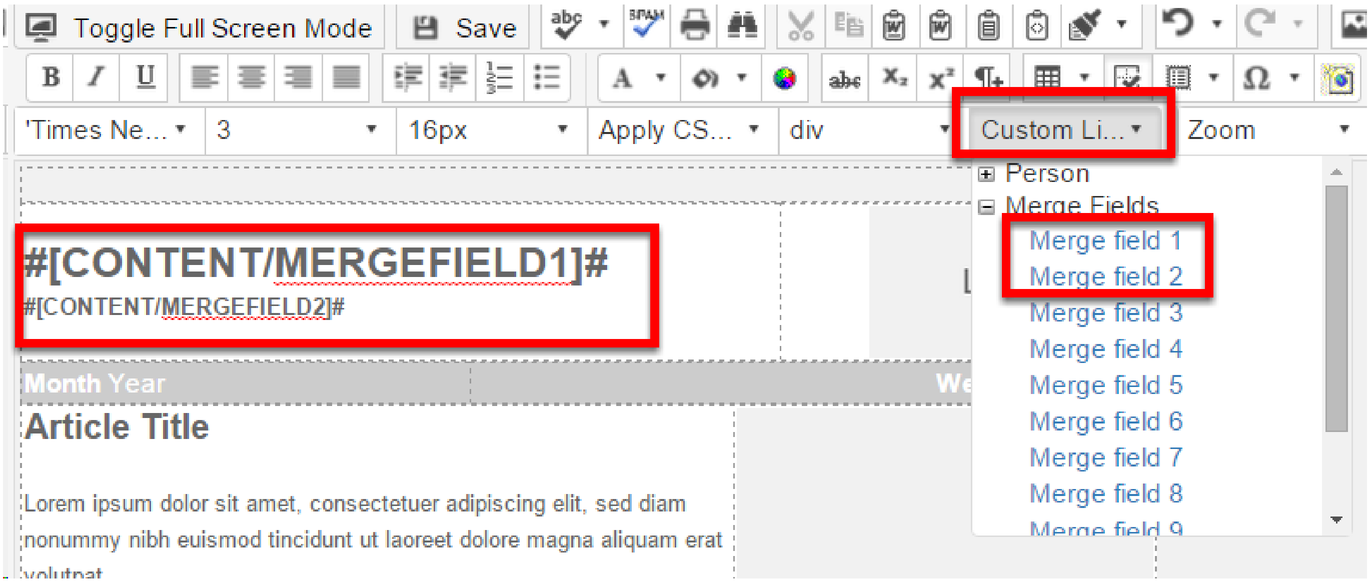
At the bottom of the follow up details page we can select the campaign we would like to attach the follow up too. We can select the "Current Campaign" (the one we are setting the follow up inside) or an "Other Campaign".

If setting up a follow up for another campaign you must check:

1. That the other campaign has its campaign type set to "follow up"
2. That the campaign has been initiated

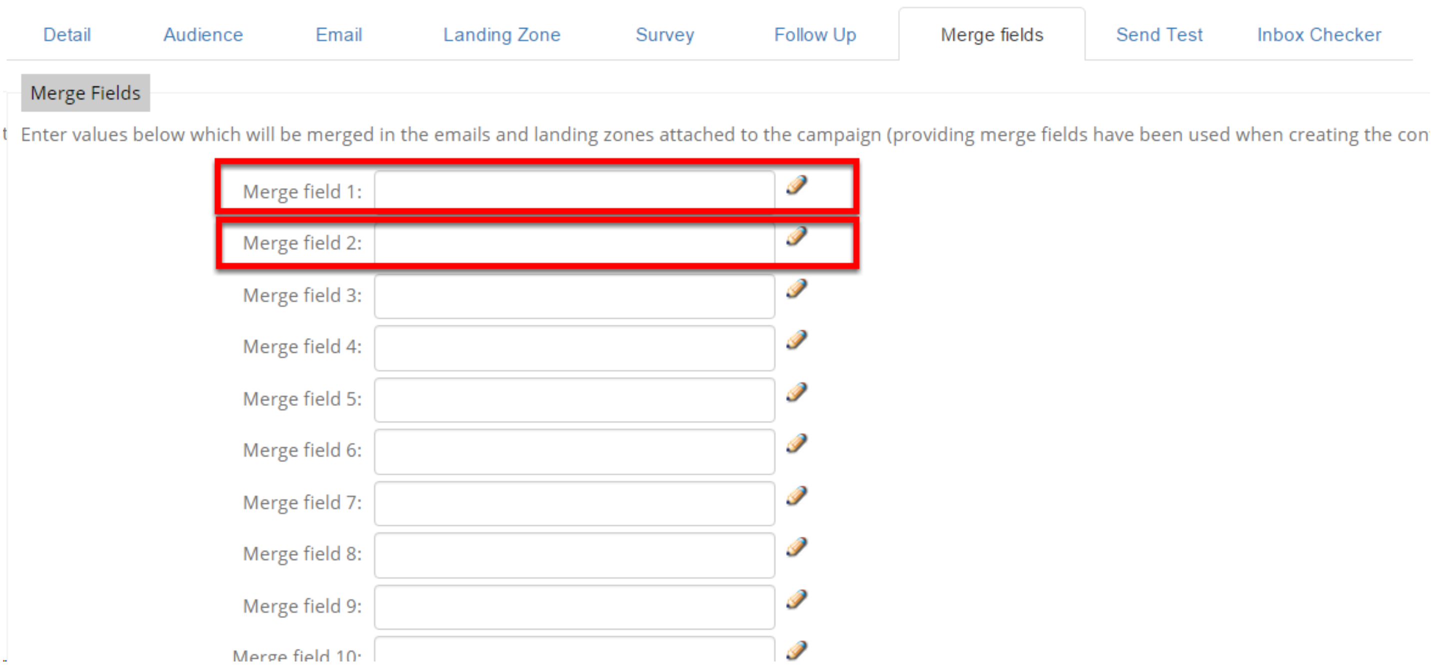
Campaign - Merge Fields

Campaign Merge fields in emails or Landing Zones



If you have used Merge Fields within your Email or Landing Zones then here is where you specify the contents of the Merge Fields that will be displayed.

Campaign - Merge Fields



You can type the Merge field data directly into the field or click on the pencil icon to open up the HTML editor to use links or personalisation for example.

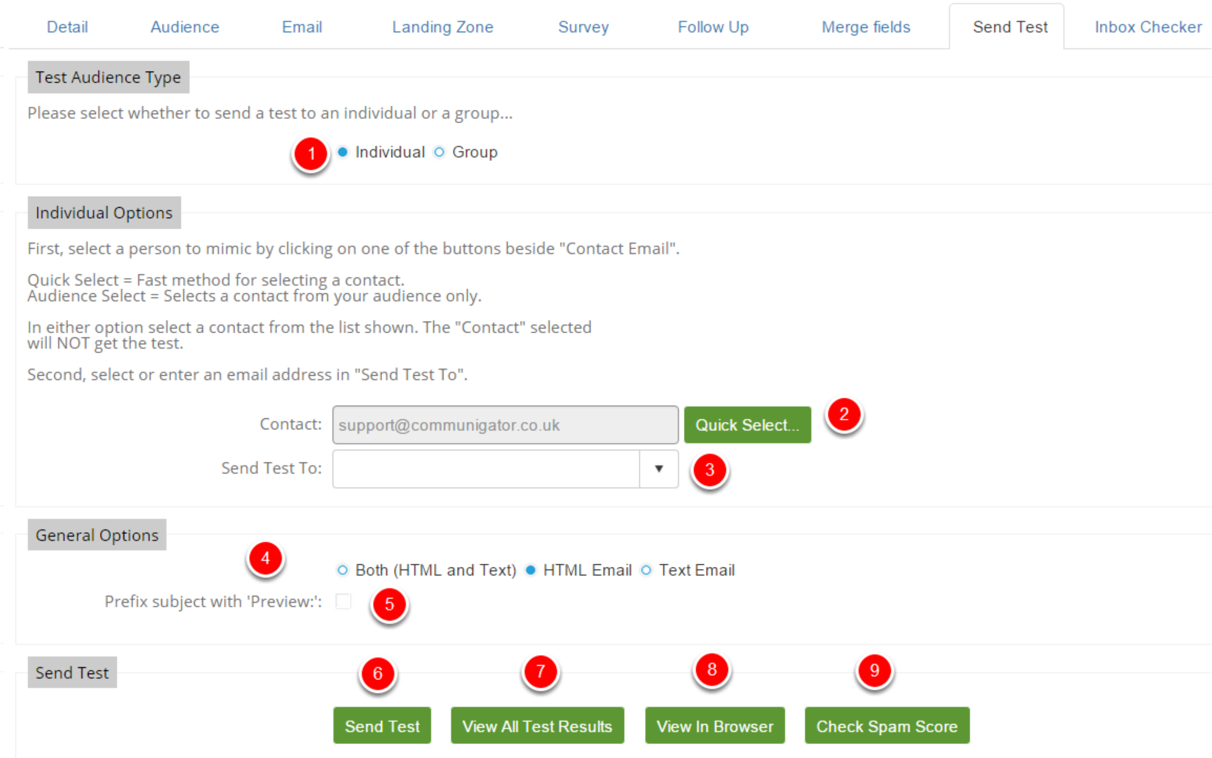
Note:

This is limited to ten merge fields per campaign.

Campaign - Send Test

You can use this tab to send est emails of your campaign.

Sending a campaign test



1. Select the option to send an individual Test or to send to a Group of contacts.
2. This is the contact that is being mimicked within the test Email, so any personalisation within the Email will be as if this contact had received the Email.
3. This is the Email address that test will be sent to.
4. Select whether to send both the HTML & Text version or just HTML or Text.
5. Tick this is you wish to prefix the subject line with Preview, this is handy so you can identify that it is a test Email.
6. Click to send the Test.
7. Click here to view all test results for the campaign.
8. Click here to view the Email in your browser.
9. Click here to check the Spam score of the Email.

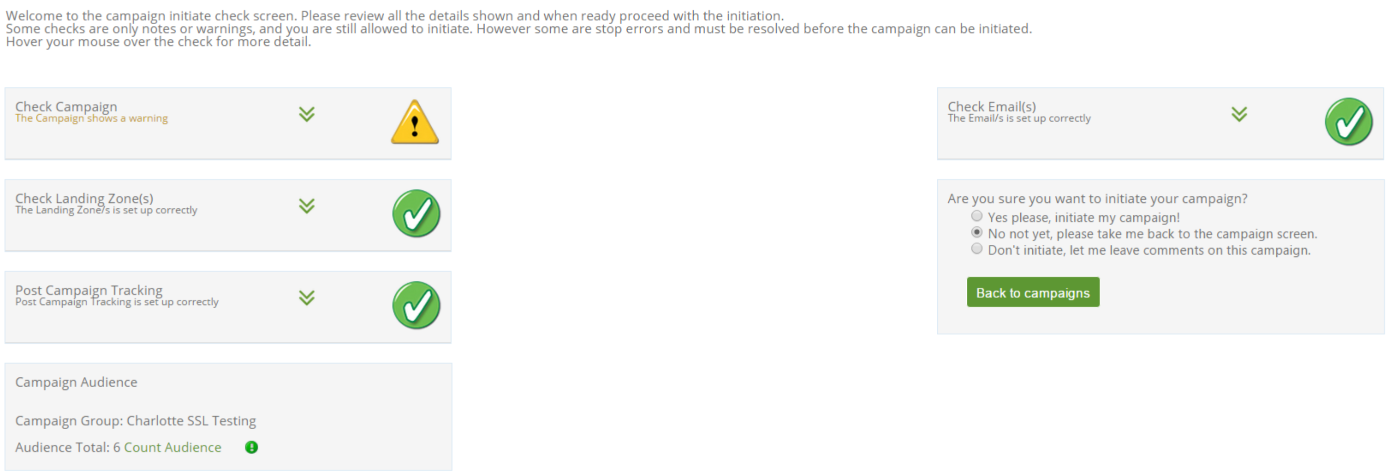
Initiate Check Screen

The Initiate Check Screen is designed to help you get the best from your campaigns, helping to spot any common mistakes that may affect the success of your email. This check screen is broken down into 5 sections:

- Check Campaign
- Post Campaign Tracking
- Campaign Audience
- Check Email(s)
- Initiate Campaign

Note: Some checks that are shown are notes or warnings. You will still be able to send your campaign even if these warnings appear. However, some are 'stop' errors, and must be resolved before the campaign can be initiated.

Overview

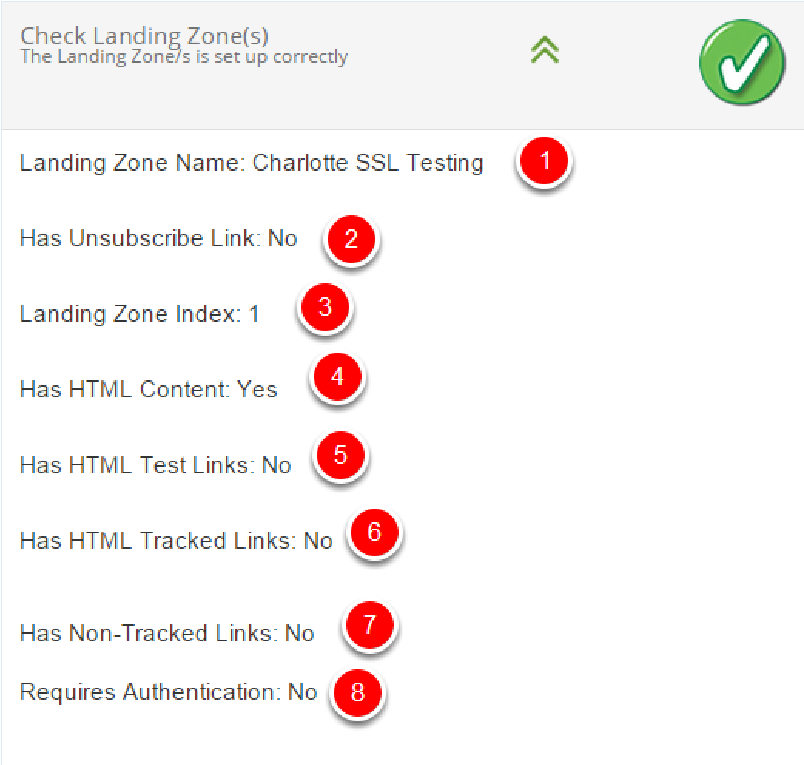


1. Check Campaign

This is the first set of checks that you will need to review. These warnings/notes are purely about the campaign setup itself:

1. This indicates the campaign name.
2. This is the campaign type.
3. This indicates how long the campaign is live for.
4. This states the initial start and end date of the campaign.
5. The sender email address.
6. The reply address.
7. The unsubscribe that is attached to the campaign.
8. This indicates whether a send to a friend is attached to the campaign.
9. This states whether a HTML test email has been sent.
10. This states whether a TEXT test email has been sent.
11. This shows whether an Inbox Checker has been run.
12. This shows whether any follow-ups are attached to the campaign.

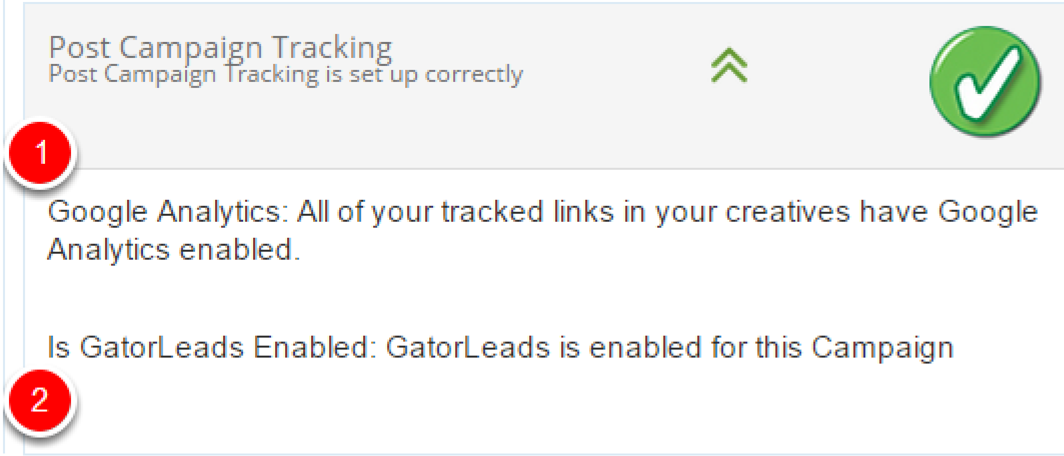
2. Check Landing Zone



This is the second set of checks that you will need to review checking your landing zones.

1. Identifies the Name of landing zone
2. Does the landing zone have an unsubscribe link
3. Identifies the reference number of landing zone
4. Identifies if the landing zone has content
5. Identifies if there are test links in the landing zone
6. Identifies if there are tracked links in your landing zone
7. Identifies if the landing zone requires authentication

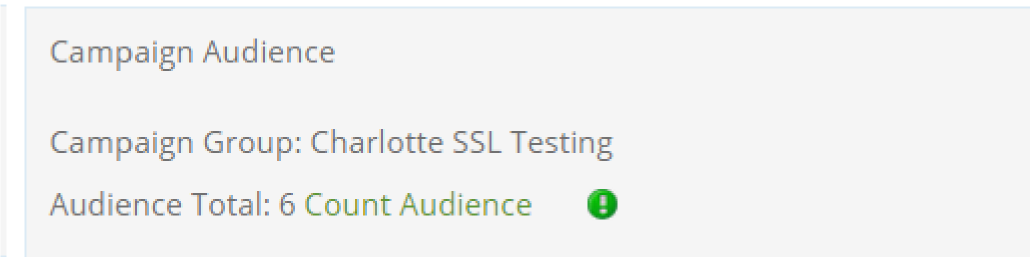
3. Post Campaign Tracking



This is the third set of checks that you will need to review.

1. When creating tracked links within your creative email design, you have the ability to track these links within Google Analytics using UTM values. This section indicates whether your links are Google Analytics enabled.
2. GatorLeads is CommuniGator's website tracking software which allows you to track who is on your website and what content they are looking at in real time.This section shows whether GatorLeads is enabled for your campaign.

4. Campaign Audience



This is the fourth set of checks that you will need to review.

The audience in a campaign determines who will receive the email. This check screen will identify which gator group you have attached to the campaign and how many contacts are included in the group.

Note: You also have the ability to recount the audience to make sure that the contact count is correct. We would recommend this as a quick check to make sure the right group is attached.

5. Check Email(s)

This is the fifth set of checks that you will need to review. These warnings/notes are purely about the creative email itself:

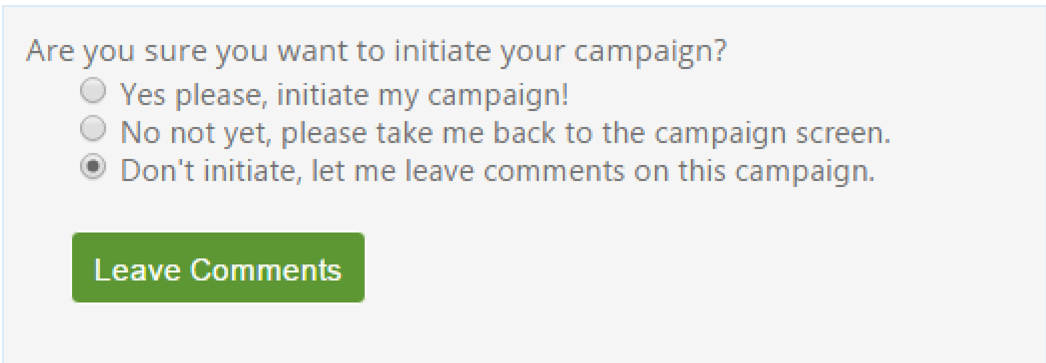
1. This indicates the creative email name.
2. This shows the subject line attached to the campaign.
3. This indicates whether a HTML email has been created.
4. This indicates whether a TEXT email has been created.
5. This shows whether an unsubscribe link has been included in the HTML version of the email.
6. This shows whether a survey link has been included in the HTML version of the email.
7. This indicates whether a send to a friend link is included in the HTML version of the email.
8. This indicates whether you have HTML test links included in your email. (This can occur when a user copies the email/link from a test email back into the creative email design. The only way to remove these are by locating the creative email, removing the links, and re-inserting them using the Insert Web Link Icon).
9. This identifies whether you have included Tracked links within your creative email design.
10. This shows whether you have Non-Tracked links included in your HTML creative email design. (Non-Tracked links will not appear in the campaign results).
11. This identifies whether your HTML email contains articles.

12. This identifies if your text email has an unsubscribe link.
13. This identifies if your text email has a survey link.
14. This identifies if your text email has a send to a friend link.
15. This identifies if your text email has test links.
16. This identifies if your text email has non-tracked links.

6. Initiate Campaign

If you are happy with the results of the previous checks, then you are ready to initiate the campaign. This gives you the option to go ahead and initiate the campaign, or to revert back to the campaign details.

7. Comments



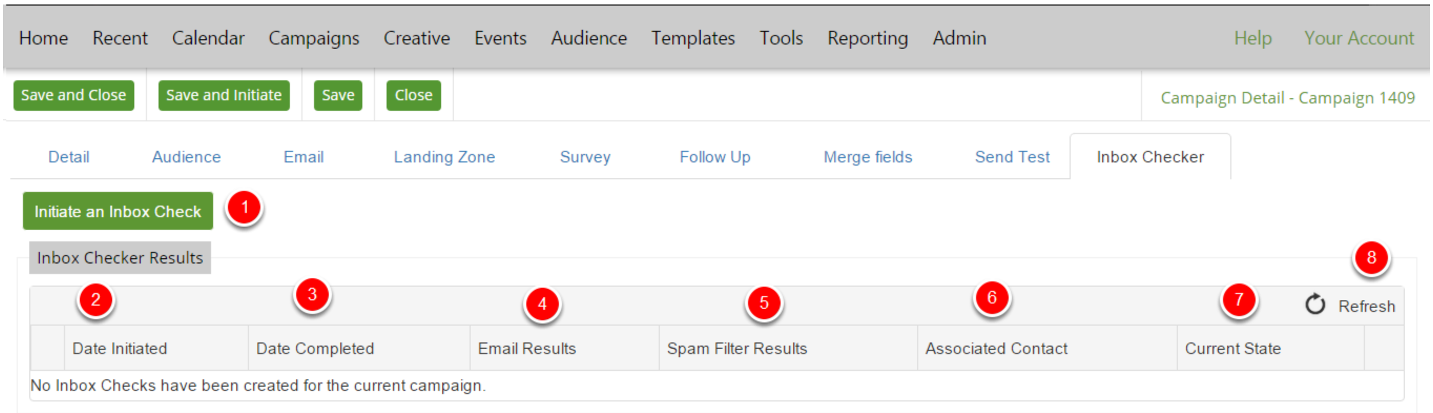
If you don't want to initiate your campaign but wish to leave comments, select the third radio button and click on 'leave comments'

Campaign - Inbox Checker

The inbox checker is a very useful tool to have as it shows you what the email will look like in different email clients, as well as providing you with a spam analysis and preview of the subject line.

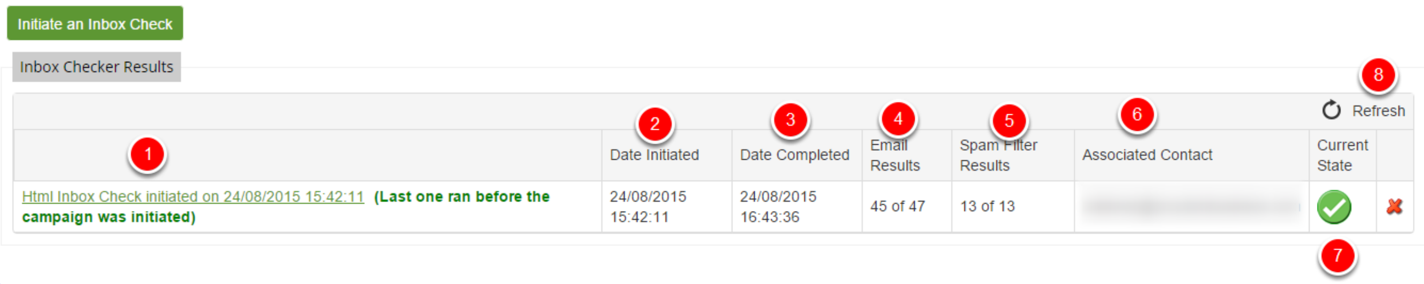
Every client will have the inbox checker tab. However, some clients may only have the basic inbox checker, which will display 2 results, others will have the advanced inbox which will display a lot more results. If you have the basic inbox checker, and would like to try the advanced version, please contact your account manager who can discuss getting this functionality added for you.

Inbox Checker



1. Click here to initiate a new inbox check.
2. This displays the date & time the inbox check was initiated.
3. This displays the date & time the inbox check was completed.
4. This displays the number of Email checks that have been returned.
5. This displays the number of Spam checks that have been returned (Advanced Inbox Checker ONLY)
6. The contact that was used to generated the email. This is used to populate sections of the email such as custom links or dynamic content which are generated for each user.
7. Current state shows if the check has finished or still running.
8. Clicking refresh updates the page.

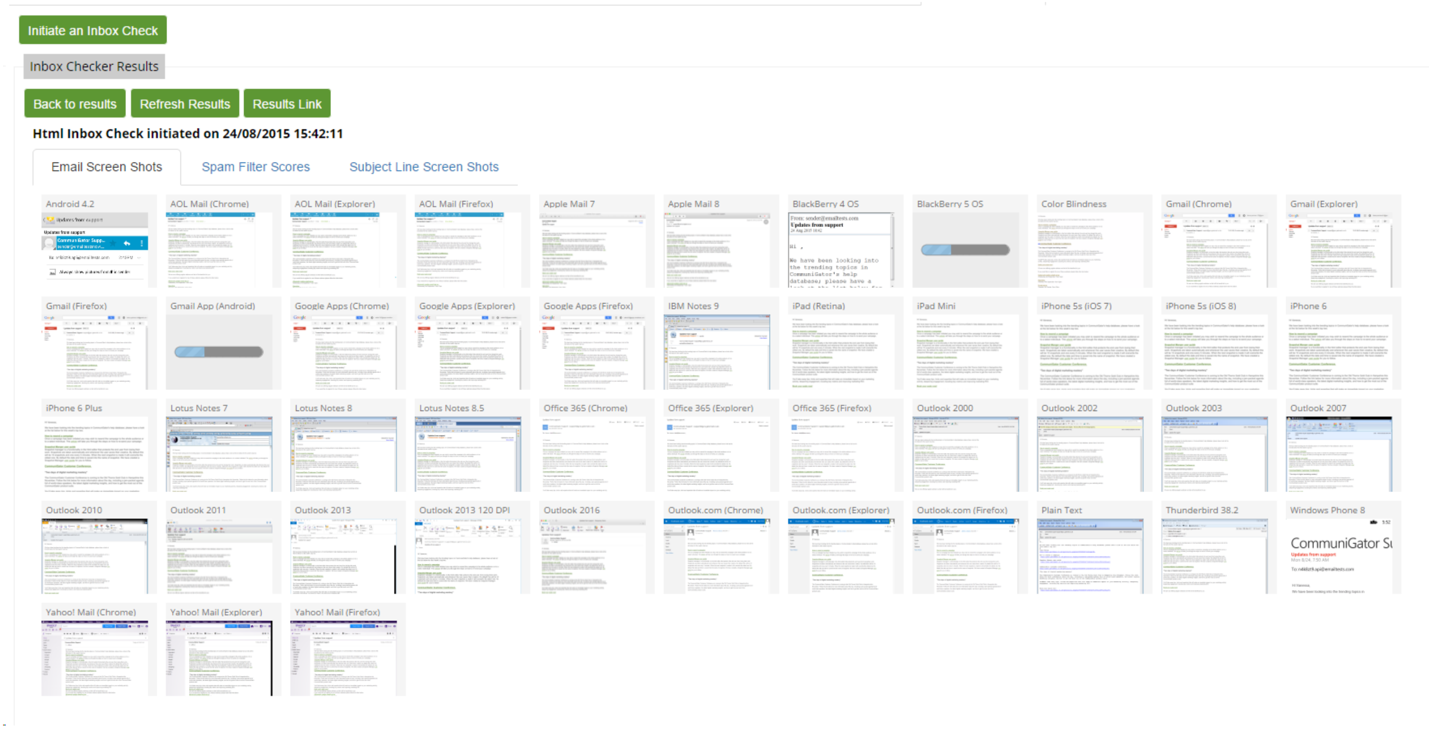
Inbox Checker Results



Once the inbox checker has has finished, you can view the results by clicking on the name of the inbox check.

1. This is the name of the inbox check- Click here to see the results of the check. (if campaign initiated, states when last inbox checker was run)
2. Date initiated- This is the time that the inbox checker started.
3. Date Completed- This provides you with the time the inbox checker finished.
4. Email Results- This is how many different email clients you are able to view results for
5. Spam Filter Results- How many spam filters it has checked.
6. Associated contact- If you are using dynamic content it will pull through the fields that the associated contact meets.
7. Current state- When this has a green tick the inbox checker has finished. If the inbox checker has a green tick, but the email results are 39 of 41 for example, this means the inbox checker was not able to retrieve the results for those inbox checks.
8. Refresh- if the inbox checker is not displaying any results, ensure you click the refresh results button. After starting the check, you will not see any results until you refresh the page.

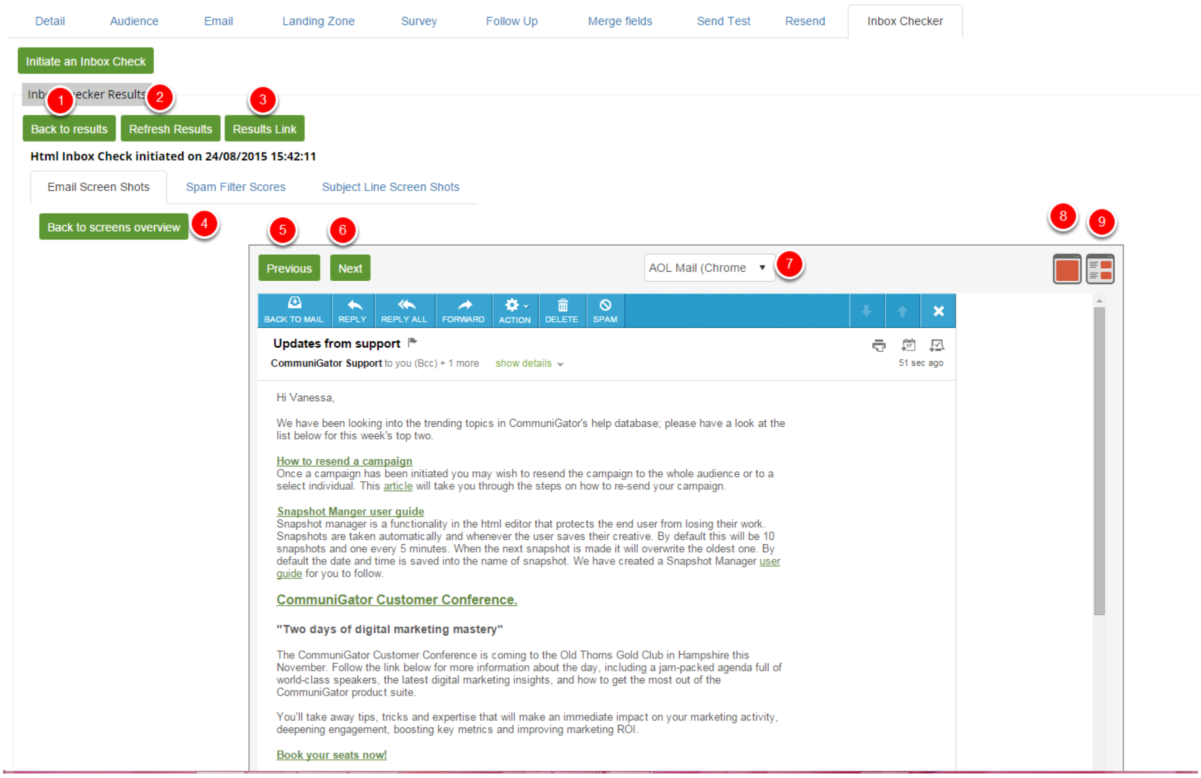
Email Screen Shots



When clicking on the name of the inbox checker it will take you through to the Email Screen shots which allows you to view what your email looks like in 41 different email clients.

You have the option to click on the inbox check that you are interested in, which will take you to a preview of the whole email instead of the preview at top of the email (see step below)

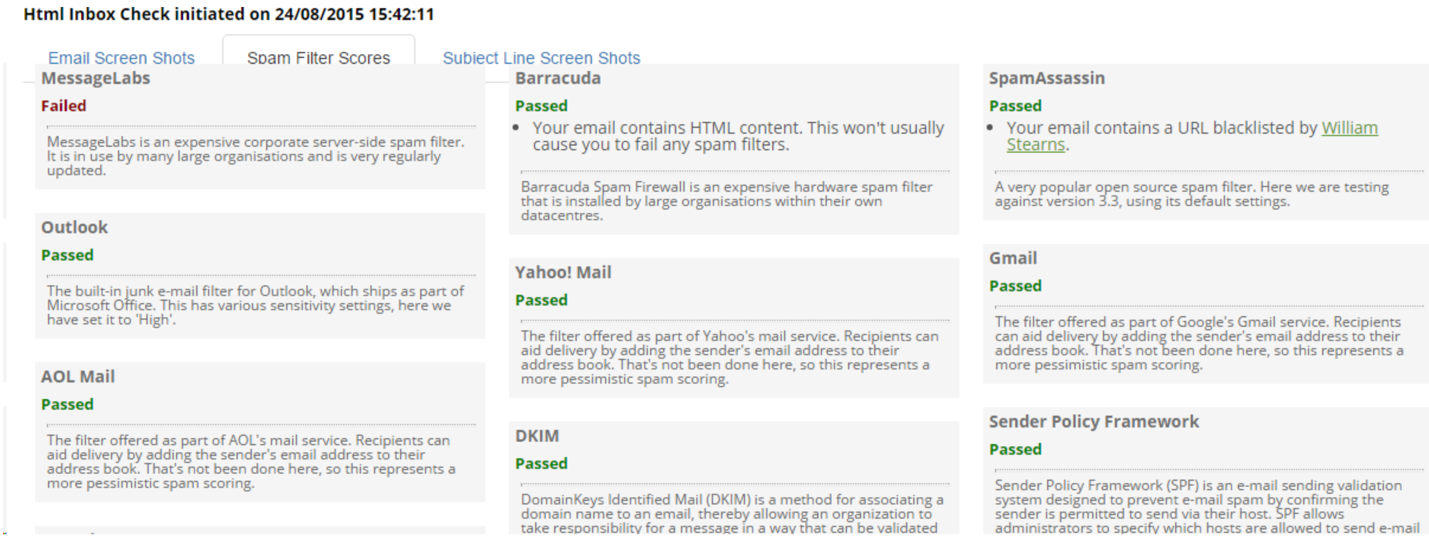
Email Screen Shots part 2



By clicking on the thumbnail images in the screens overview, you can generate a preview of the entire email. The screenshot above is what you will see.

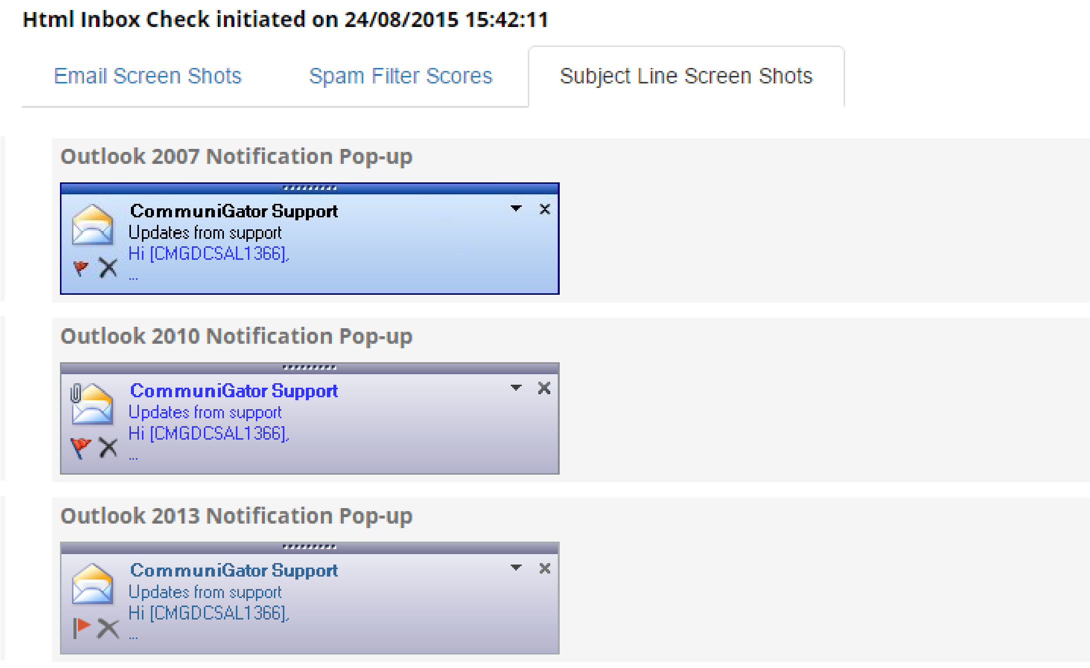
1. This takes you to the inbox checker tab within the campaign to view the results.
2. This refreshes the results
3. This will provide you with a results URL to send others.
4. Back to screens overview- This will take you back to the overview which is the screen that displays what the email looks like in different email clients.
5. Previous- this will take you back to the previous email client to preview your email
6. Next- This will take you to the next email client to preview what your email looks like.
7. By click on the drop downbox you can select the email client that you would like to see how your email displays
8. Show Preview pane- You can select whether you would like to see the preview pain or not
9. Display images- If you select this button the images will disappear from the email, this is useful as some email clients will not download the images automatically, particularly Microsoft Outlook.

Spam Filter Scores



By clicking on the Spam Filter Scores option you will be able to see if the email email has passed the spam filter test- this does not guarentee that it will pass through the spam filter, but it provides you with excellent guidelines. If it fails on a particular spam filter it will provide you with a reason why it has failed.

Subject Line Screen Shots



By clicking on the Subject line screen shots tab, you can access a list of what the notification pop-up looks like when the recipient receives an email. This is very useful as it is key to making your email as engaging as possible, and can influence whether the contact opens the email or not. Please note in the screen shot below where it says "Article" this is taken from the first line of your email. It is best practice to make this engaging; a lot of email marketeers forget about this and send out emails with a preview that displays HTML code and does not in fact display a catchy line to hook the contact on reading the email.

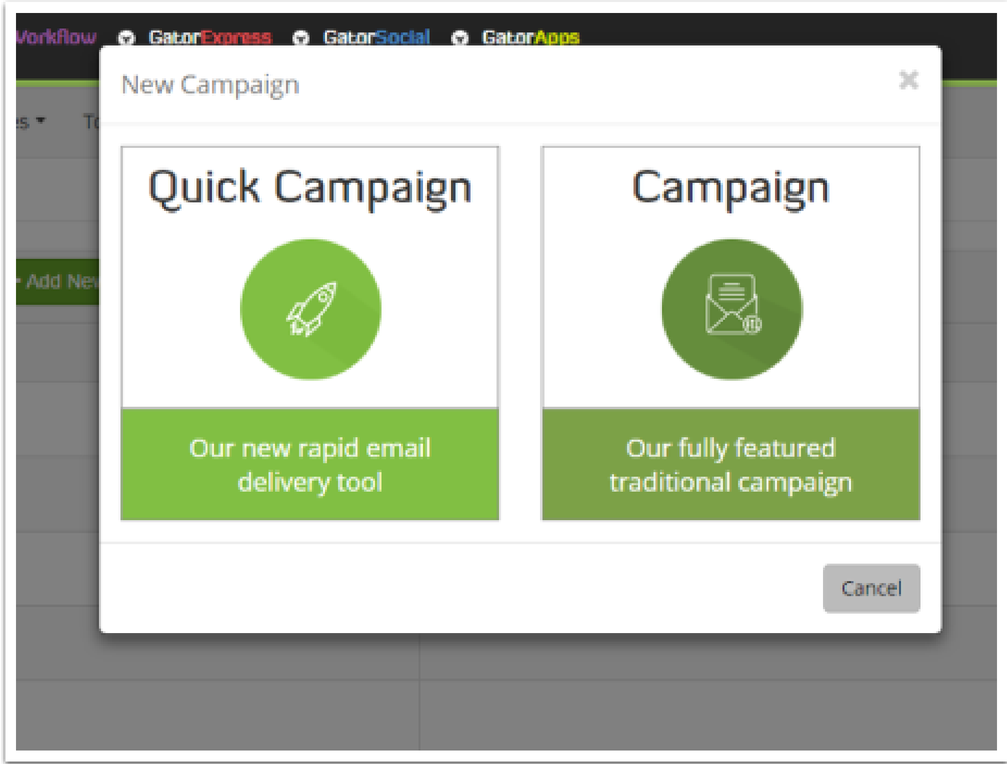
Quick Campaign: user guide

Campaign Select

New Campaign

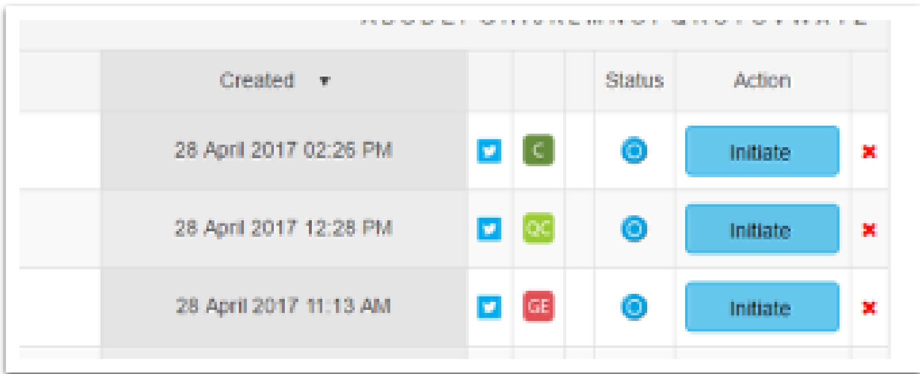
When you create a new campaign, you have two options.

1. Quick Campaign you can only copy a quick campaign. You cannot copy normal campaigns to new quick campaigns.
2. Normal Campaign



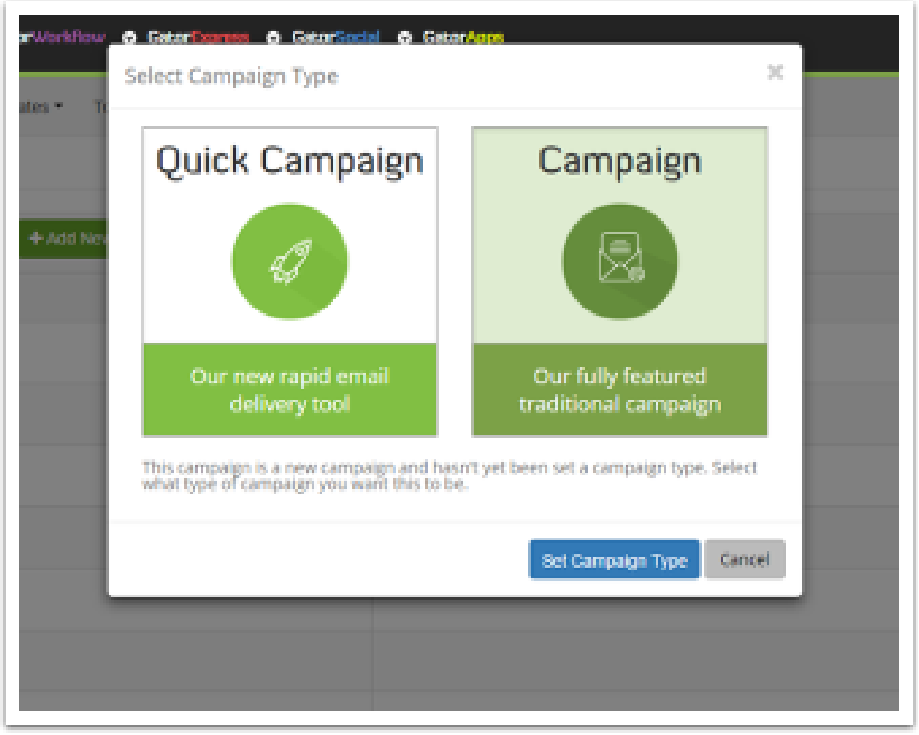
Campaign select grid

The grid has new icons which show the campaign type. Will either be quick campaign, normal campaign or gator express.



If a campaign has been created in CRM or externally to GatorMail. When the user clicks on the campaign, a popup will appear and ask the user to select which type of campaign they want the campaign to be.

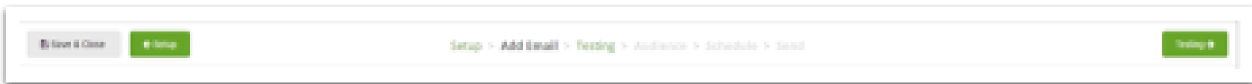
Quick Campaign



The quick campaign is a campaign wizard. You can only go to each page if you have complete page validation. You can go back on any page but only forward if you have completed the requirements of the page.

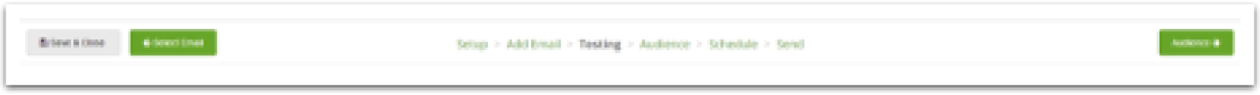
Navigation

The top bar acts a navigation to the user. They can either click the next or previous buttons to go back or forward or use the breadcrumb bar at the top in the middle of the page.



In the breadcrumb bar the current page is highlighted in bold and greyed out. The next or previous page pages are hightlighted in Green and are clickable. Any other page if greyed out and is not clickable.

If you have visited and completed every page you can navigate to any page as long as you don't invalidate the page.



Set Up

This is the first page of the wizard.

Campaign Details

- Campaign Name Setup the campaign
- Subject Line Setup the subject line for the campaign. This is done before you attach the email. This is a required field and requires an input from the user before they can continue with the wizard.
- Unsubscribe Set the unsubscribe for the campaign. If there is only one item, we disable the drop down.
- Send to a friend Set the send to a friend. If there is only one item, we disable the drop down. If there is no send to a friend's setup we do not display this
- Select Approval Group The user can select the approval group used for this campaign. Only shown if approval group are setup in the instance.

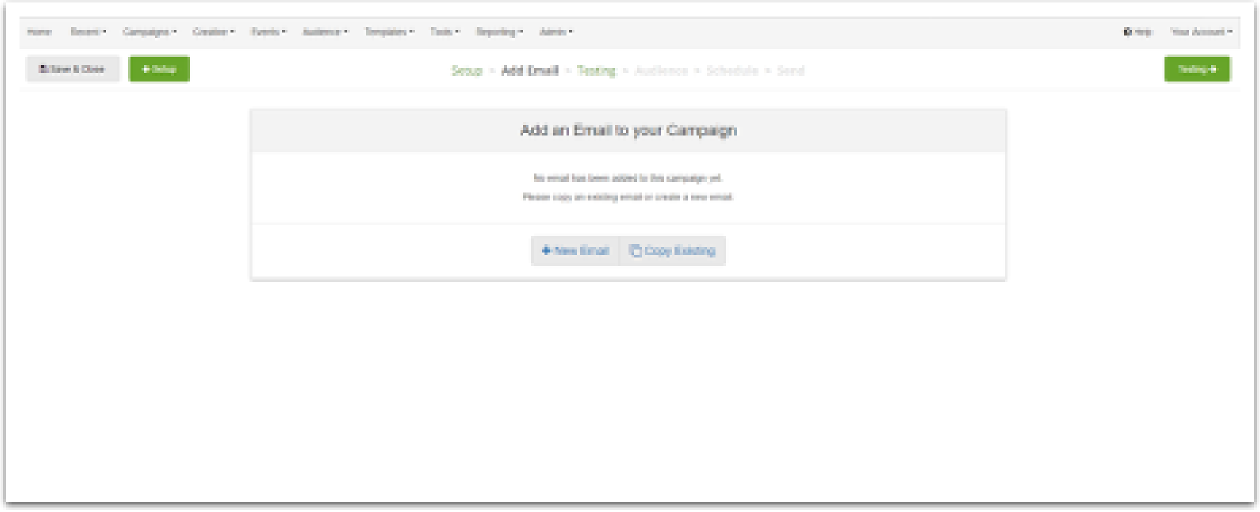
Sender Details

- Action Type Set the action type of the campaign. Can only be static or refresh.
- Sender Alias Set the Sender Alias for the campaign.
- Sender Email Address From Set the sender email address for the campaign. This is required and the user must enter a sender email address before continuing.
- Reply Email Address Set the reply to Email Address. If the user enters an email address, we validate the email address to make sure it's in the correct format.

Add Email

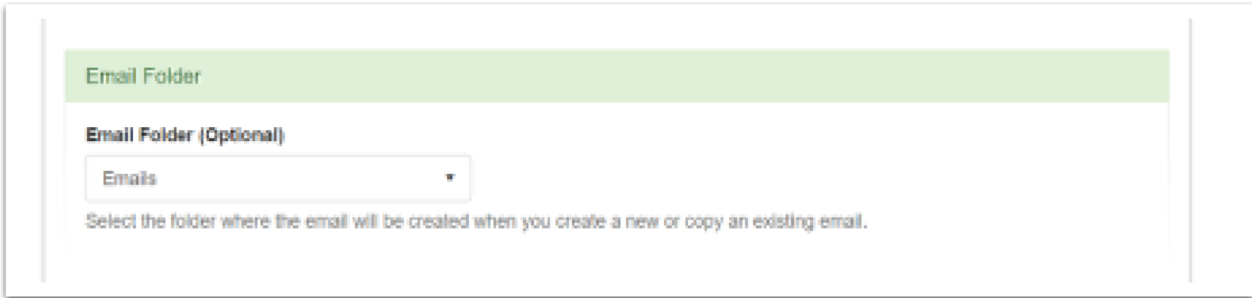
When the user navigates to this page for the first time they have the following options.

1. New Email Create a new email. The user cannot enter a name or any option, they will be taken to GatorCreator to choose an email and design their email. The name of the email is auto generated. "Campaign Name Time and Date". You can only create a new GatorCreator email.
2. Copy Existing Copy and existing email. Can be a GatorCreator email or a GatorMail email. This will create a copy of the email and auto generate the name, "Campaign Name Time and Date".

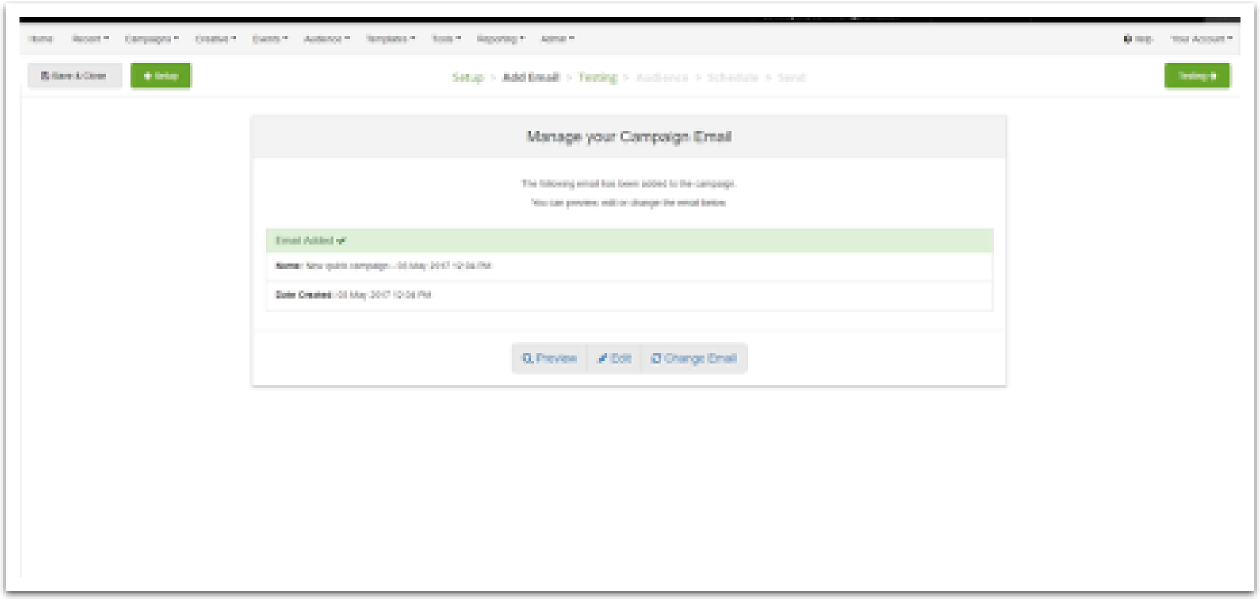


You cannot continue in the wizard until an email has been added to the campaign. If you try to continue you will be shown a validation message.

There is an optional folder selection where you can choose where to create or copy the new email.



When an email has been added to the campaign you will be shown the details of the email. You then have the following options.



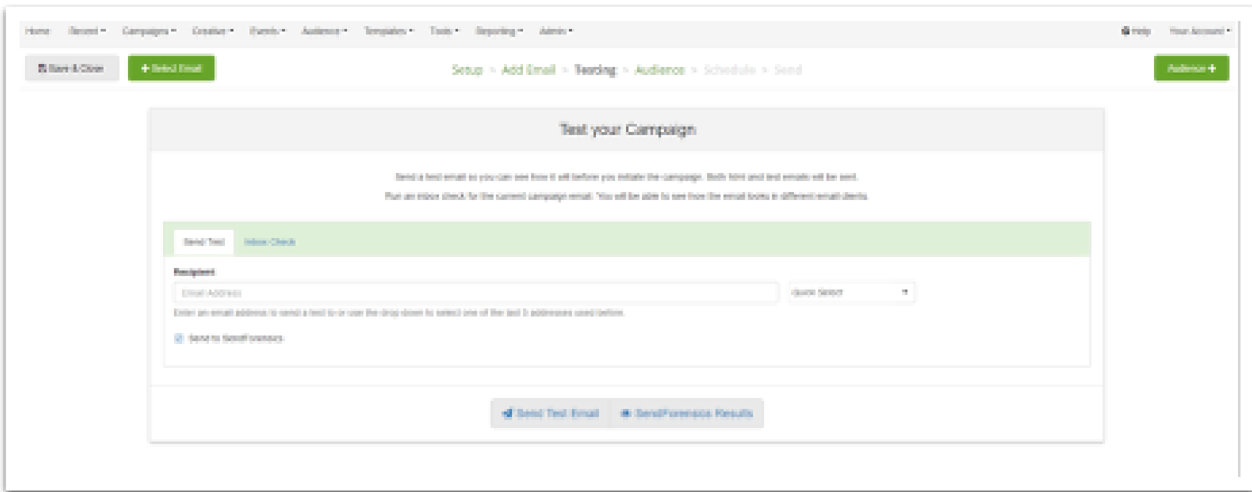
1. Preview Shows the preview modal of the email.
2. Edit The user can edit the email.
3. Change Email The user can change the email. When selected, they will be given the following options
    1. Cancel Cancel changing of the email and go back to the manage email page.
    2. New email Create a new email
    3. Copy Existing Copy and existing email

Testing

On this page, you can send a test email or a run an inbox check.

Send Test

The send test is a simplified version of the send test functionality in the advanced campaign screen.



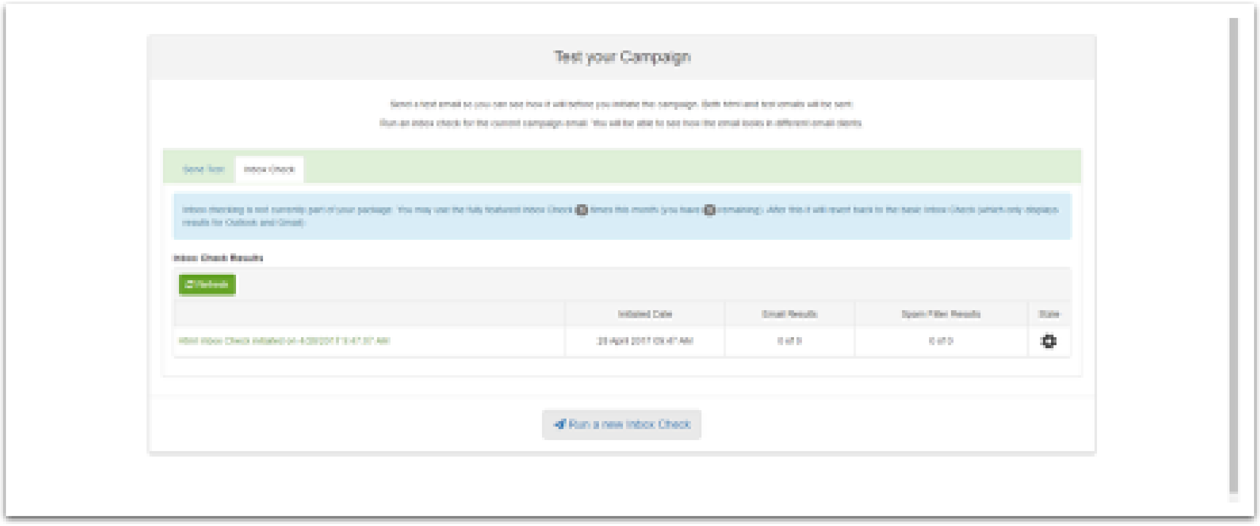
To send a test enter a name in the recipient text box and click on send test. Both html and text versions of the email will be sent.

There is an option to select a previously send test recipient using the drop down next to the text box. When you select the selected email address is added to the textbox.

You have the option to send the test email to send forensics. This option is enabled by default. You can view the results by clicking on the “SendForensics Results” button where you will be navigated to the send forensics screen.

Inbox Check

The inbox check is a simplified version to the advanced campaign screen. You cannot select a contact to test against you just can run inbox checks.

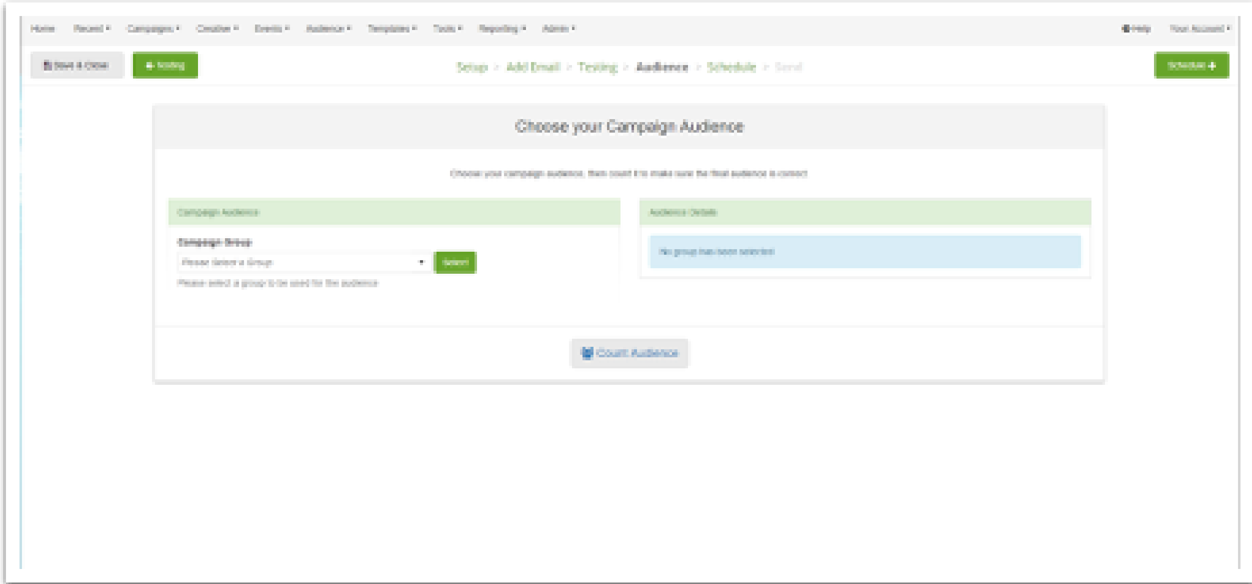


When an inbox check has been initiated there is a time limit until you can initiate another inbox check. This was a feature added recently to the advanced campaign screen as well.

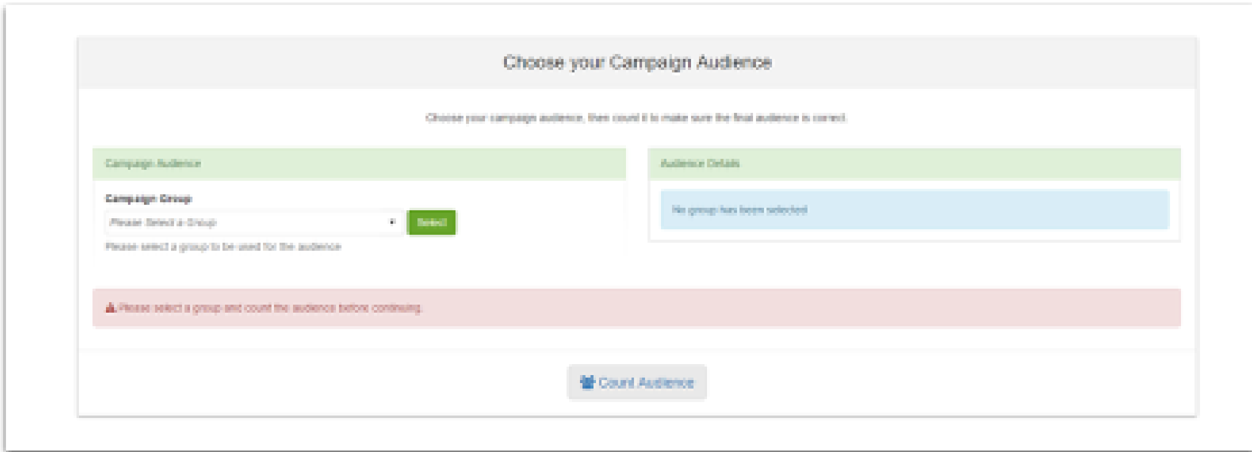
The difference of this inbox compared to the advanced campaign screen is that each inbox check is ran against the campaign email. If the user changes the campaign email no inbox check results will show until an inbox check has been initiated again.

Audience

On this page, you can set the audience for the campaign. You can only assign a group the campaign there is no selection criteria.

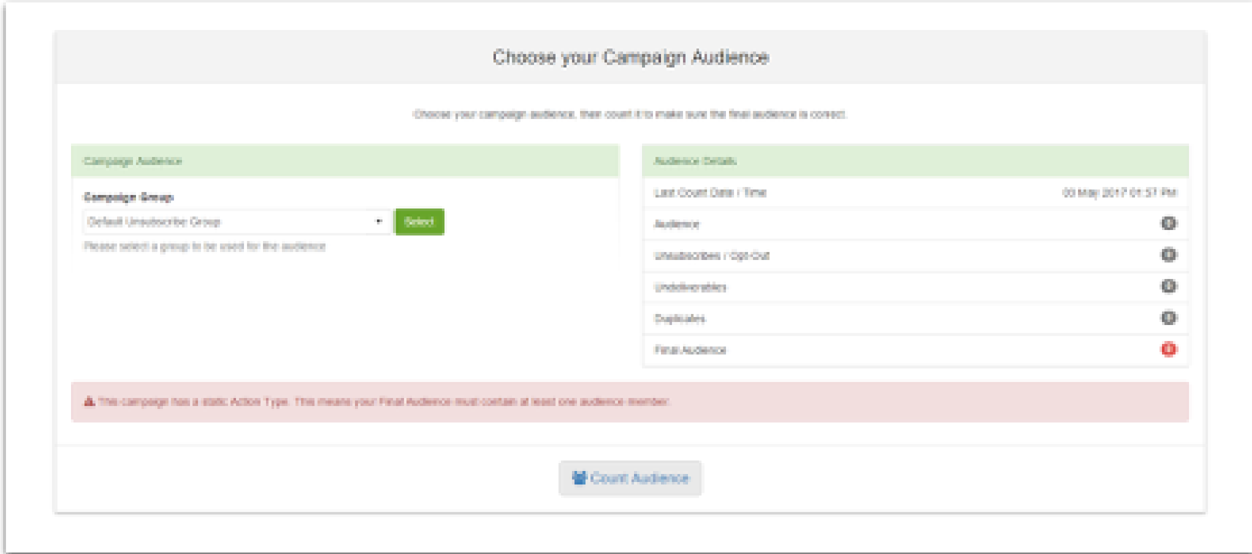


When you first visit the page, no group will be selected. If you try to continue, a validation message will appear informing you that you must select a group and count the audience before you continue.



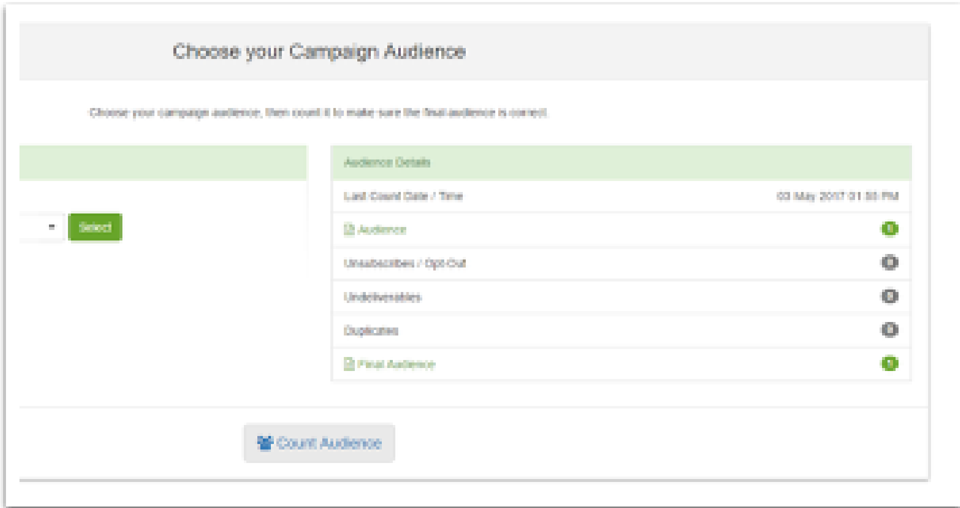
When you have selected a group, you must count the audience before you continue. Based on your action type the following requirements are applicable.

1. Static You cannot continue if the final audience count is zero.



2. Refresh non-recurring You can continue if the final audience is zero, this is valid for a refresh campaign.

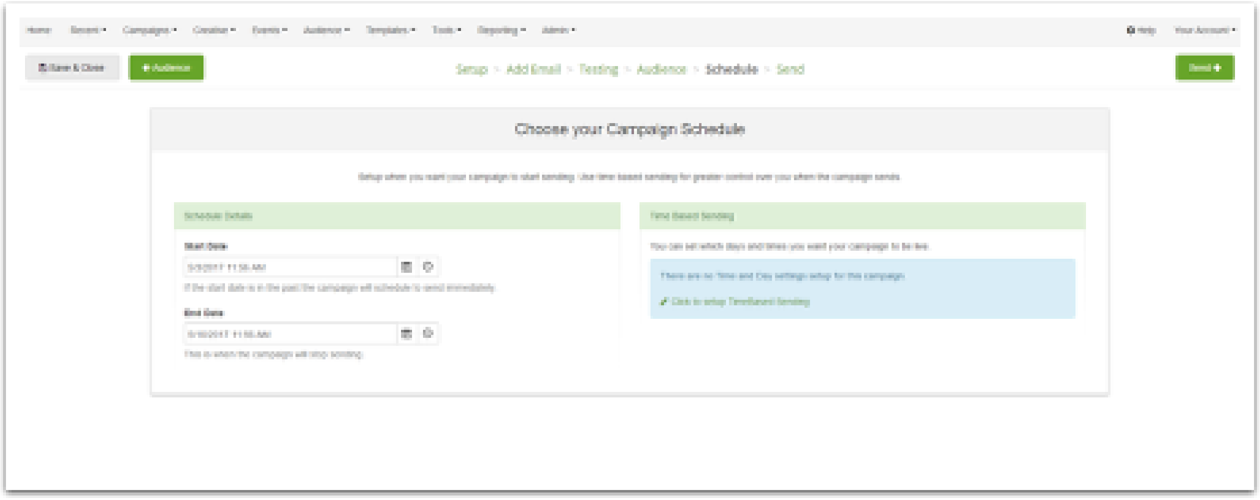
When you have counted the audience, the counts for the selected group will be displayed. You can export the counts by clicking on the totals names.



Whenever you change the group you must recount the audience. We do not automatically recount the audience when changing because counting the audience can take time depending on the audience count.

Schedule

This page is where you setup your campaign sending schedule.



Schedule Details

1. Start Date Set the start date of the campaign, this is when the campaign will start to send.
2. End Date Set the end date of the campaign, this is when the campaign will stop sending. The end date cannot be before the start date. If this happens a validation message appears and you cannot continue.

Time Based Sending

You can set time based sending for the campaign, where you can make your campaign only send email during certain periods.

If time based sending is setup in the campaign defaults these values will be loaded as default. If not, no time-based settings will be set.

Click on the link to setup time based sending. A modal will window will appear where you can set the details. When you save, and close these settings are applied to the campaign.

Send (Summary)

In quick campaign, there is no initiate check screen. We show a summary of the campaign details of the quick campaign.

The summary page is split into sections.

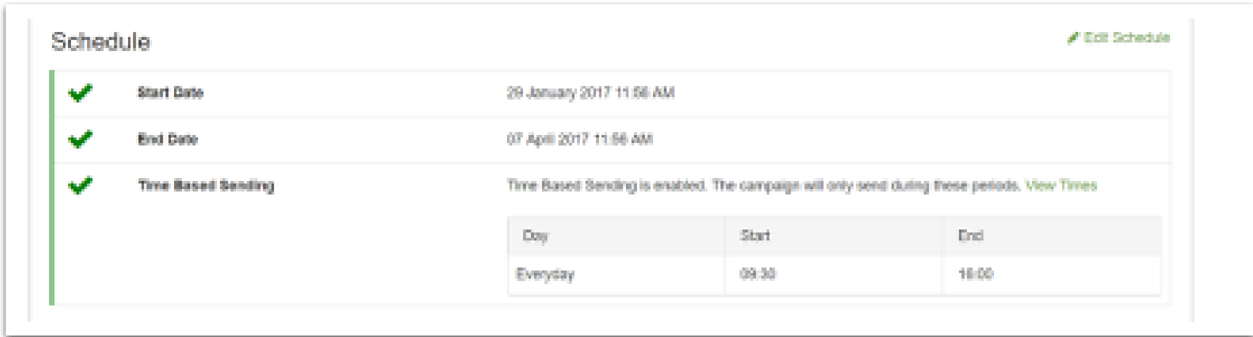
1. Campaign Details
    1. Subject Line
    2. Sender Email Address
    3. Reply Email Address Because this is optional if the user has not entered this a warning will be shown.
    4. Action Type
    5. Sender Alias Because this is optional if the user has not entered this a warning will be shown.
    6. Unsubscribe
    7. Send to a friend

    8. Approval Group this is only shown if the instance has campaign approval setup

2. Email Details
    1. Email Name
    2. Test Sends Displays a warning if the user has not sent any test emails. Otherwise a total for how many tests sends are displayed. This is per campaign email so if the user changes the campaign email the total is reset.
    3. Inbox Checks Displays a warning if the user has not run any inbox checks. Other a total is shown. This is per campaign email so if the user changes the campaign email the total is reset.

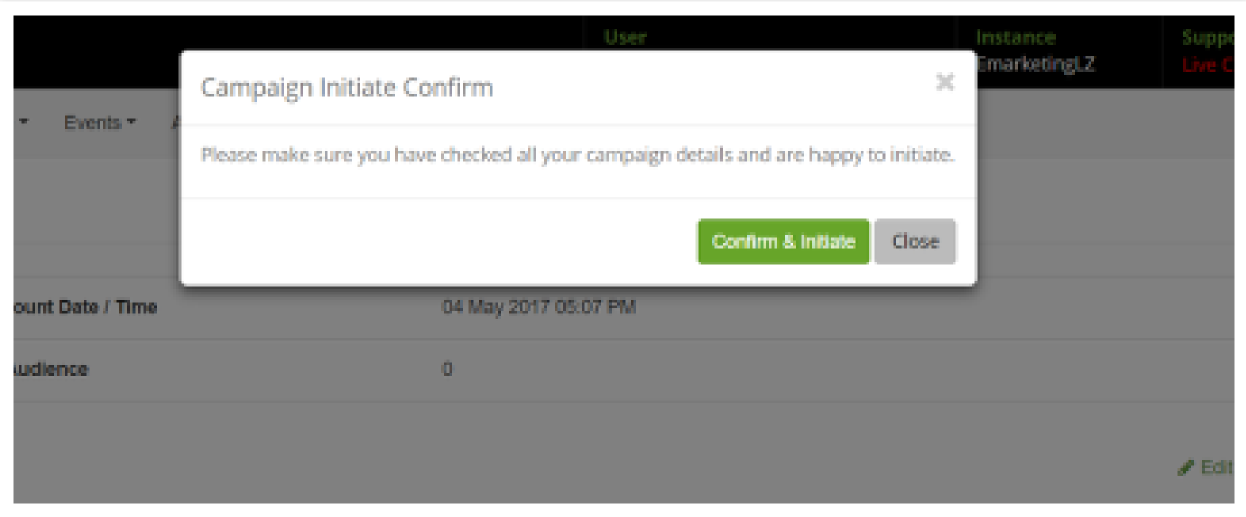
3. Audience Details
    1. Group
    2. Last count date time Shows the last time and date the audiences was counted.
    3. Final Audience

4. Schedule
    1. Start Date
    2. End Date
    3. Time based sending If the user has setup time based sending they can click on the "view times" link.



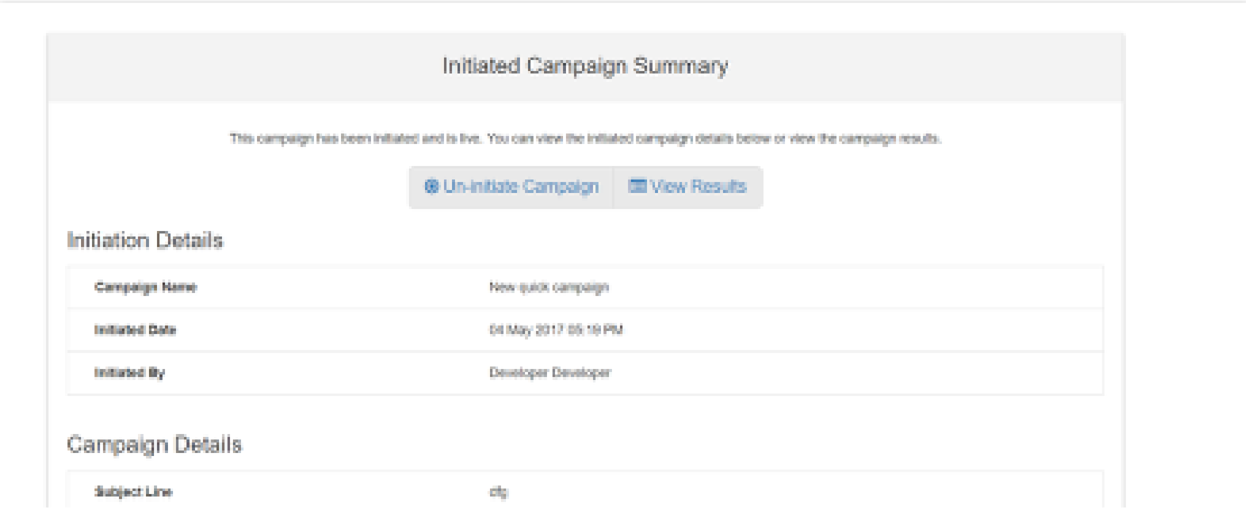
Initiate

To initiate the campaign there are two buttons on the page. At the top and bottom, when clicked a modal will appear asking the user to confirm they want to initiate the campaign.



Quick Campaign (initiate screen)

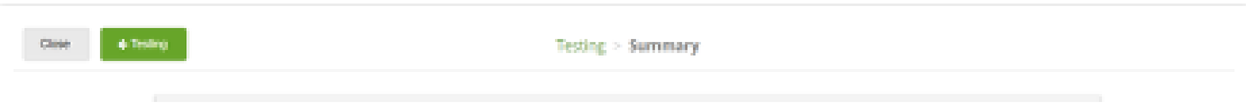
When the campaign has been initiated you can no longer edit the campaign. When you view the campaign via the campaign select grid you will be taken to the Initiated Campaign Summary page. This displays the summary details of the campaign.



You have the following options.

1. Un-initiate - If the campaign has not started to send then you can un-iniaite the campaign. If you decide to un-initiate, then you the campaign will go back to setup mode.
2. View results

You're able to test the campaign while its sending. There is an option in the top navigation bar.



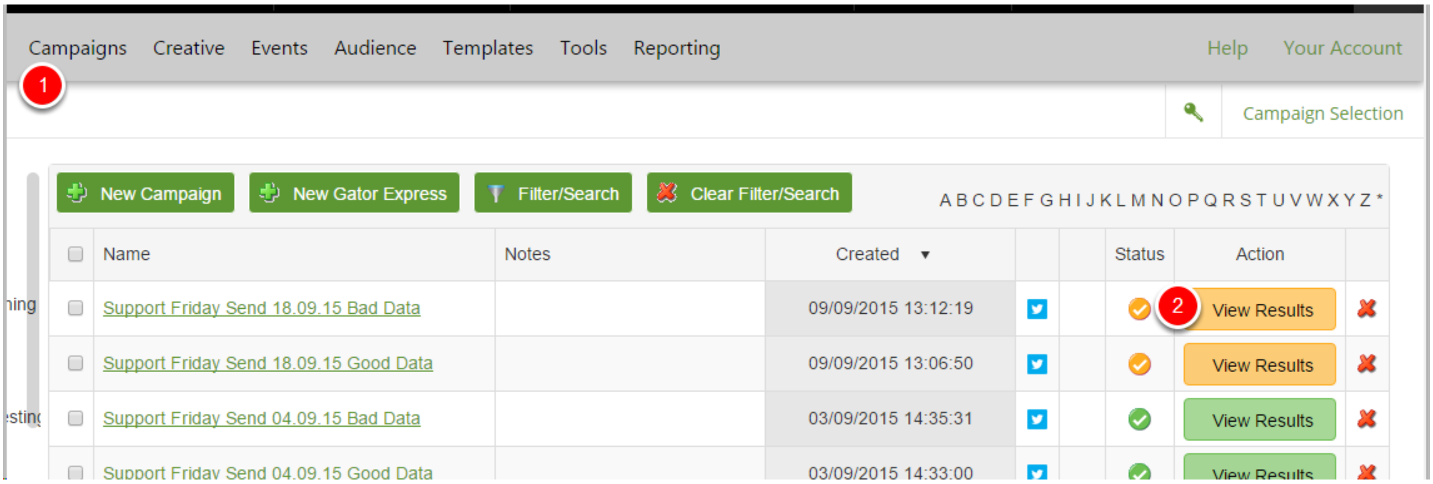
This has the same functionality as the test page from the quick campaign setup screen for both send test and inbox check.

Campaign Results

Result Screen Definitions

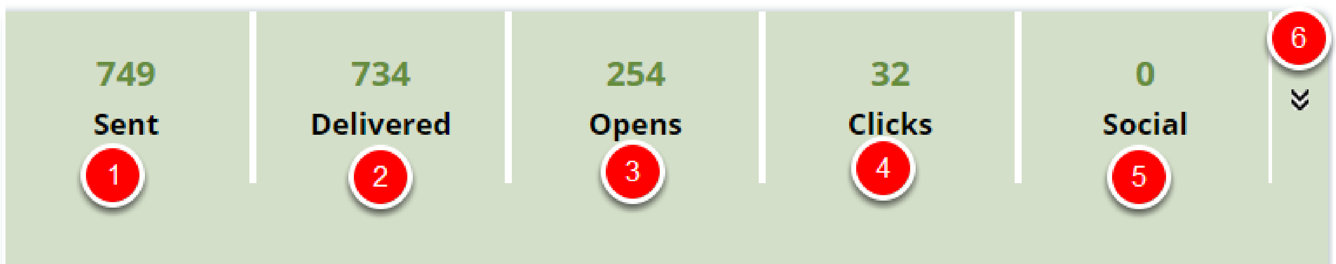
To access the results screen in CommuniGator, click into the 'Campaigns' section, and then click the 'View Results' button for the campaign you wish to look at. This will take you to the results screen for that specific campaign. This Article will take you through the overview of the results and their meaning.

Accessing Results



1. Campaign Tabs
2. View Results

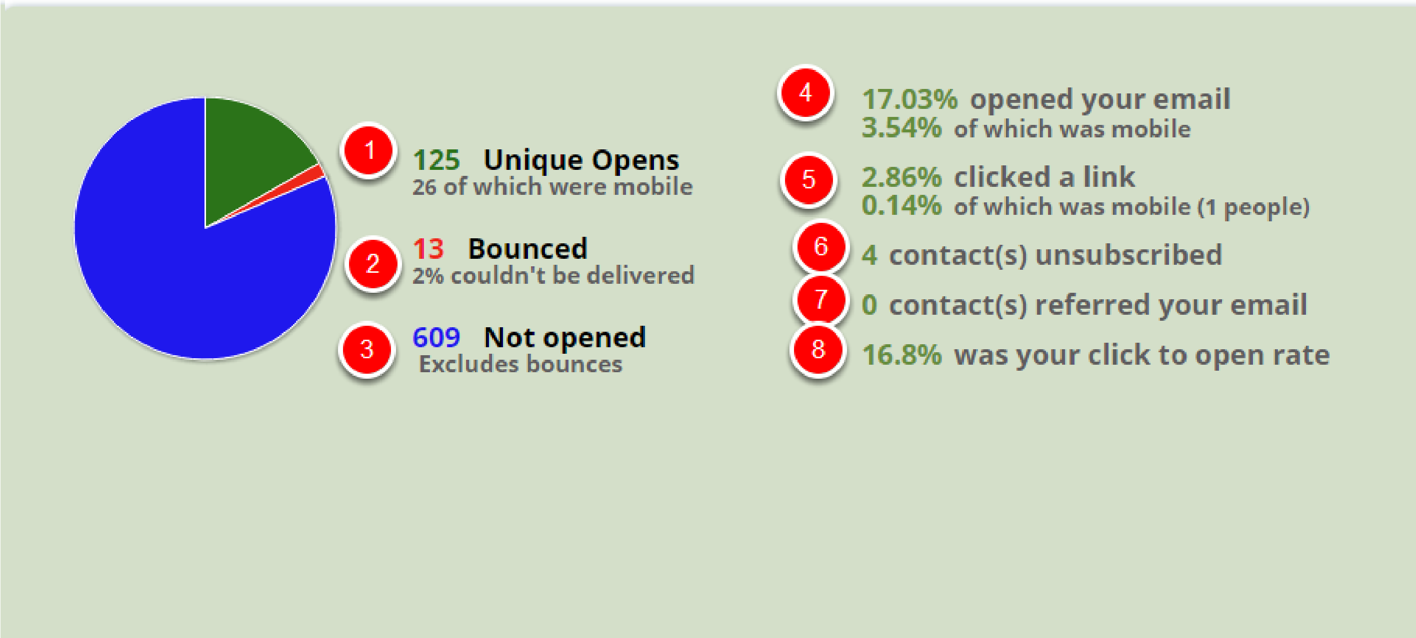
Top Bar



1. Total emails sent by this campaign
2. How many of your emails were delivered - Some emails may not be delivered due to bounces or technical issues.
3. How many of your emails were opened - this counts multiple opens for one user, not just unique opens

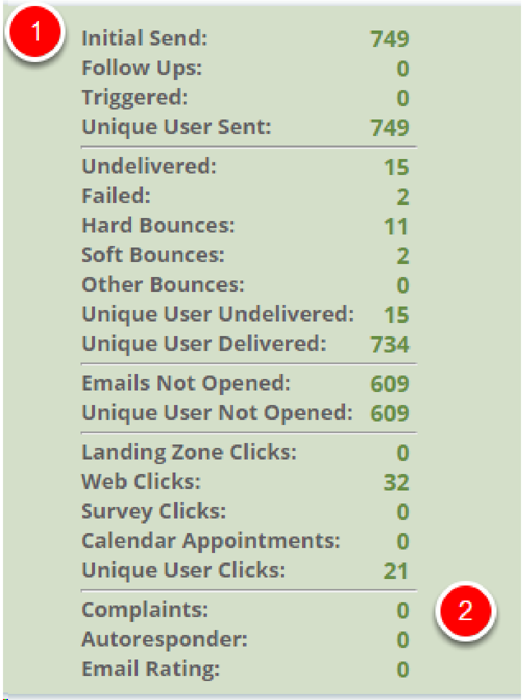
4. How many clicks on your email - Total clicks (again, not unique clicks)
5. How many people have clicked on your social media icons (only if inserted by our social media button in the editor)
6. Click here for a drop down/ overview of the results

Overview



1. How many unique opens of your email, (individual email addresses and not how many times opened)
2. How many of your emails bounced - this includes hard,soft and other bounces
3. How many of your emails not opened, this counts for unique opens
4. Overall percentage of emails opened, including mobile phones.e.g. 45.71% opened in which 5.71% mobile, this means 40% of your emails opened on a computer. This is for unique opens. This is worked out by dividing unique opens by delivered x 100
5. Overall percentage of clicks on your email. This is for unique clicks. This is worked out by dividing unique clicks by delivered x 100
6. Contacts who have unsubscribed from this campaign
7. Contacts who have referred your email (used the send to a friend function)
8. Overall percentage of your click to open rate. This would be your unique clicks divided by your unique opens x 100.

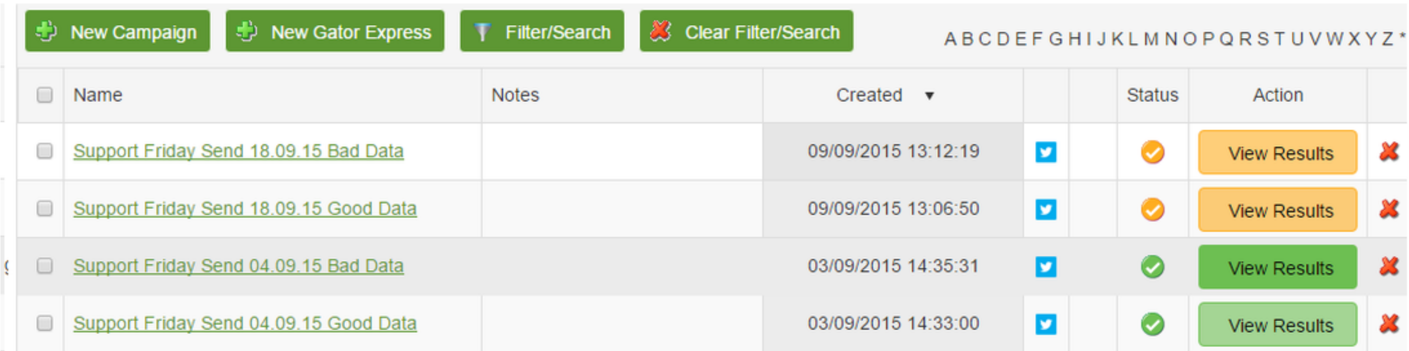
Other Options



1. This is a list breaking down everything in your campaign, such as how many landing zone clicks, how many bounces specifying hard or soft or other. If you have a follow up attached to your campaign this is also how you view how many have gone out.
2. This will also show you if anyone has complained about your email (marked as junk)

Overview Screen

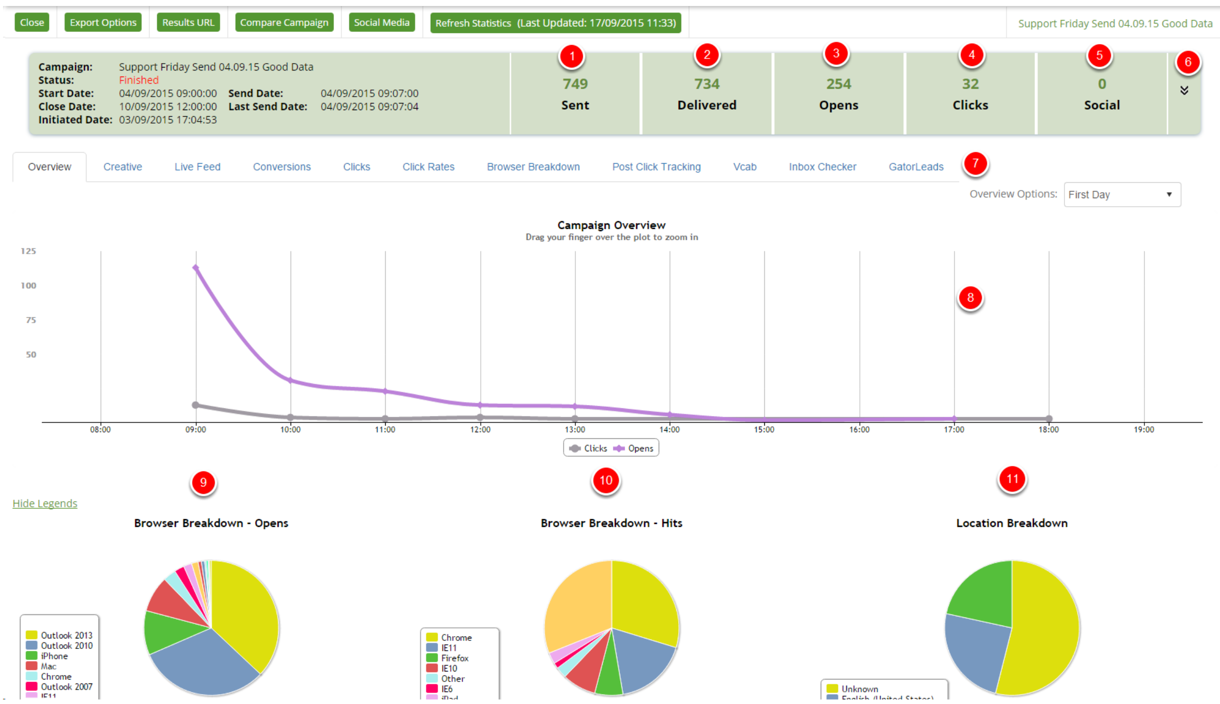
Select the results from the relevant campaign



In Communigator click on the campaigns tab.

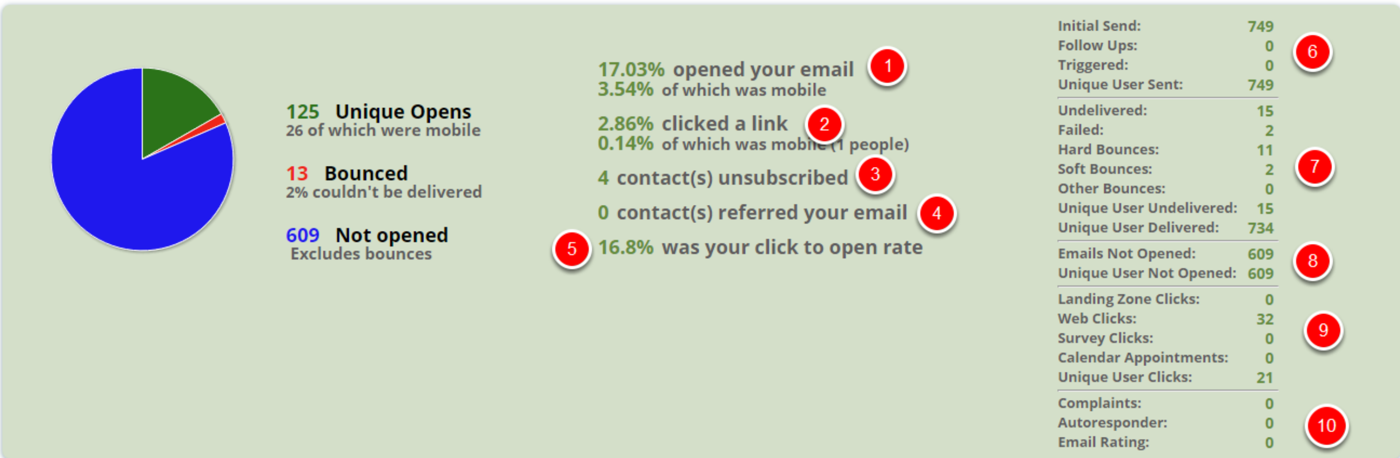
Once a campaign has been initiated the option that appears to the right hand side will change from "initiate" to "results" click this button to view the results screen.

The main overview screen



1. Displays the number of emails that have been sent.
2. Shows the number of emails that have been delivered.
3. The number of opens that have been achieved.
4. The number of clicks on this specific campaign.
5. Shows the number of people that clicked on the the campaign on Twitter.
6. Will show a drop down list with more results (see below).
7. Shows the other results options (explained further in other screen steps articles).
8. The graph displays the times that clicks and opens have been achieved on the campaign.
9. Shows the browser that has been used to open the email.
10. Shows the browser that has been used by people that have clicked on the email.
11. Displays the location that has been registered for the IP address of the device that has been used to take action on the email.

Results drop down list

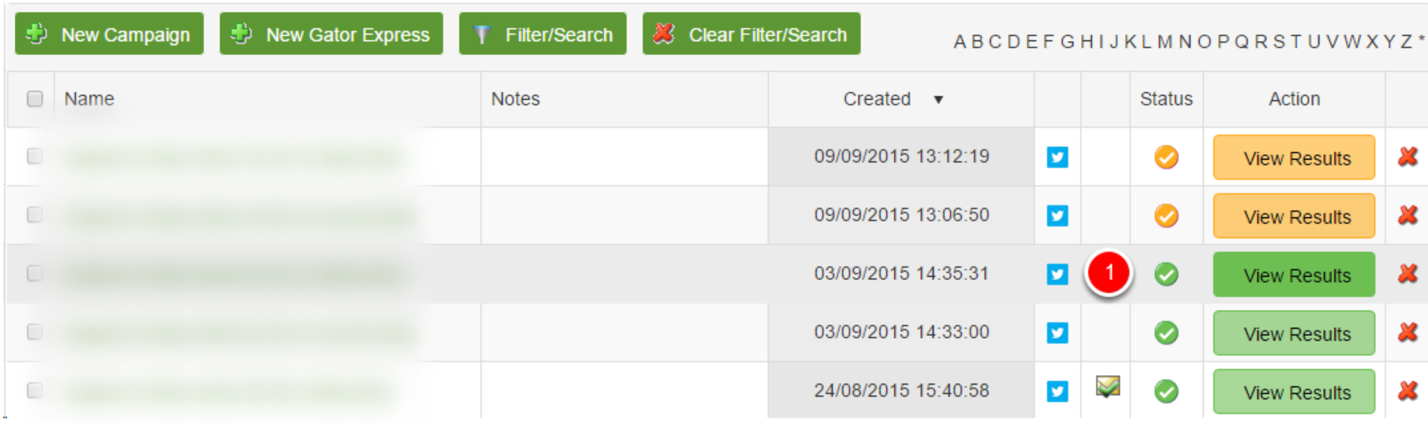


1. Shows the percentage of recipients that have opened the email, with the percentage of which was mobile.
2. Shows the percentage that have clicked a link, and the percentage of which were mobile clicks.
3. Displays the number of recipients that have unsubscribed.
4. Shows the number of people that have shared the email using the "send to a friend" icon.
5. Displays the percentage of people, that have opened the email, that have also clicked on the campaign.
6. Shows the original amount sent, how many emails were sent as a follow up, the number that were sent as a trigger and the number sent to unique recipients.
7. The number of emails that have bounced or failed the number of individuals that have not received the email and the overall number of unique emails that have been delivered.
8. Emails not opened and a percentage of unique users not opened.
9. Displays to types of links that have been clicked by recipients.
10. Shows the number that have clicked on the complaint option that is available using email clients such as AOL.

Creative

This section will show you how to review your creative performance once it deploys.

Campaign



1. To access the results, go to the campaign tab and find your campaign, once you find it click on the "View Results" button - as seen above

Creative Tab

1. Once on the results click the "Creative" button along the top of the results - as seen above

Clicks

1. Each link on the creative will have a summary of the total clicks, and the percentage that click contributes to the total click rate %

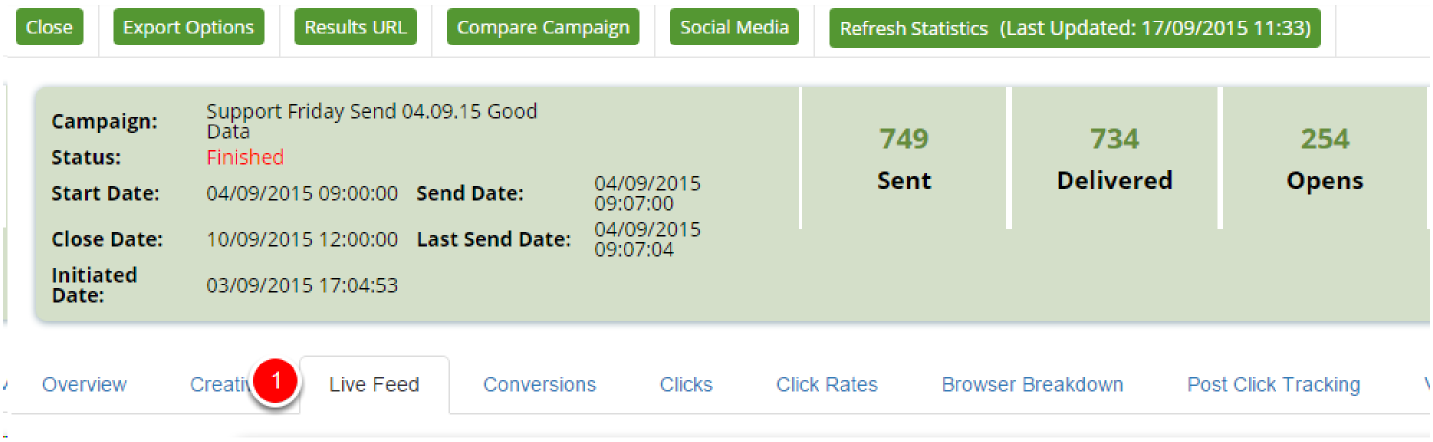
Live Feed

The live feed can be found when viewing the campaign results; Live Feed is the 3rd tab along.

The live feed gives you information such as opens, click rates, device breakdown, and user-specific records of interactions with your campaign.

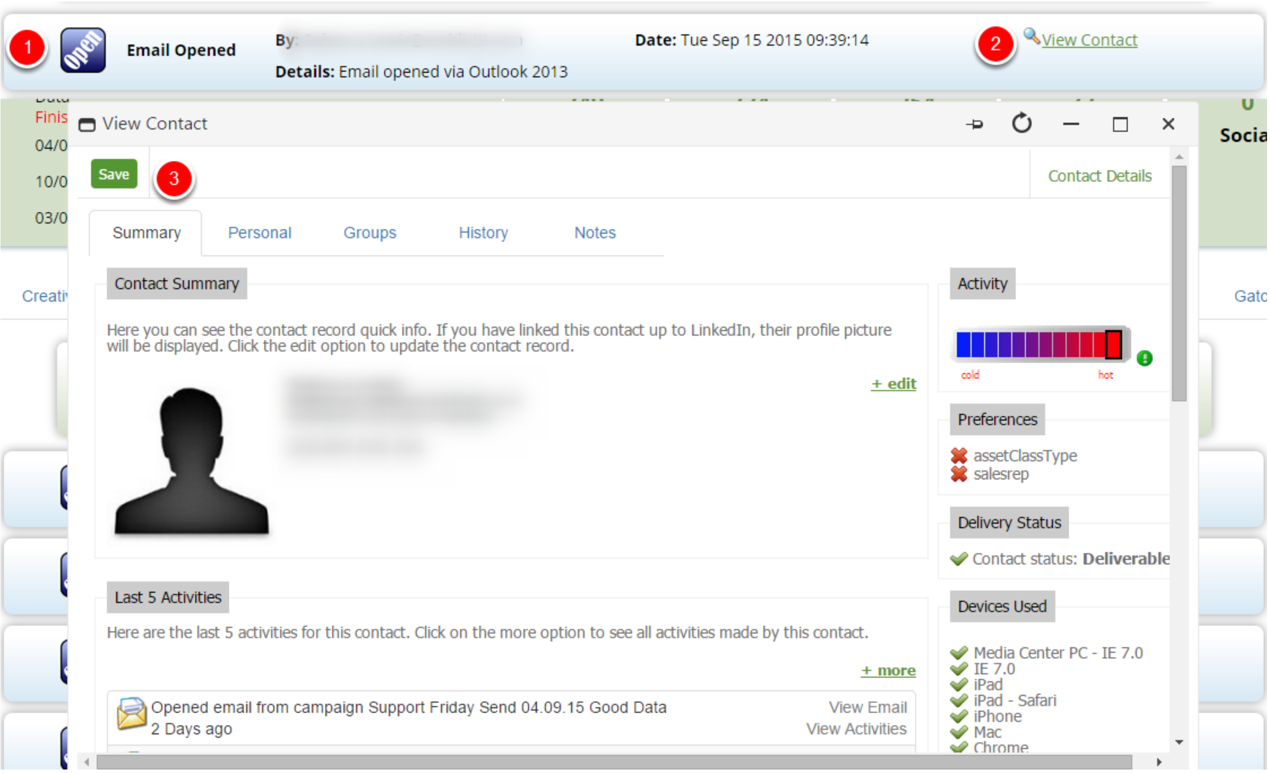
NOTE: The live feed will continue to run even when campaign has closed.

Accessing the Live Feed



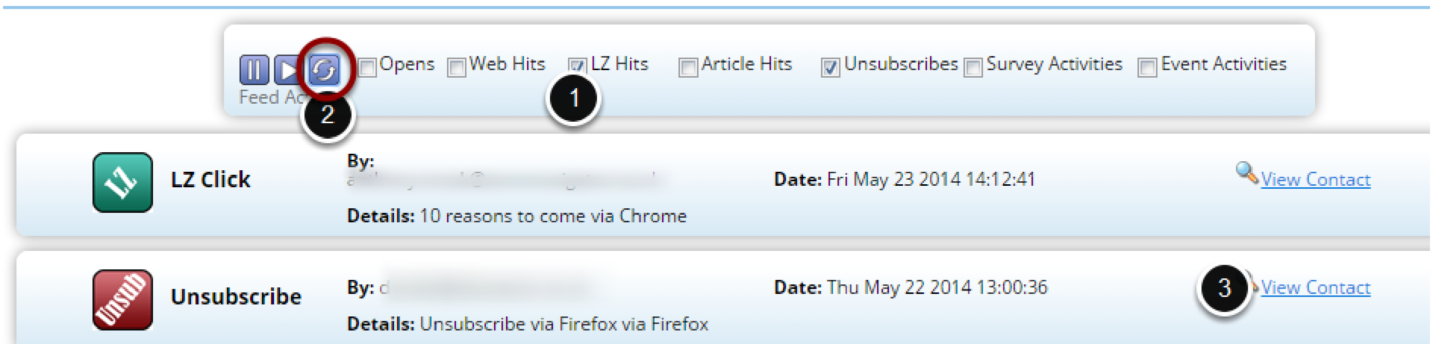
1. The live feed tab is located in the campaign results

Live Feed Overview



1. This is the live feed overview, which shows you statistic about your campaign, such as web clicks, opens or landing zone clicks.
2. If you want to view the contact on the live feed click here
3. This brings up the contact record, which takes you to the Summary page where you can view the contact summary. Last 5 activities and last 5 campaigns that were sent to this contact.

Specifying

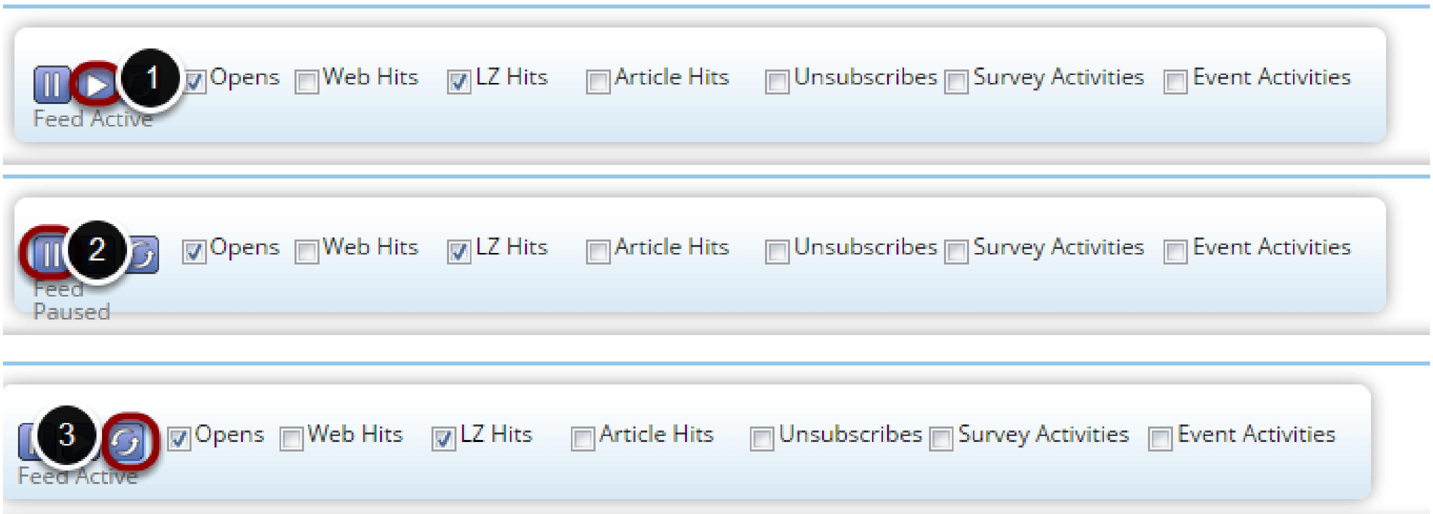


1. If you want to view specific results on the live feed, such as landing zone clicks and unsubscribes, select the preferences you would like.

2. Press the refresh buttons to view your results

3. View the contact record.

Actions



1. When the play button is clicked, this means that the feed is active.

2. When the pause button is clicked, this means that the Feed has been paused.

3. When the refresh button is clicked, the Feed is active again and updated.

Meanings

1. Email opened

2. Web link clicked

3. Landing Zone link clicked

4. Article link clicked

5. Unsubscribed

6. Survey completed

7.Event Booking completed

8. Event booking form opened

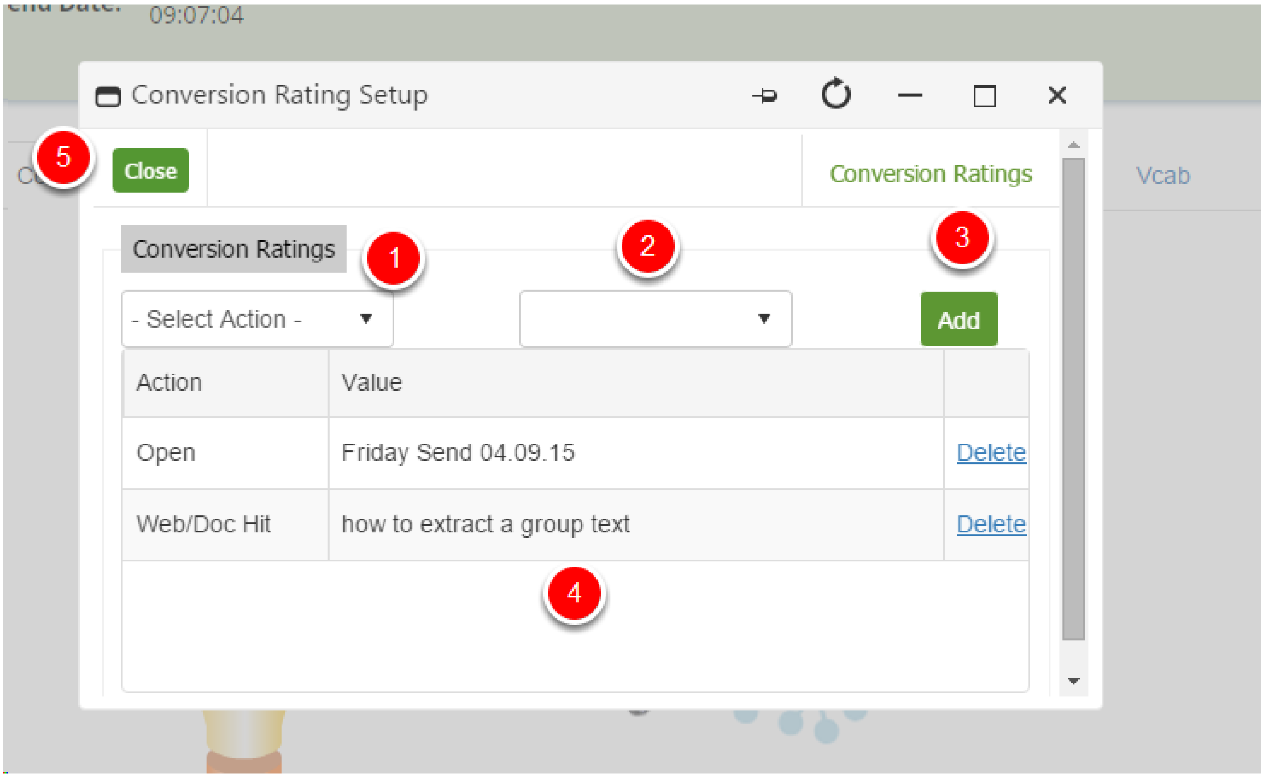
Conversions

The conversions screen allows you to drill down into the results of a campaign. This powerful tool can have multiple rules to really get into the core of your audience. The standard setup for conversions is Sent -> Delivered -> Opens, but this can be customised to whatever matched your needs.

Campaign Conversions Screen

1. This block is the top of the conversion chart, it will usually be sent emails.
2. This is the second part of the chart, in this case emails delivered.
3. This is the last part of the chart, in this case emails opened.
4. In order to set up your own customised ruleset for a campaign's conversions, click this image.

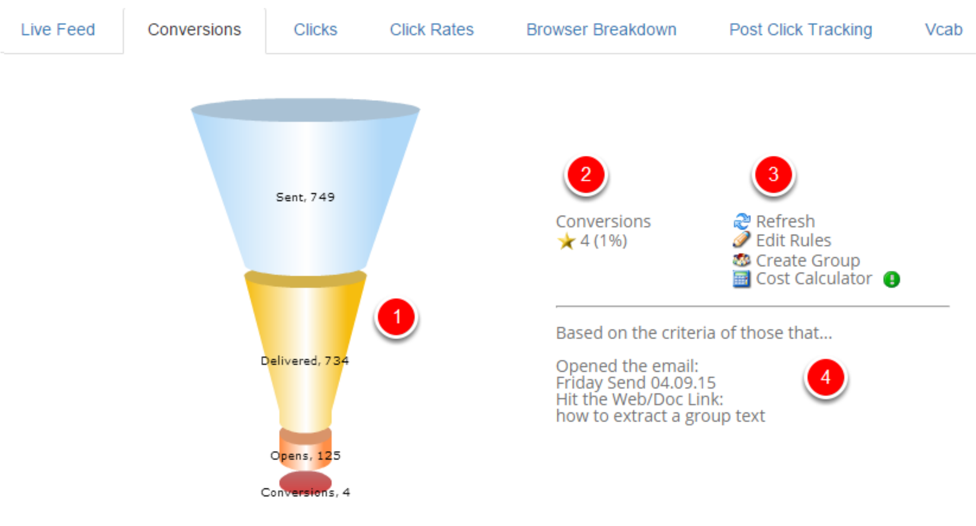
Campaign Conversions Screen 2



This is the screen that you can customise your ruleset.

1. This is the action you select for the conversion (LZ hit, web hit etc).
2. This is the value of the action (Name of the LZ, link etc).
3. Click add to add the rule.
4. All added rules will appear here.
5. When you are finished, click close to go back to the screen.

Campaign Conversions Screen 3

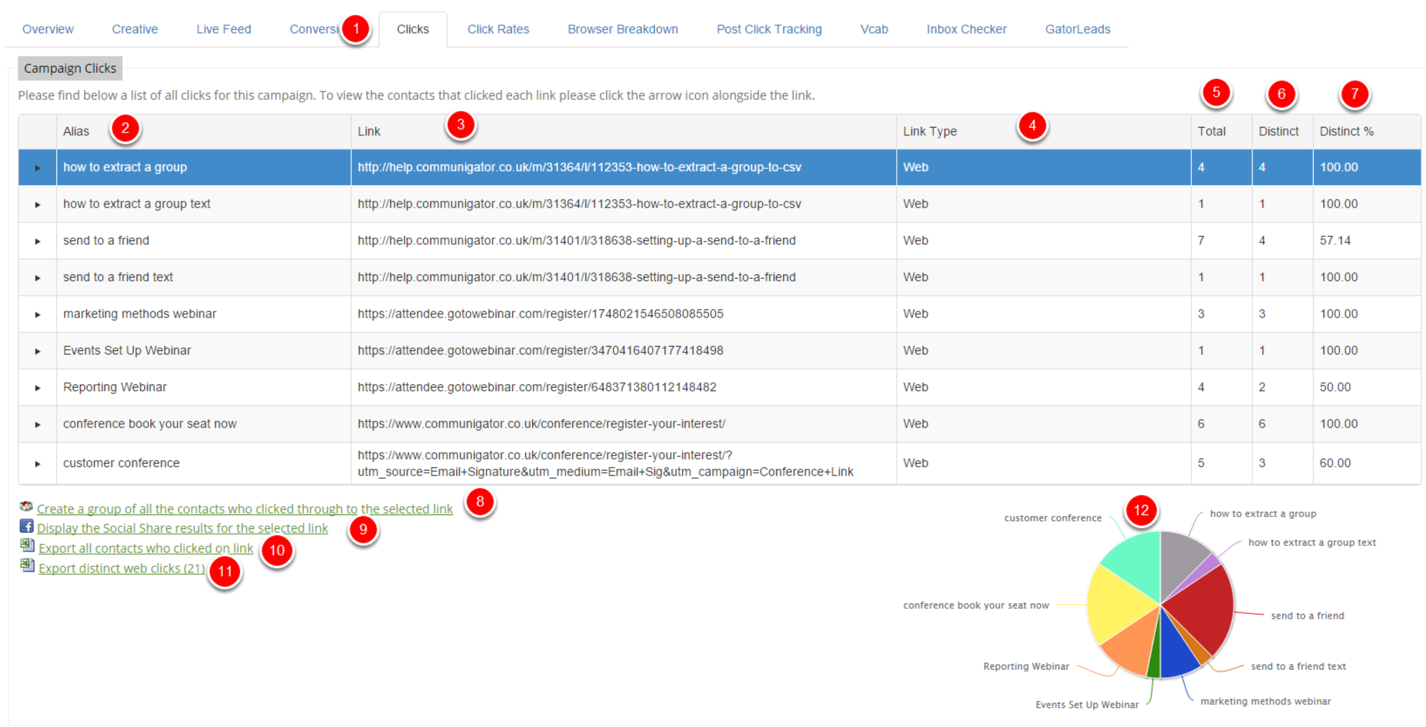


When you come back to the conversions screen, hit refresh to update the chart.

1. The new chart will be displayed here.
2. The conversions show the amount of contacts that fulfilled the ruleset.
3. These buttons allow you to do several things. Refresh recreates the visual graph, Edit rules allows you to change the ruleset you have created. Create group will create a group within CommuniGator based on the ruleset. The cost calculator allows you to put the total cost of the campaign in, and it will work out the cost per conversion.
4. The ruleset will be displayed here.

Clicks

The section allows you to view the clicks for your campaign.



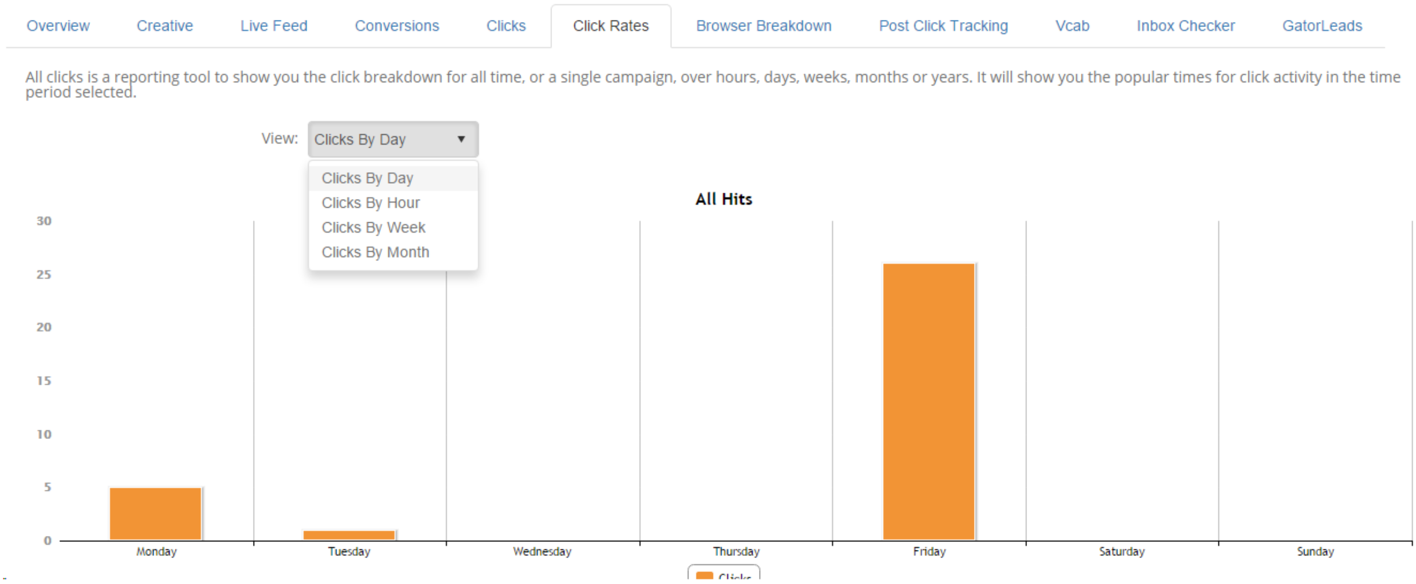
	Alias	Link	Link Type	Total	Distinct	Distinct %
▸	how to extract a group	http://help.communigator.co.uk/m/31364/l/112353-how-to-extract-a-group-to-csv	Web	4	4	100.00
▸	how to extract a group text	http://help.communigator.co.uk/m/31364/l/112353-how-to-extract-a-group-to-csv	Web	1	1	100.00
▸	send to a friend	http://help.communigator.co.uk/m/31401/l/318638-setting-up-a-send-to-a-friend	Web	7	4	57.14
▸	send to a friend text	http://help.communigator.co.uk/m/31401/l/318638-setting-up-a-send-to-a-friend	Web	1	1	100.00
▸	marketing methods webinar	https://attendee.gotowebinar.com/register/1748021546508085505	Web	3	3	100.00
▸	Events Set Up Webinar	https://attendee.gotowebinar.com/register/3470416407177418498	Web	1	1	100.00
▸	Reporting Webinar	https://attendee.gotowebinar.com/register/648371380112148482	Web	4	2	50.00
▸	conference book your seat now	https://www.communigator.co.uk/conference/register-your-interest/	Web	6	6	100.00
▸	customer conference	https://www.communigator.co.uk/conference/register-your-interest/?utm_source=Email+Signature&utm_medium=Email+Sig&utm_campaign=Conference+Link	Web	5	3	60.00

1. Clicks Tab
2. The Allias is the name that you have referred to the link
3. The Link that someone has clicked on
4. Where the link takes the user
5. The Total amount of clicks on the link
6. Distinct is the same as unique clicks, this shows you how many of the amount of individual users whom have clicked the link , regardless of how many times they clicked the particular link.
7. A percentage that is made up of Total clicks/Distinct clicks.
8. Allows the user to create a particular group of contacts when people have clicked through to the selected link
9. Allows the user to share on social networks the results for the selected link
10. Downloads all the contacts to an Excel CSV file whom have clicked on a link within the campaign
11. Downloads all the Contacts to an Excel CSV file whom are a distinct (Unique) click on the web clicks.
12. It's a click break down in a pie chart form.

Click Rates

The Click Rates tab shows you when people have opened the email on a timeline. You can change the view settings if desired. Here is an example...

Click Rates



You can view the click rates of the campaign with the following views:

Clicks by Day

Clicks by Hour

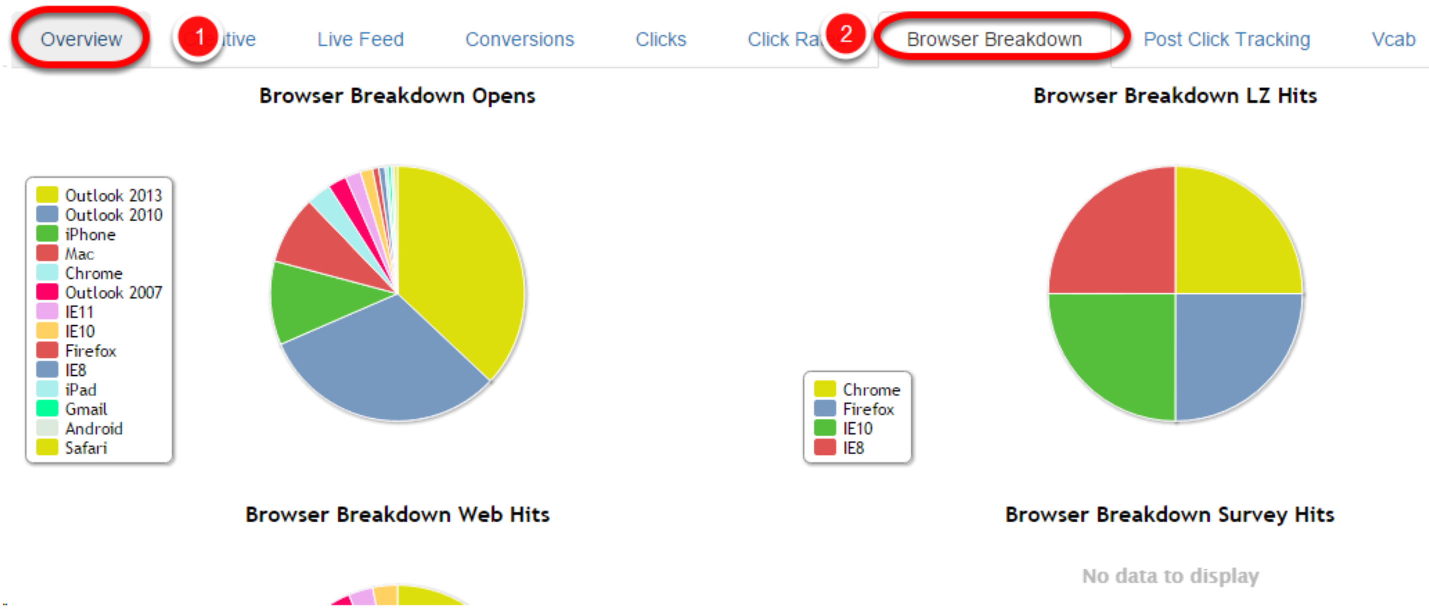
Clicks by Week

Clicks by Month

Campaign Results - Browser Breakdown

This section of campaign results gives you insight into the browsers used to view your email.

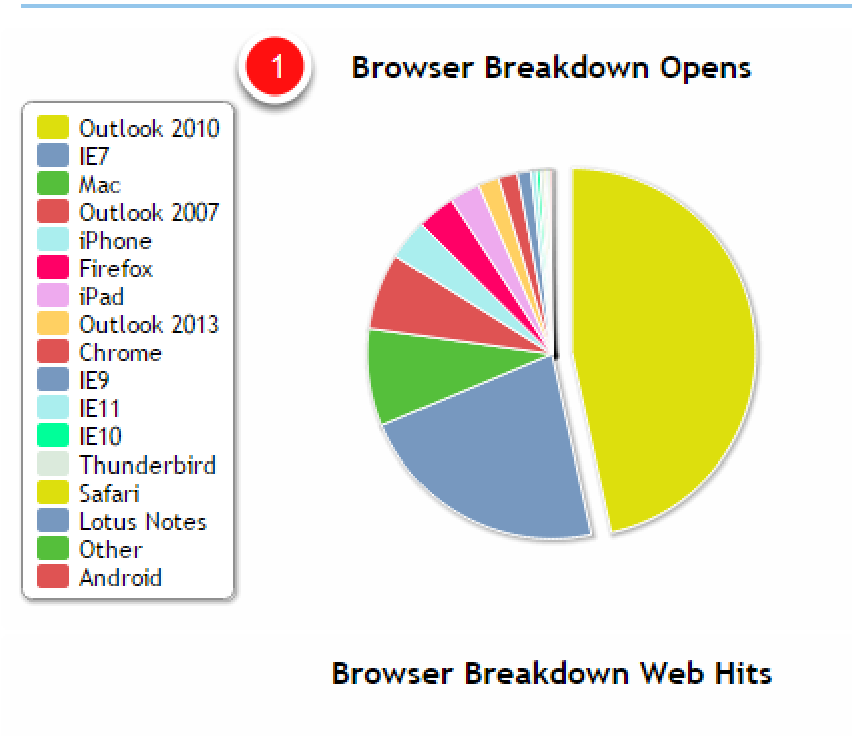
Accessing Browser Breakdown



There are two ways of viewing browser breakdown.

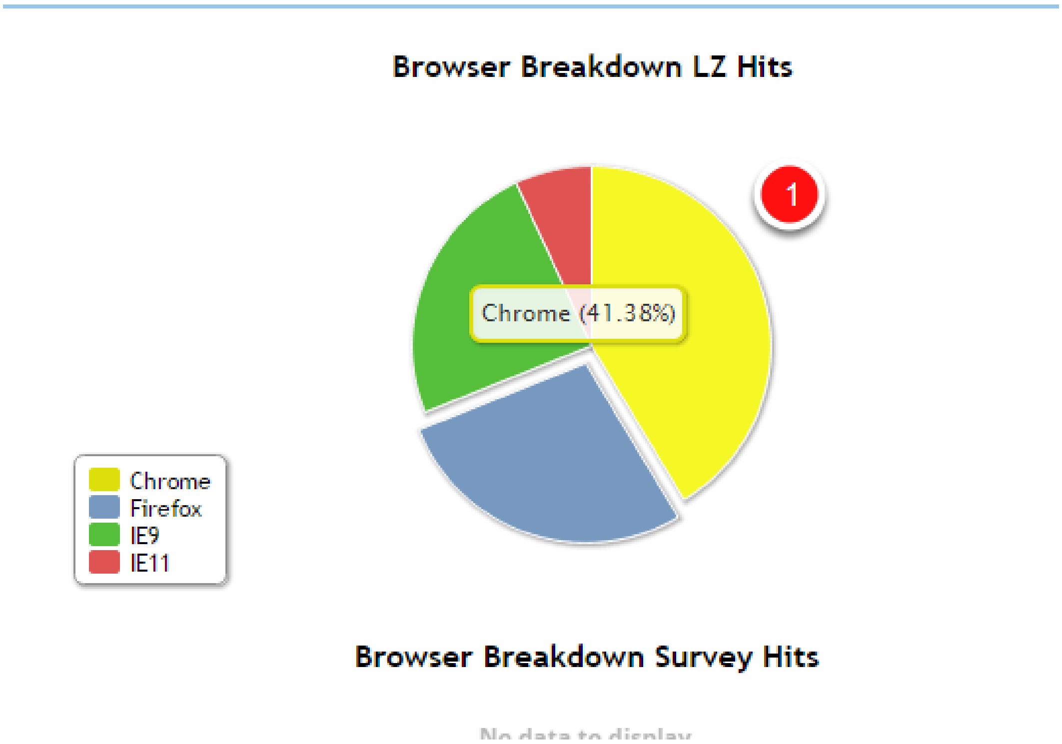
1. Overview Tab
2. Browser Breakdown Tab

Opens



1. This shows you a list of browsers that your email has been opened with.

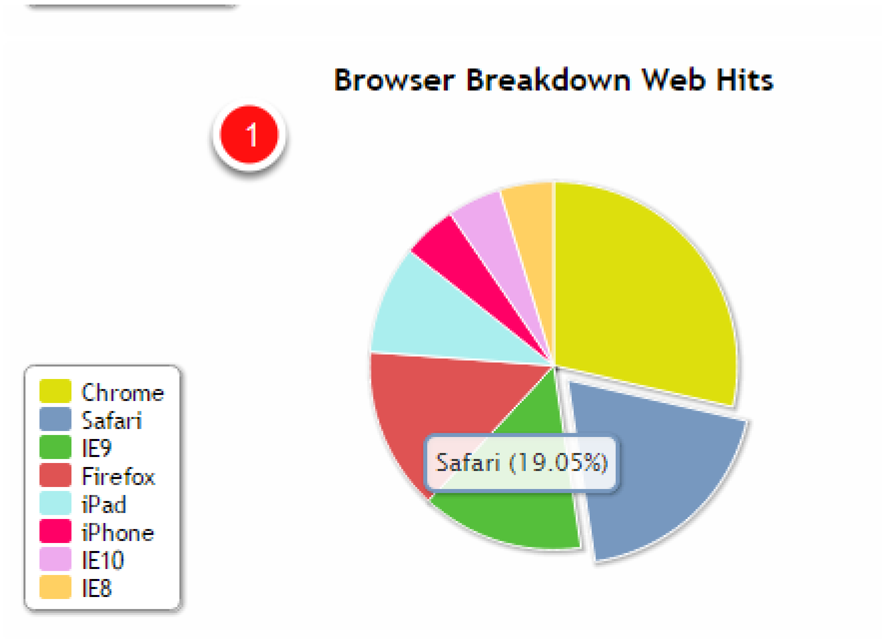
Landing Zone Hits



1. This shows you a list of the browsers used to open your landing zone.

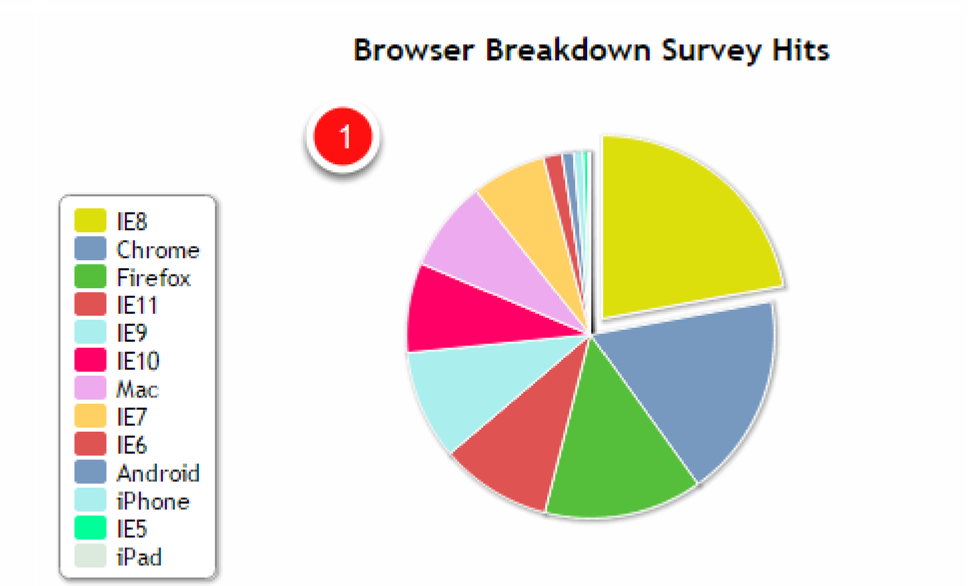
Note: hovering over the section tells you the browser and the percentage, as in the example above.

Web Hits



1. This shows you a list of used to open your links.

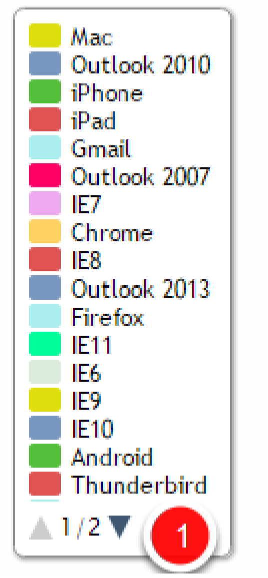
Survey Hits



1. This shows you a list of browsers that your surveys have been accessed through.

Note: If you click on a section in the graph this separates it from the rest of the graph, as in the example above.

List

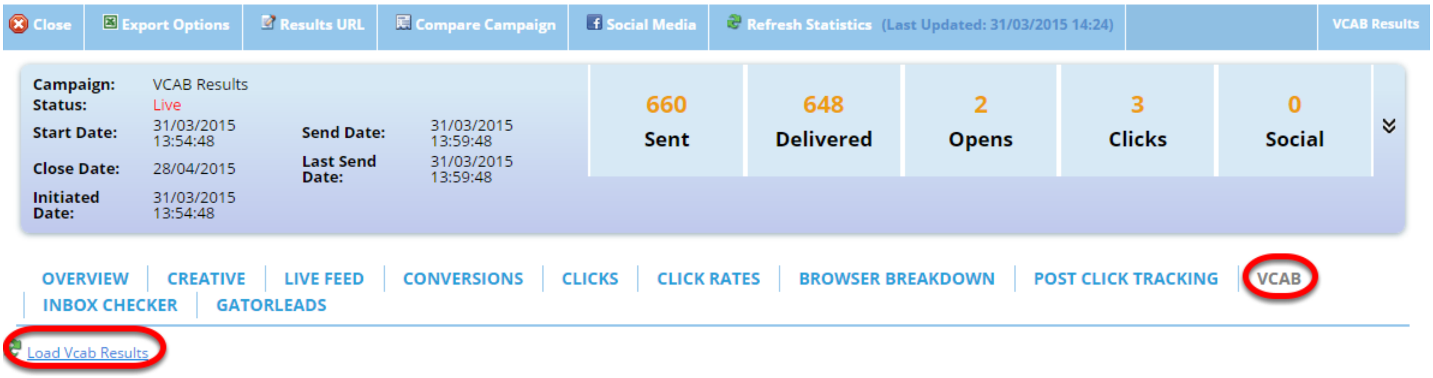


1. If you have a long list of browsers, clicking on the down arrow takes you through the pages of the list.

Results - VCAB

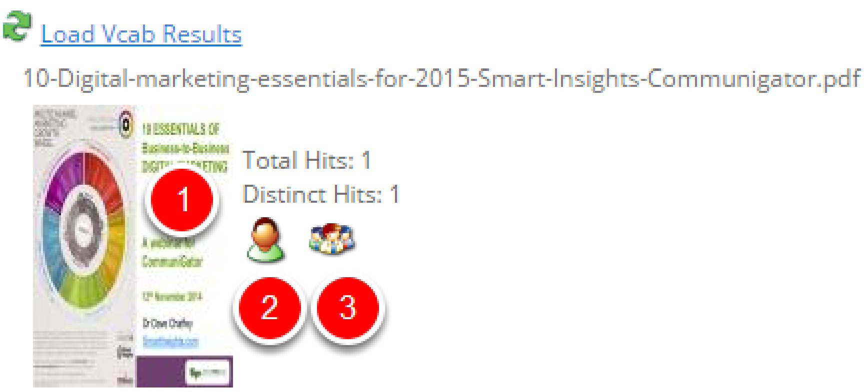
If you are using a VCAB in your CommuniGator campaigns, you can gather results based on which who has engaged with your document, and which pages they viewed.

VCAB Results



To begin, click on the VCAB tab. This will provide you with the option to load Vcab results; click on the 'Load VCAB Results' button.

Page Views



This will then provide you with the front cover of the VCAB and the total amount of hits and unique clicks.

1) If you click on the front cover, you will be able to see how many people have viewed the page.

2) If you would like to view the contacts that have clicked the page in VCAB, click this icon.

3) If you would like to create a group based on contacts opening a page, you can also do this by clicking on the icon.

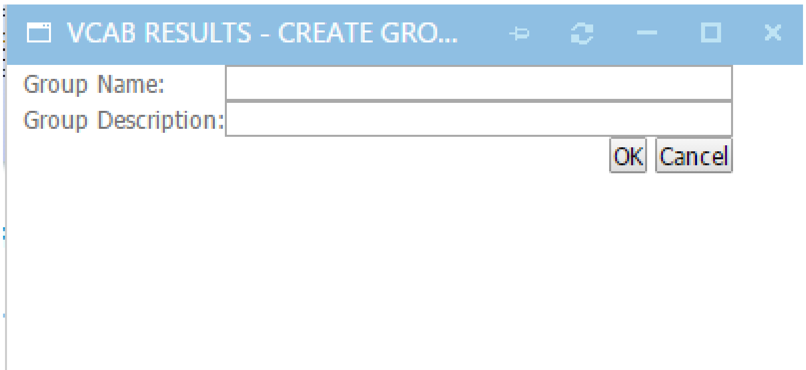
Viewing Pages

Clicking on the VCAB cover will take you through to a preview of each page which allows you to to see how many people have viewed the page. You can also move the contacts into a group depending on the page they have clicked on.

Viewing contacts

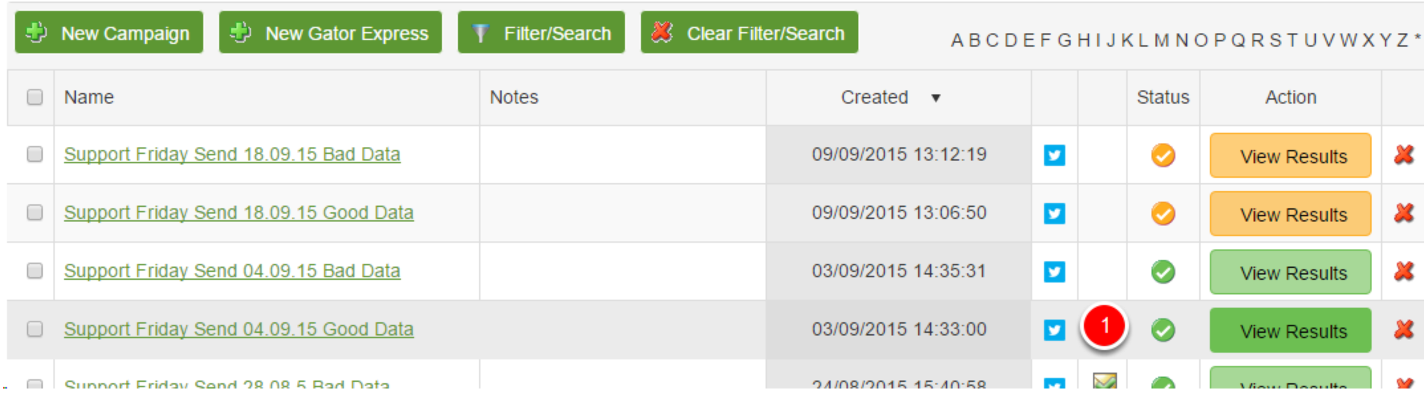
If you click on the area which displays the total hits, you will be able to view a list of people whom have opened the VCAB brochure. If you would like to export this to Excel, simply click the 'Export to Excel' button.

Creating a group based on hits.

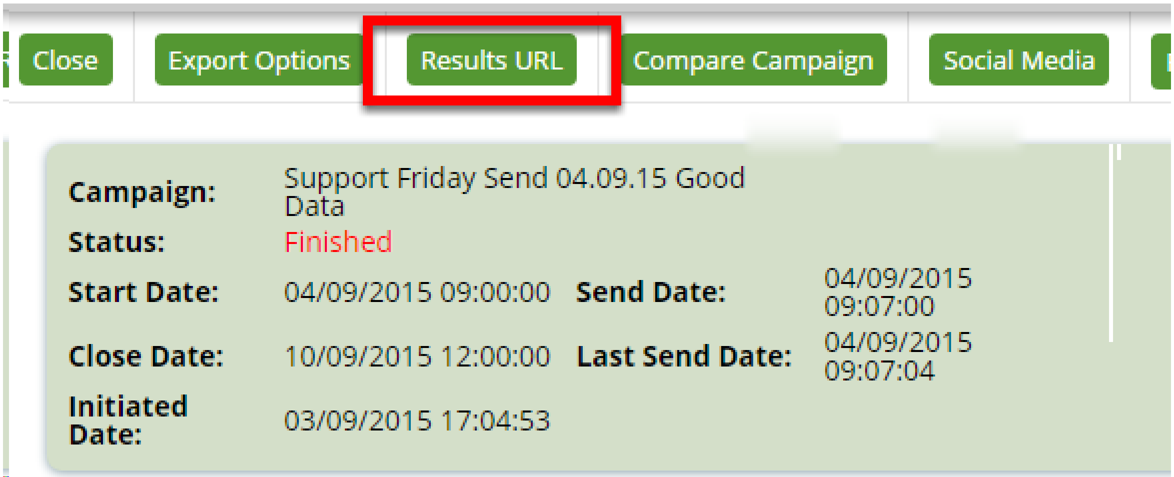


If you click on the icon to move the contacts into a group in CommuniGator, you have the option to enter a name and description for the group. When you are finished, click 'Ok,' and you're done! If a contact views a VCAB page after the group has been created it will pass the contact record though to that group.

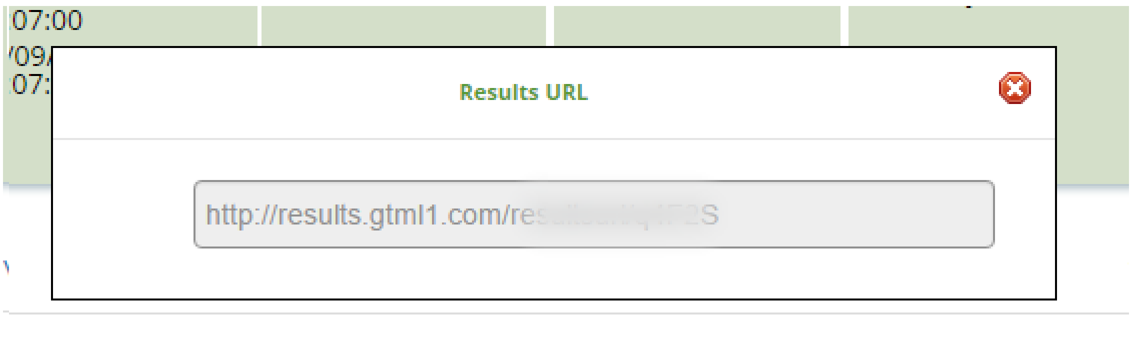
Results URL



1. To access the results URL, go to the campaign tab and find your campaign. Click on the "View Results" button - as seen above



Inside the results screen, click the "Results URL" button along the top



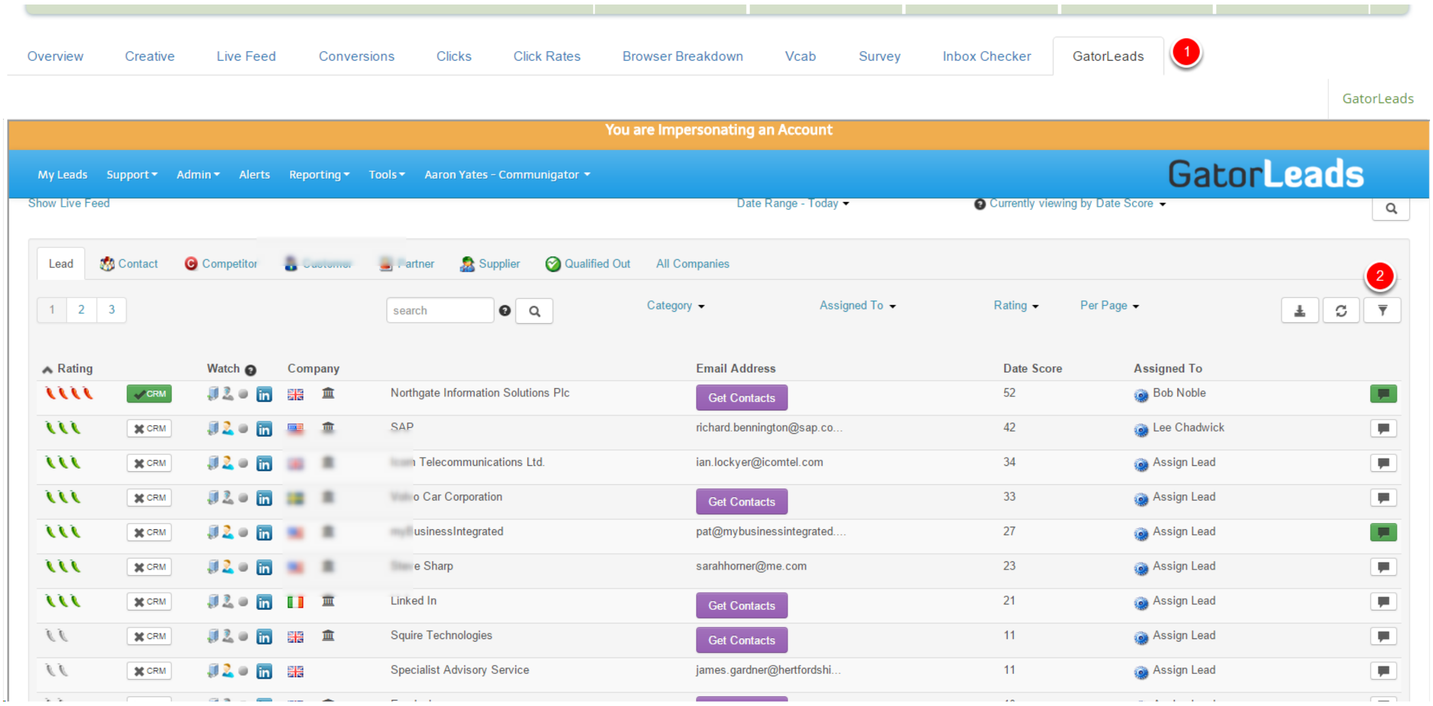
A window will then pop up with the URL. Copy to share this with any interested parties.

GatorLeads - Campaign Results

GatorLeads is CommuniGator’s website tracking software which allows you to track who is on your website and what content they are looking at in real time.

Within the campaign results screen, you have the ability to access your GatorLeads account directly.

GatorLeads within Campaign Results



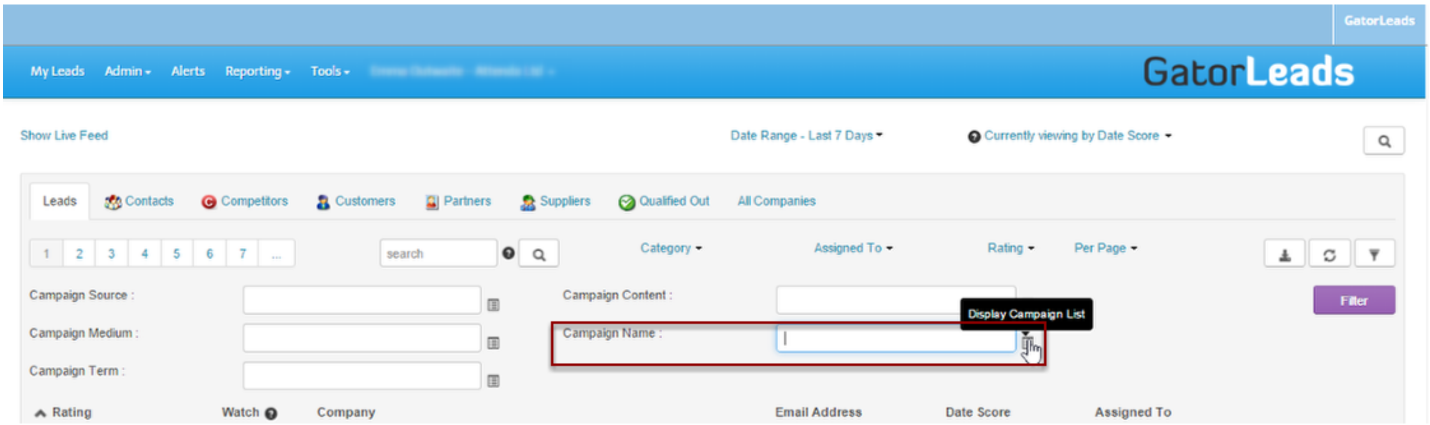
1. To access the screen above, you will need to click the 'GatorLeads' tab within the campaigns results area.

This shows all leads that have been generated by cross referencing your website traffic with CommuniGator's IP address database.

You can also filter your results within GatorLeads to search for Leads that have been generated from your campaign within CommuniGator.

2. To do this, you will need to filter your results by searching for the campaign name in the campaign name field.

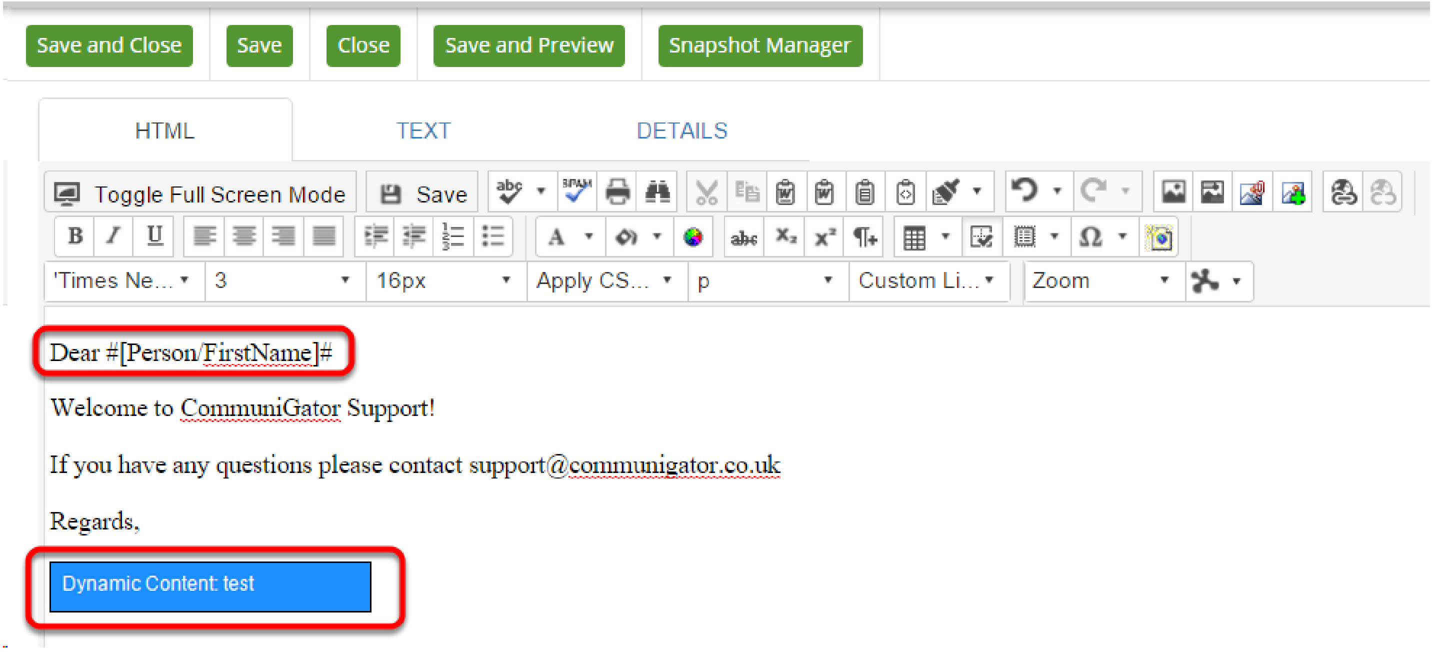
Search by Campaign



How to... Campaign Questions

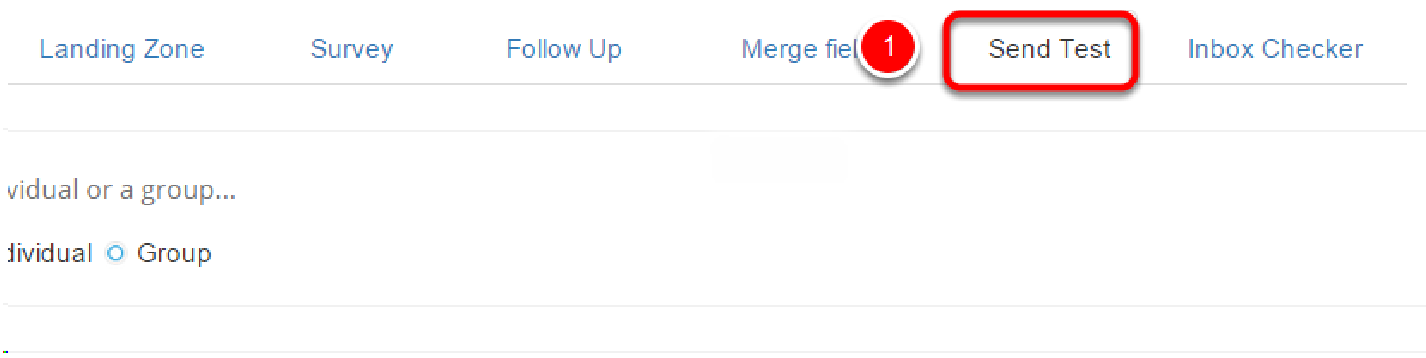
How to Test Dynamic Content and Merge Data

The Email



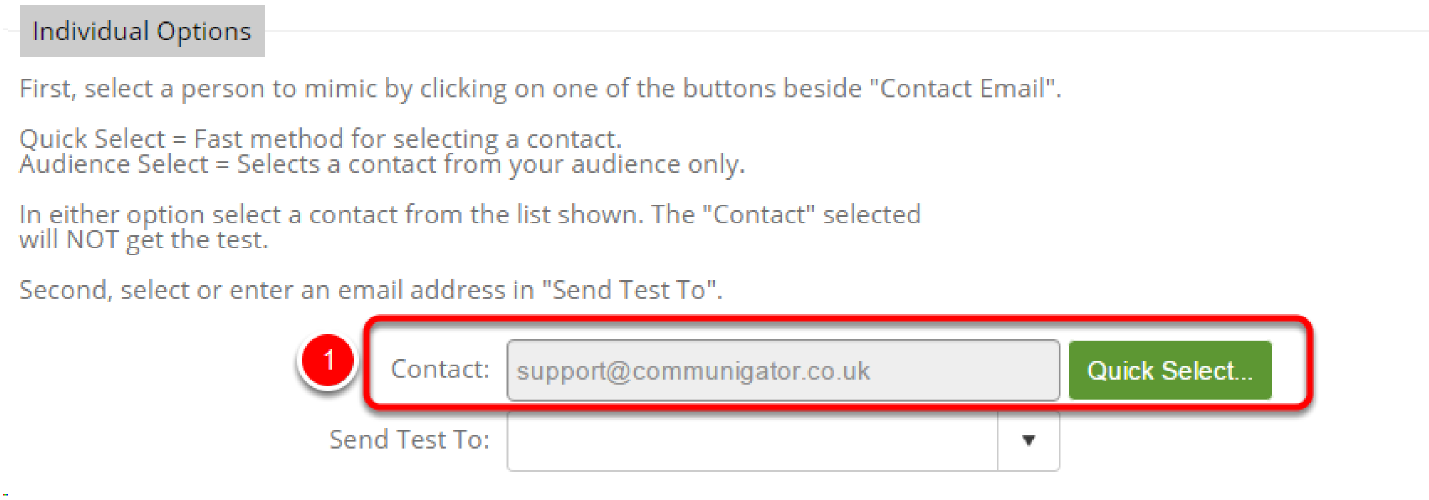
Add your merge data and Dynamic Content.

Sending The Test



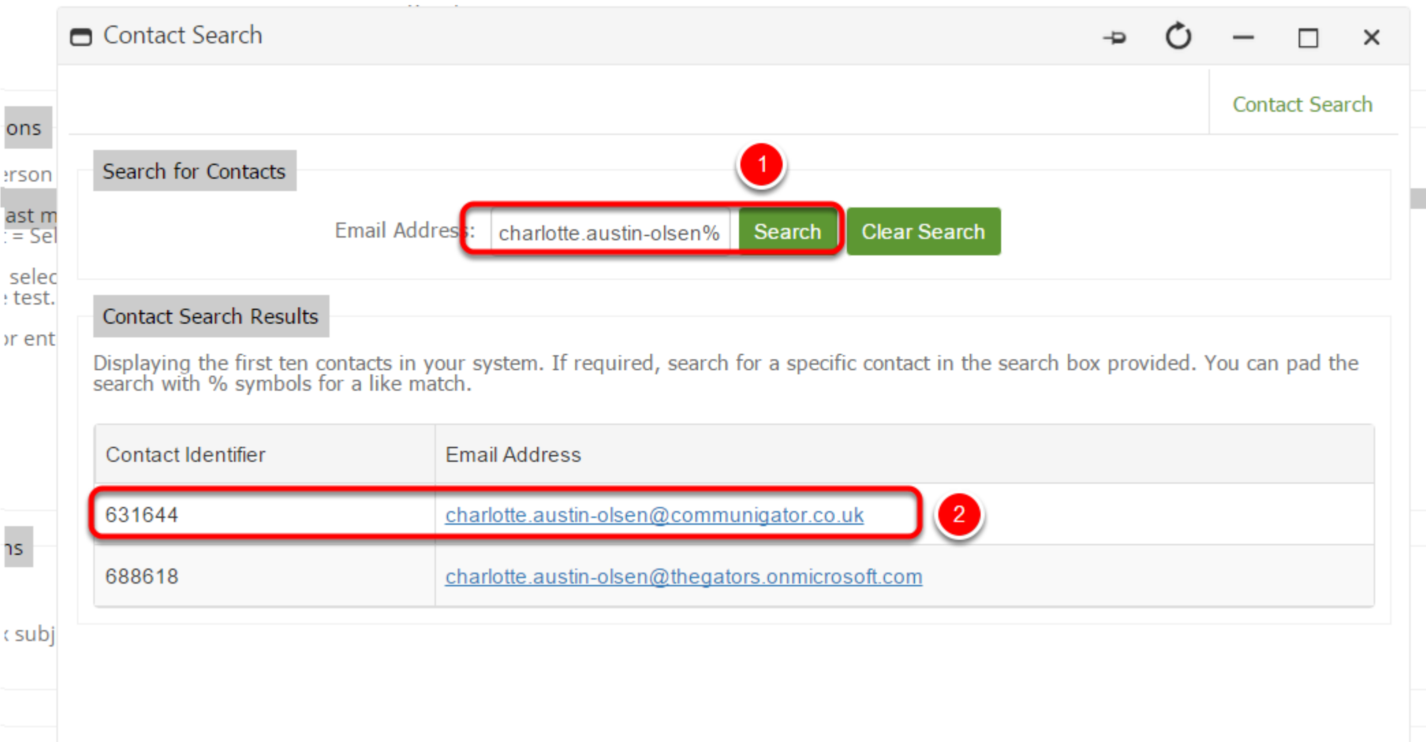
1. Within your Campaign, go to the 'Send Test' tab.

Sending The Test



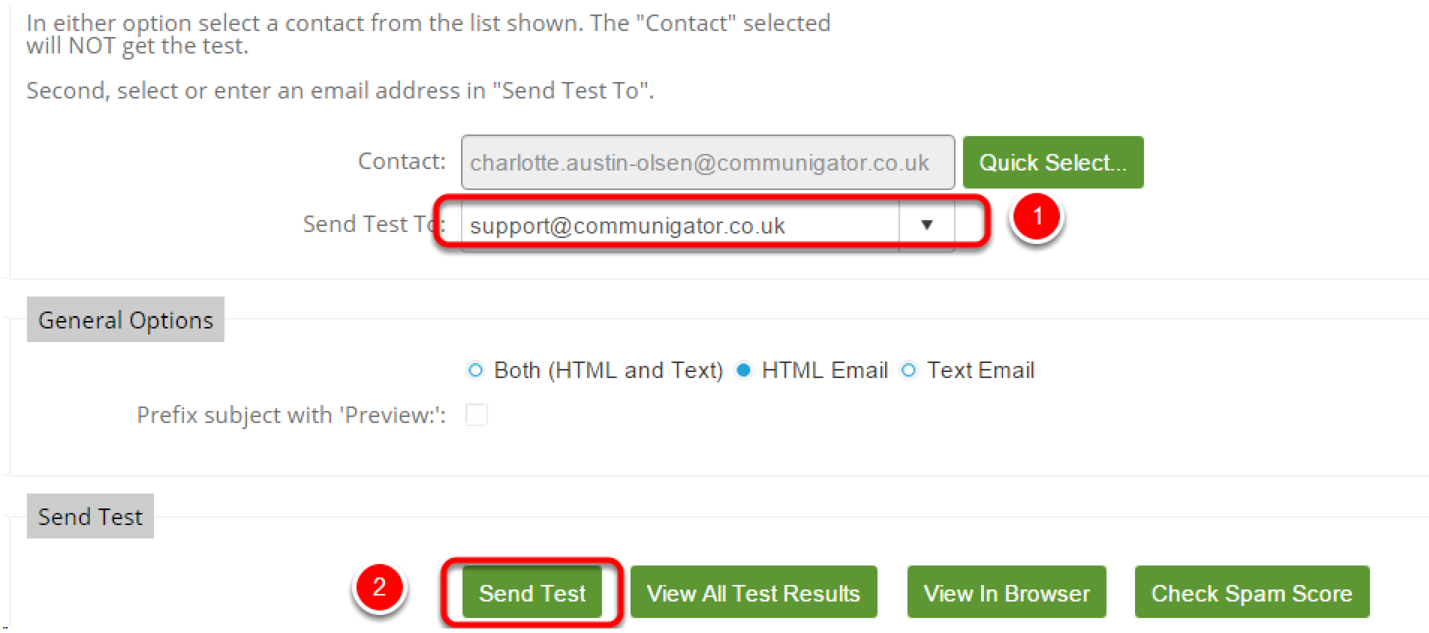
1. Change the contact your test will be imitating to a contact with the correct DATA in their record

Selecting the Contact



1. Search the Contact
2. Select the Contact

Send

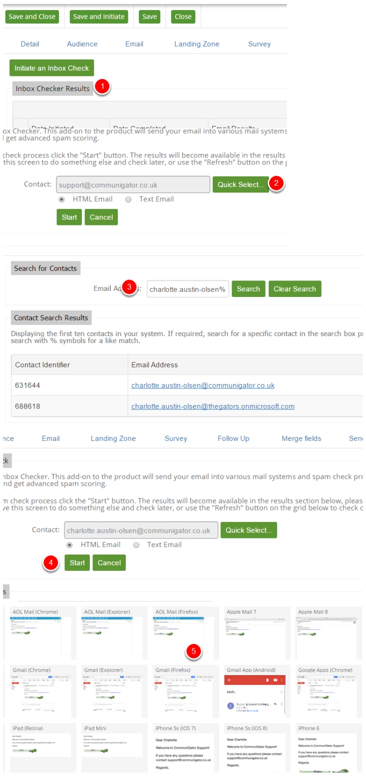


1. Enter the email address you want to send the test to
2. Send Test

End Result

From this test you can see that the dynamic content is working.

Do dynamic elements work when you use Inbox Checker to see how your email works across different email clients?



Answer yes. The version of the email sent by the Inbox Checker is determined by the contact you choose before the Checker is started.

So running an inbox check will show how the recipient will receive the email.

1. In the Inbox Checker, click on "Initiate an Inbox Check"
2. Click on "Quick Select..."
3. Select the contact to view in the test
4. Click Start
5. Once the results are generated click on one of the examples and you will be able to see the email.

How to use Sender Email Address Dynamic

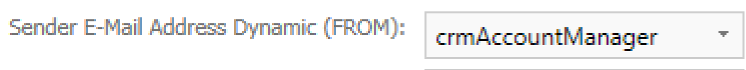
Sender Email address Dynamic allows you to populate the sender address with a contact field.

However the sender address that is populated in this section must match the domain of your Sender address.

Sender Email Address

You may have one or more Sender Domains associated to your account, in this example the sender domain is @guru.vcab.com. This is a sub domain of @vcab.com.

Sender Email Address Dynamic



The drop down next to Sender Address Dynamic allows you to select a field against the contact record to use as the sender email address.

This example uses a field called crmAccountManager.

So when the Email is sent the Contacts Account Managers Email address will be populated in the Sender address. However the data that is held in this field is not account.manager@vcab.com which is the Account Managers true email address. This is because @vcab.com is not set up for use with CommuniGator. The data has account.manager@guru.vcab.com as this is the email address that is authorised to be used with CommuniGator.

If you where to populate account.manager@vcab.com into the sender address the emails will fail to send from the system.

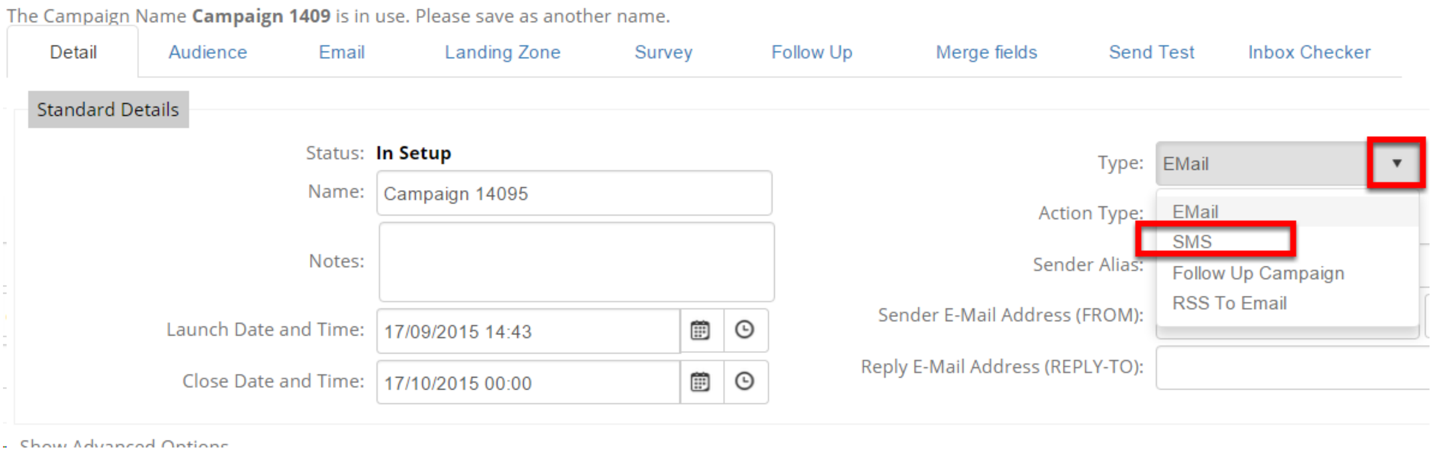
How to Create An SMS Campaign

The capability to send SMS campaigns will need to be discussed with your Account Manager and then set up for your use.

Once your account has been configured to send SMS campaigns then you can go about building your first SMS campaign.

Create a new campaign as you would normally.

Creating an SMS Campaign - Changing the Campaign Type



Once you have added a new campaign your will need to convert it to an SMS campaign by select SMS in the type drop down.

This will then remove a number of tabs from along the top.

Your audience will need to have been uploaded with a mobile number against them, in order for you to be able to send them an SMS.

The audience can be counted as you would normally.

Creating an SMS Campaign - Attaching the SMS

1. Click on the SMS tab at the top of the screen.
2. Enter an Alias for the SMS.
3. Enter the SMS message.
4. Click attach SMS.

You can send a test SMS by going to the send test tab, the person you wish to send the test to needs to be in your Communigator database and have a mobile number in the mobile field.

Once you are ready to initiate your SMS campaign, this can be done in the same way as normal.

It is only possible to report the number of SMS' that have been sent, it is not possible to show if they have been opened and of course there will be no click throughs.

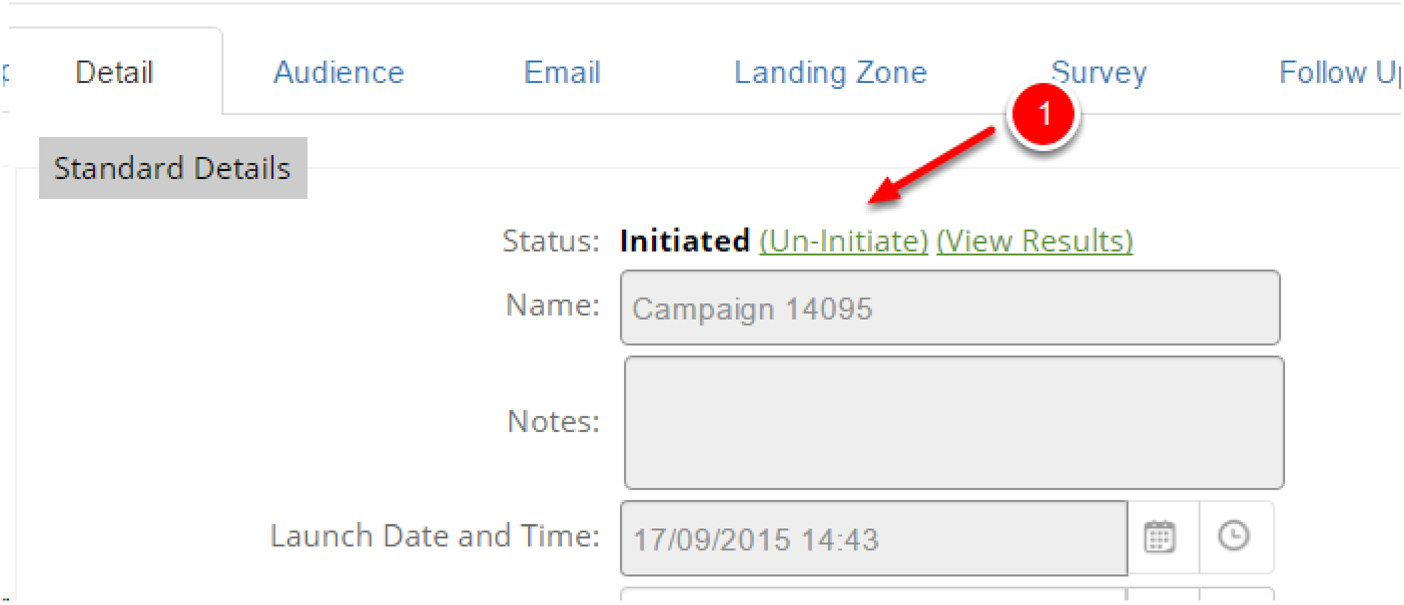
How to Uninitiate a Campaign

You are able to un-initiate a Campaign, this can be done on the Detail tab within a Campaign. There is one condition however which is very important...

You are only allowed to un-initiate a campaign if it has not started sending.

You may want to do this because a mistake has been found and you need to change it. If you do this fast enough then you are in luck. Customers who initiate Campaigns for the future will benefit from this the most. The time window will be longer before it starts sending.

Uninitiating a Campaign

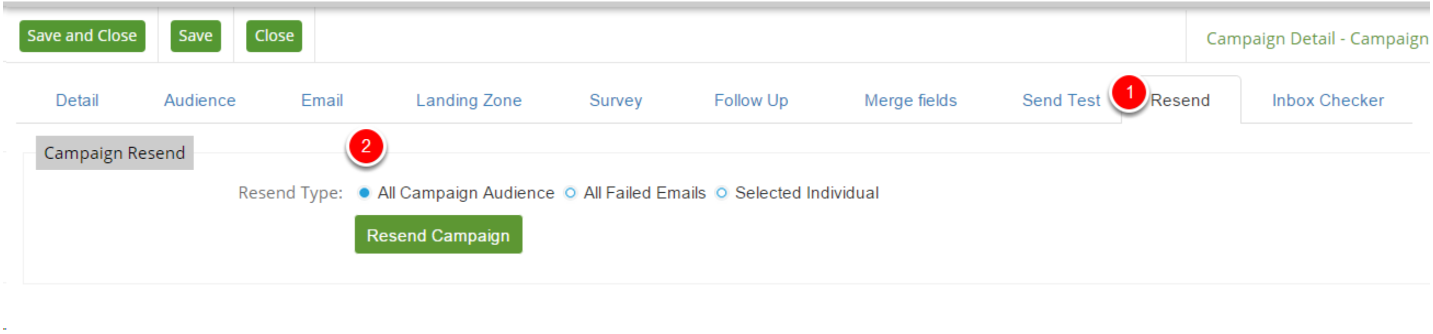


1. Clicking uninitiate will refresh the screen and the campaign will then be uninitiated and the Status will be In Setup.

How to Resend a Campaign

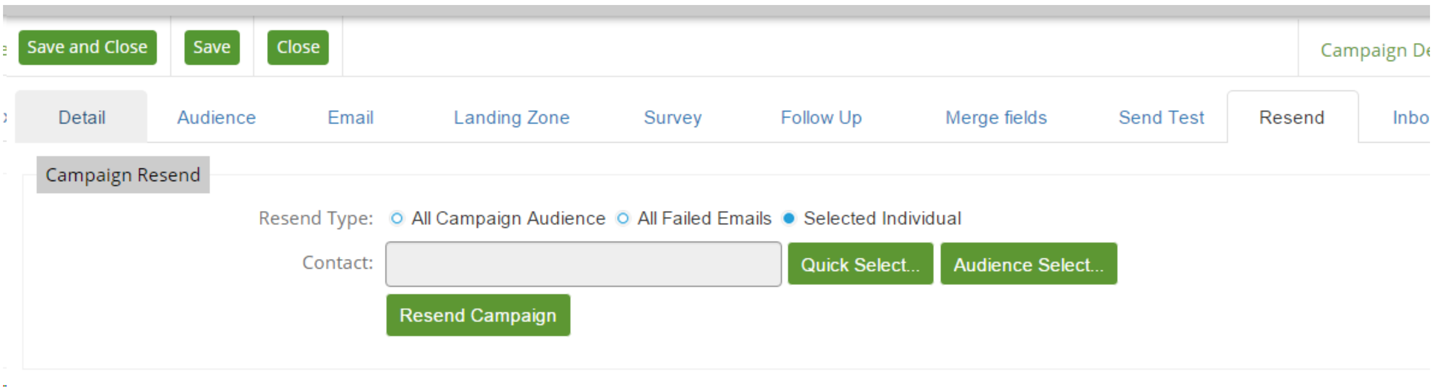
Once a Campaign has been initiated you may wish to resend the campaign to the whole audience or to a selected individual. This can be done on the Resend tab within the campaign.

Resending a Campaign



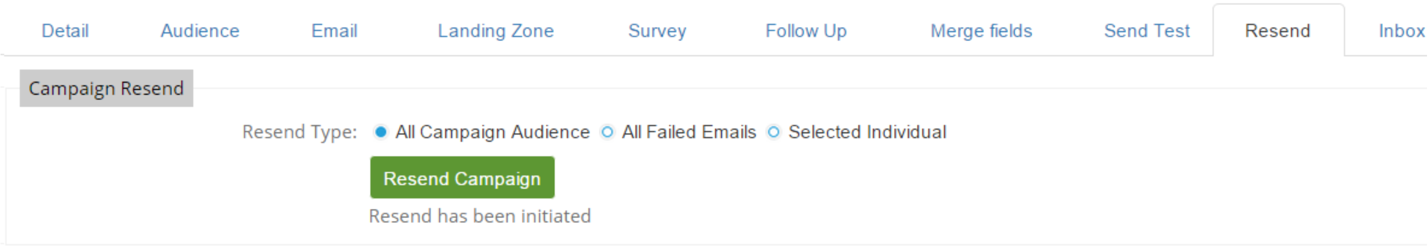
1. Click the resend tab.
2. Select an option from the three resend types.

Resending to a Selected Individual



If you are resending to a selected individual then a box will appear with the options to select a contact via quick select (this will open a pop up for you to pick a contact from the whole database) or Audience select (which will open a pop up that allows you to select a contact from the campaign audience). The contact box on this screen does not allow you to type and address into as the contact must be an existing contact in the database.

Resending a Campaign



Once you are ready hit the resend button and the rend will be initiated.

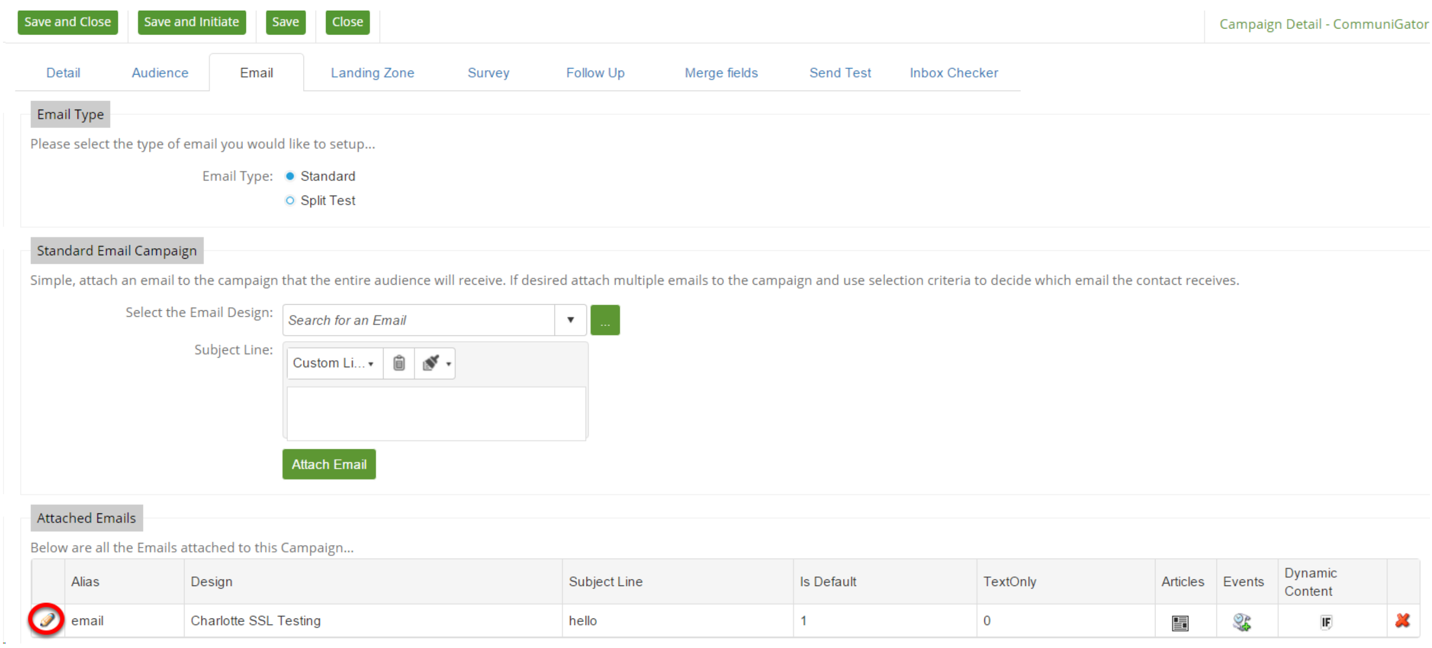
How to use Selection Criteria

Within the Campaign tabs it is possible to use Selection Criteria for a number of things.

For example you may wish to have three Emails attached to your Campaign, a Red one, a Blue one and a Green one. If you know the contacts favorite colour and you have that stored in a field against the contact record. Then you can ensure that they get the Email in their favorite colour.

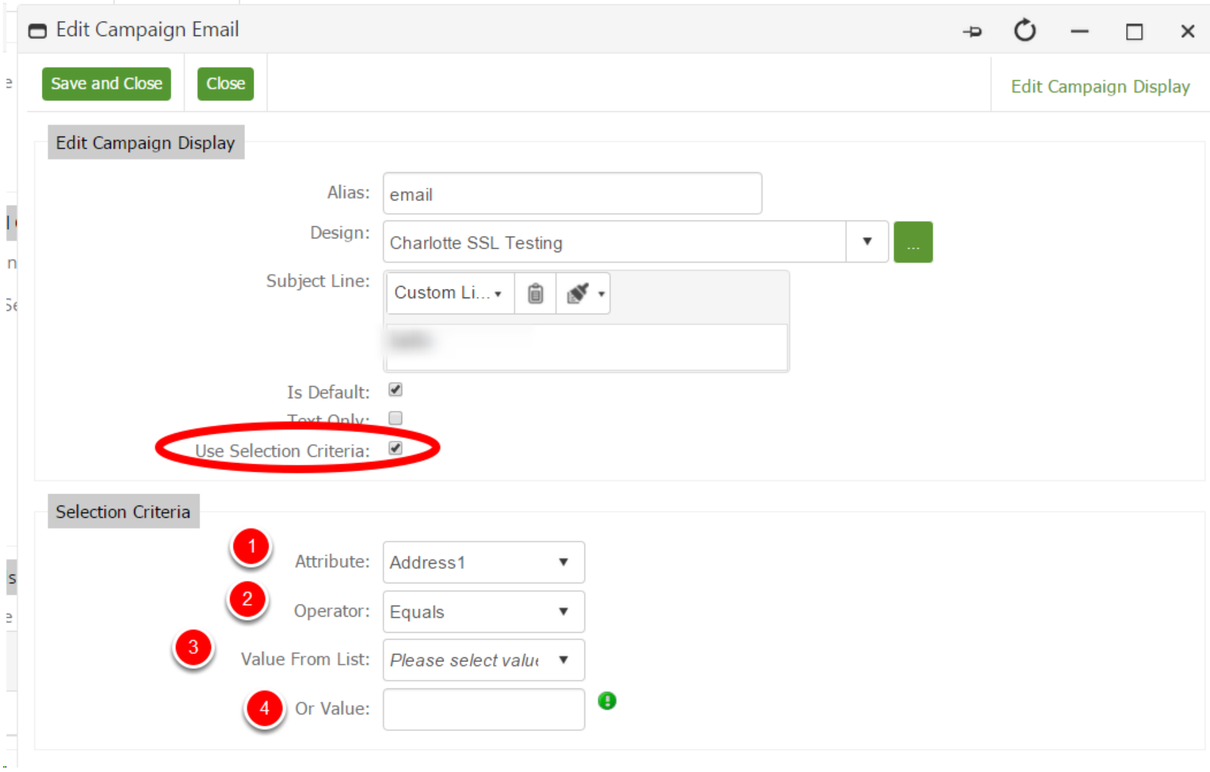
This same idea can be used for Landing Zones and Surveys too, it works the same for each tab that you are on. The only thing to bear in mind is if you are attaching multiple Landing Zones or Surveys the Reference numbers need to be the same so you would have three Reference number ones if you were going for their favorite colour.

How to use Selection Criteria



Click on the pencil next to the attached Email/Landing Zone/Survey.

Selecting a Criteria



Tick the box to use Selection Criteria, this will display the Selection Criteria options.

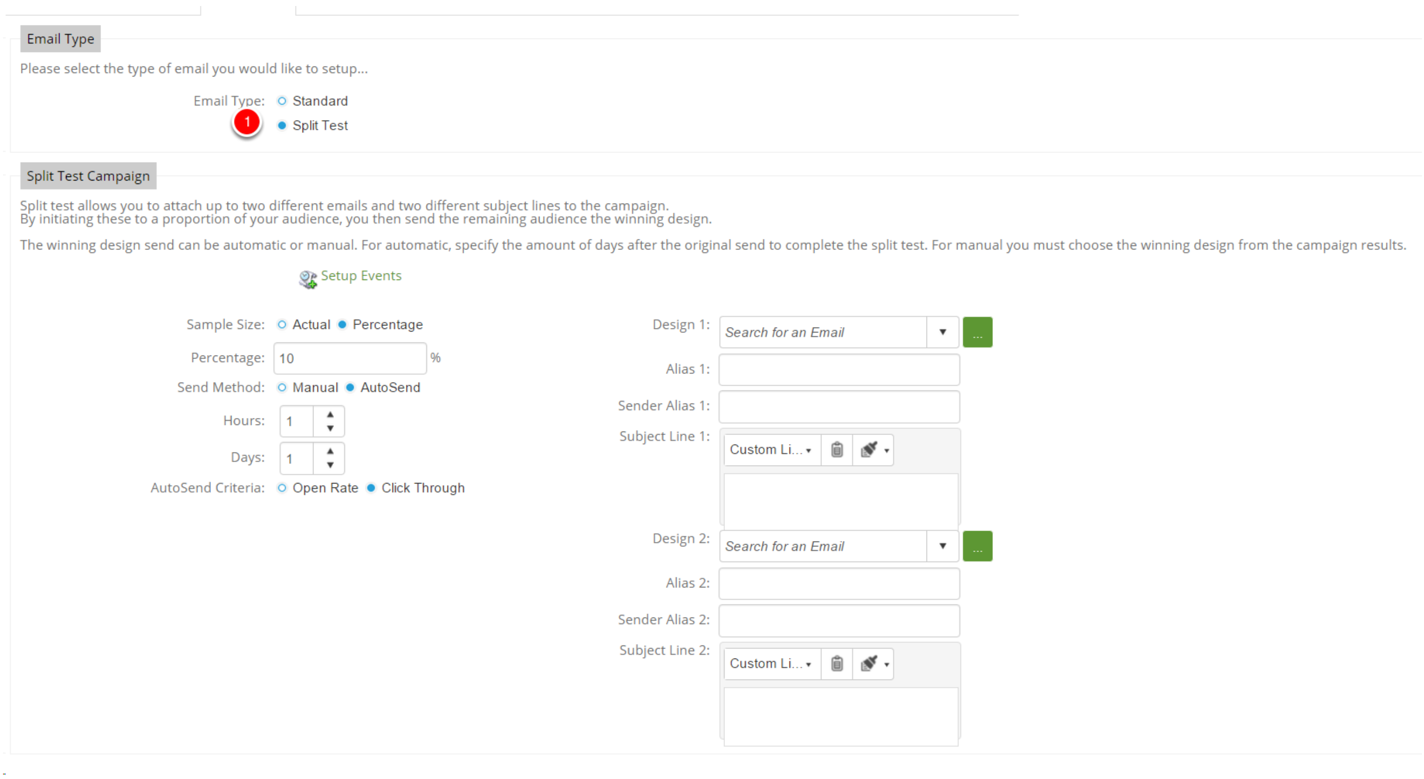
1. Select the Attribute you want the system to look at E.G Favorite Colour Field.
2. Select the Operator to use.
3. Pick a value from the list.
4. Or manually type in a criteria.

You may wish to select one of the Emails/Landing Zones/Surveys to be Is Default so if as contact doesn't fulfill the criteria they will get the Default.

How to Set up a Split Test

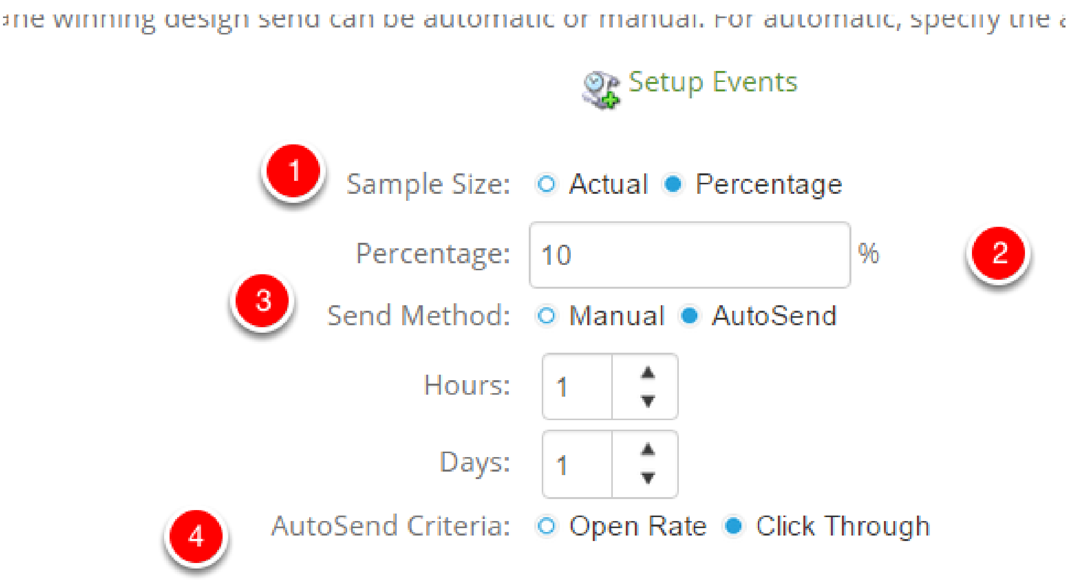
Within the product you can split test two different Designs, Alias' or Subject Lines.

Creating a Split Test



1. Select Split Test from the Email Tab within the Campaign you would like to be a split test.

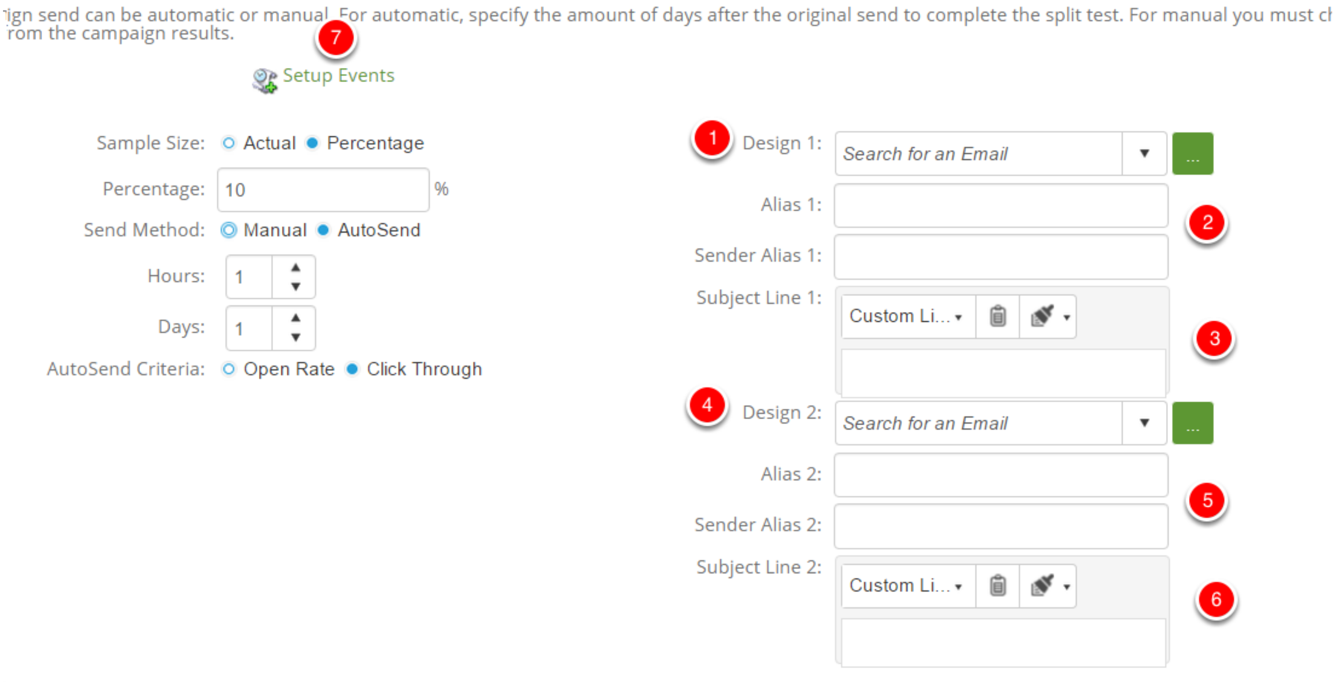
Split test rules



This section will explain the different rules you can set for split tests.

1. Sample size- Select if you would like your sample size to be a Actual number or a percentage of your audience. Please note you are not able to select the contacts that will particpate in the split test it will be decided randomly from the group attached to the campaign. If you would like to search by percentage which is what the example is currently show you select this option
2. Percentage- This will change depending on what sample size metric you have decided to use, this example will show the percentage. If you have select actual the text next to the single line text box will change and will allow you to enter the number of contacts that you would like to send to.
3. Send method- If you would like to select the winning design manually, which can be done through the view results option on the campaign screen select manual. If you would like to it to be automatically select auto send. If you select the AutoSend option you will be able to set the hours and days when you would like the split test to be over.
4. Select if you would like the remainder of the split test to go automatically or manually. If you choose AutoSend then you must enter a time frame and a criteria you would like the system to select the winner based upon. If you choose manual then a user has to initiate the remainder of the split test whenever they are ready.

Selecting the design



1. Design 1- Select the creative email that you would like to use for this send
2. Alias 1 - This is the Tab ID, which is text that shows on the web browser when the 'view online' link is clicked.
3. Sender Alias 1- Enter the sender alias that you would like to use, please note if a sender alias has not been entered the campaign will show the email address rather than the name (e.g. amy.johnson@communigator.co.uk instead of Amy Johnson)
4. Subject line 1- Enter the subject line that you would like to use for the first email
5. Design 2- Select the second design that you would like to use for the split test, the design does not have to change and you can use the same design as design 1.
6. Alias 2 - Tab ID for when the 'view online' link is clicked.
7. Sender Alias 2- Enter the sender alias that you would like to use for the second email.
8. Subject line 2- Enter the subject line that you would like to use for the second article.
9. Setup Events- If you have event blocks included in the design you can select the events that you would like to include in the send by clicking on the setup events button.

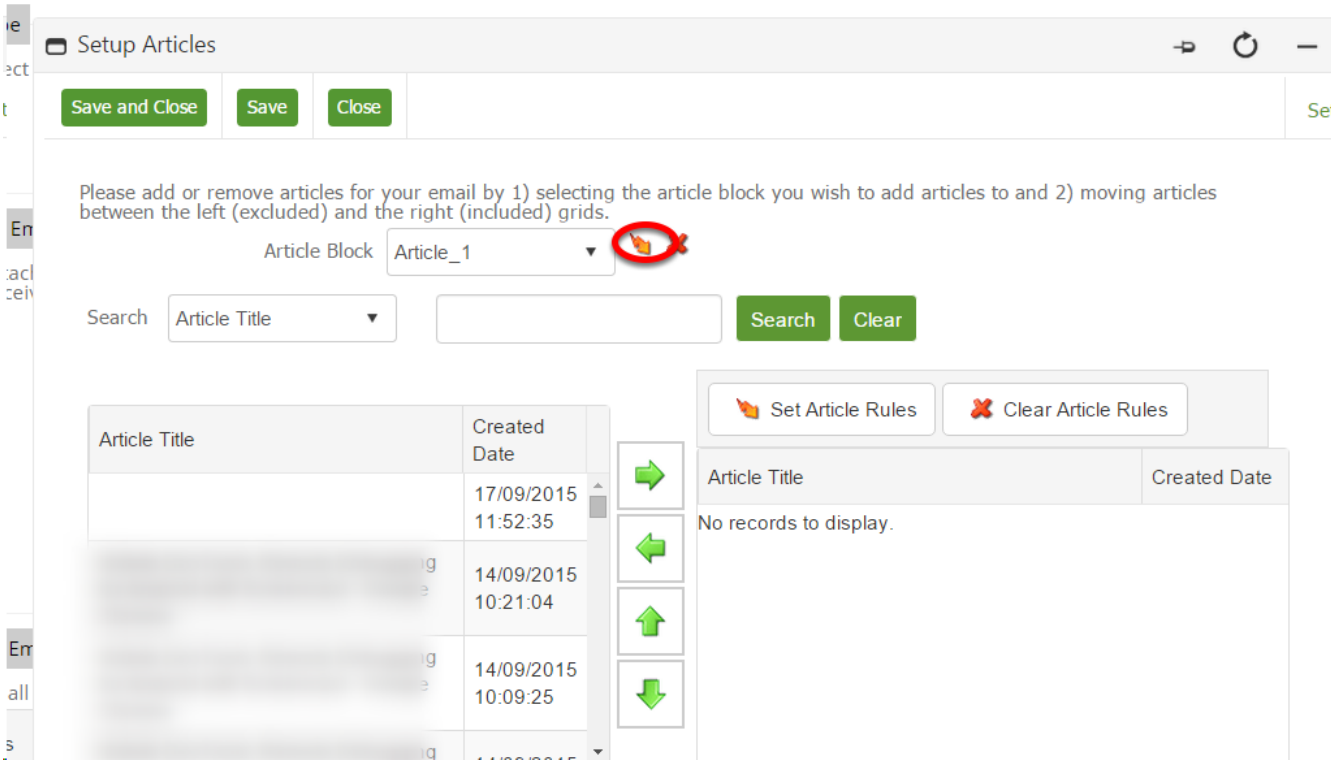
Dynamic Articles and Article Blocks

This help article will walk you through how to include dynamic articles, meaning you can apply rules which will send the recipient the article that meets the criteria. This feature works similar to dynamic content blocks.

Attaching the articles to the campaign

Once you have attached the email to the campaign you are able to select the articles that you wish to use for the campaign. Simply click on the Articles section that is highlighted above. You can only attach articles to the campaign if an article block is included in the creative email.

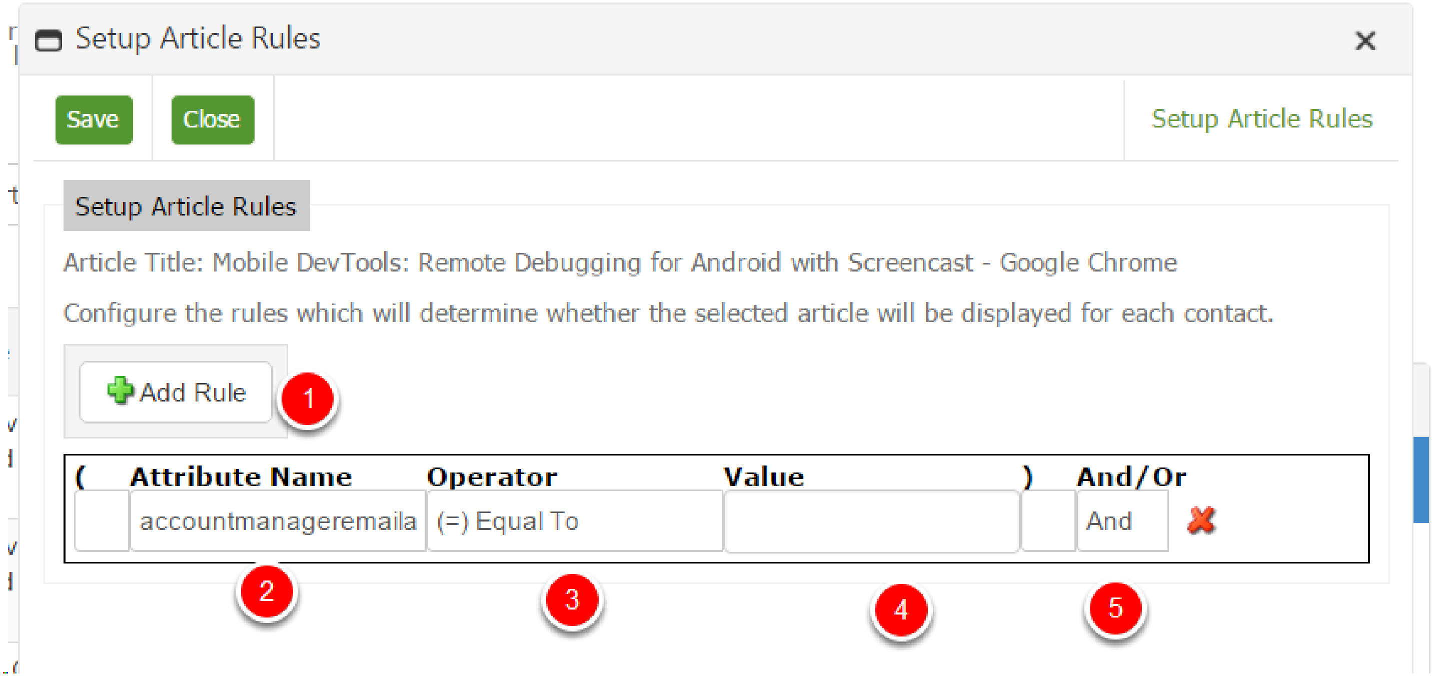
Rules to the selected Article Block



If you would like to set certain rules to the article block you can do this by clicking the button that is highlighted in the above picture. This tends to be used if the article block styles changes depending on the criteria set for the recipient

Please note if you are setting rules based on article blocks it could lead to gaps in your email if they do not meet the article block rules.

Setting up article rules for the article block

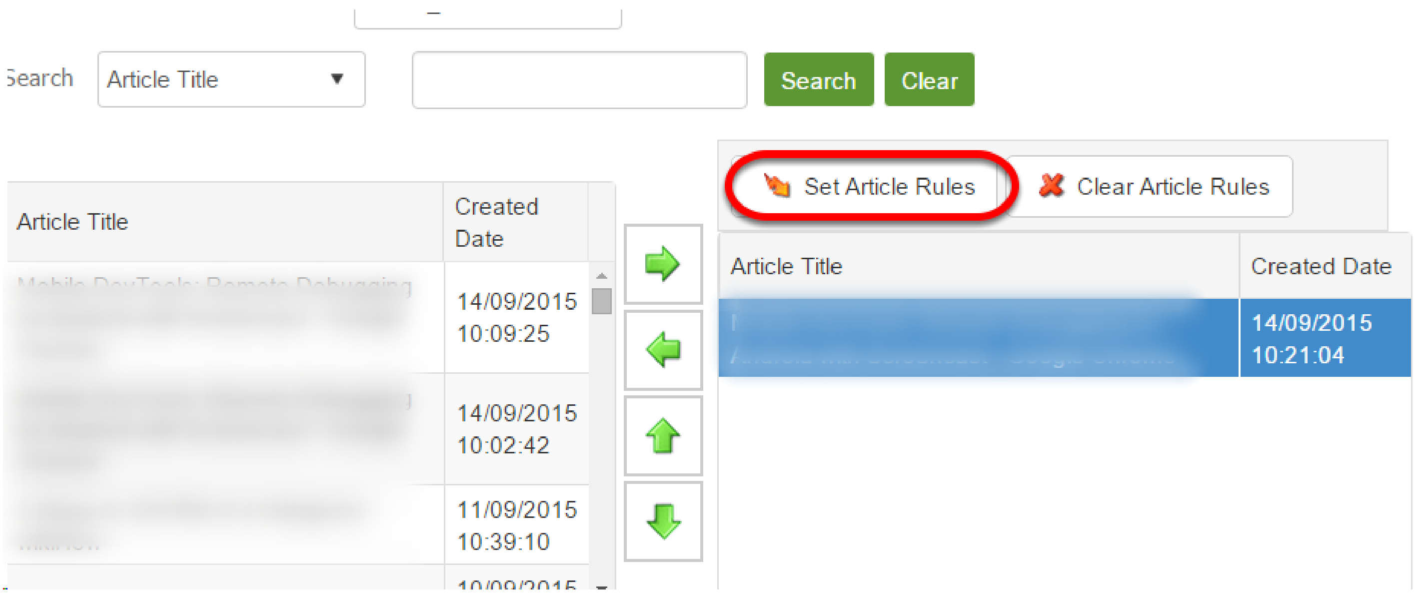


You will be then taken through to the section where you create the rules for the article block.

1. Add rule- Click add rule, this will then expand the section and will enable you to select the rules that you would like to use.
2. Attribute name- The attribute name is the business object that you would like to use to segment your audience by. To select the attribute, click on the attribute name field which will provide a list to choose from.
3. Operator- If you click on the drop down below operator you will be able to select the metric that you measure this by i.e. is like, equal to.
4. Value- Enter the value that you would like to apply the criteria for.
5. And/Or- If you would like them to meet multiple rules click the And rule if they only need to meet one of the criteria select OR.

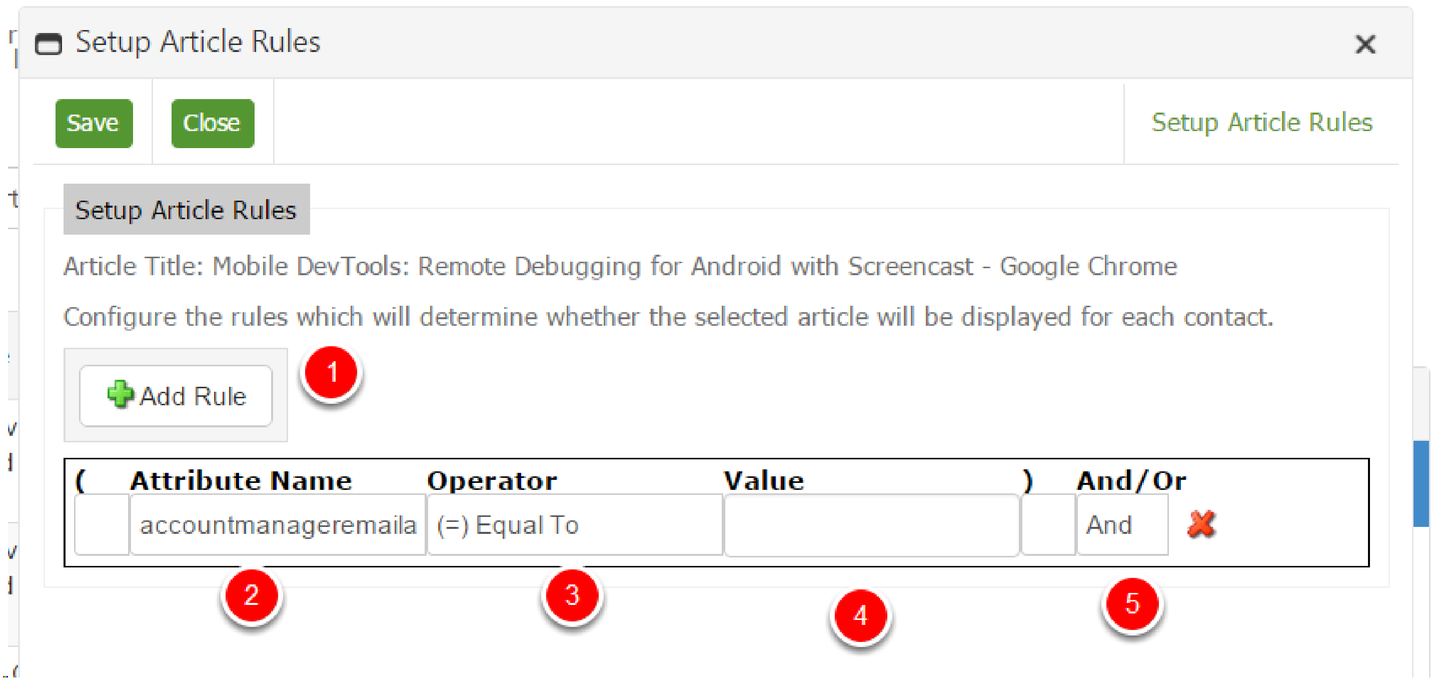
If you would like to add additional rules click add rule and this will place the rule below the rule you have just created. Once you are happy with the rule click save, then click close and you would have successfully created a dynamic article block rule.

Setting Rules for Articles



If you would like to set article rules you will need to ensure that you have the articles in the right hand column. You can do this by clicking on the article that you wish to use and select the right arrow that appears in the middle which will allow you to move the article from the left hand column to the right. Once you are happy with the articles, select the article that you wish to add a rule to and then click on the set Article rules (highlighted in the screenshot above).

Setting Article Rules



You will be then taken through to the section where you create the rules for the article.

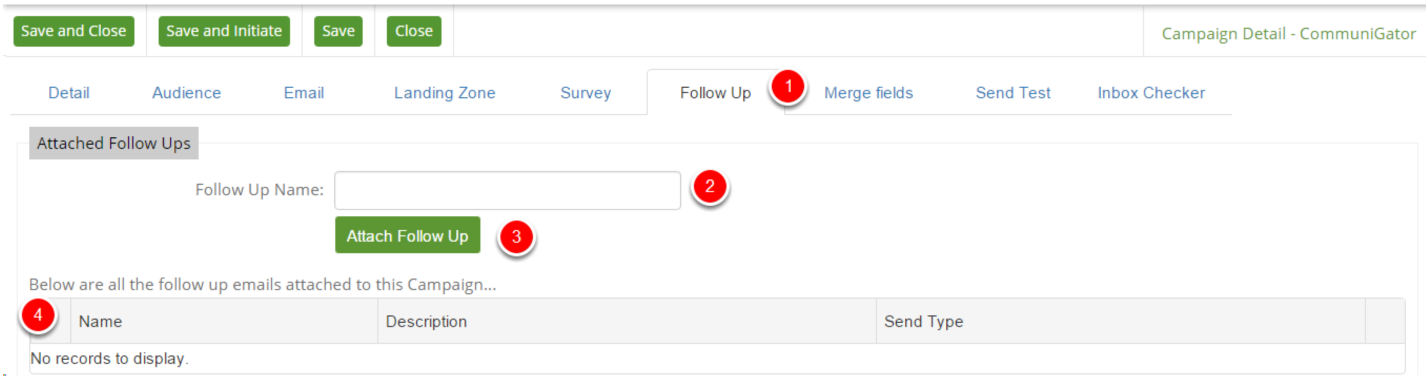
1. Add rule- Click add rule, this will then expand the section and will enable you to select the rules that you would like to use.
2. Attribute name- The attribute name is the field that you would like to use to segment your audience by. To select the attribute click on the attribute name field which will provide a list to choose from.
3. Operator- If you click on the drop down below operator you will be able to select the metric that you measure this by i.e. is like, equal to.
4. Value- Enter the value that you would like to apply the criteria for.
5. And/Or- If you would like them to meet multiple rules click the And rule if they only need to meet one of the criteria select OR.

If you would like to add additional rules click add rule and this will place the rule below the rule you have just created. Once you are happy with the rule click save, then click close and you would have successfully created a dynamic article block rule.

How to Create a Follow Up

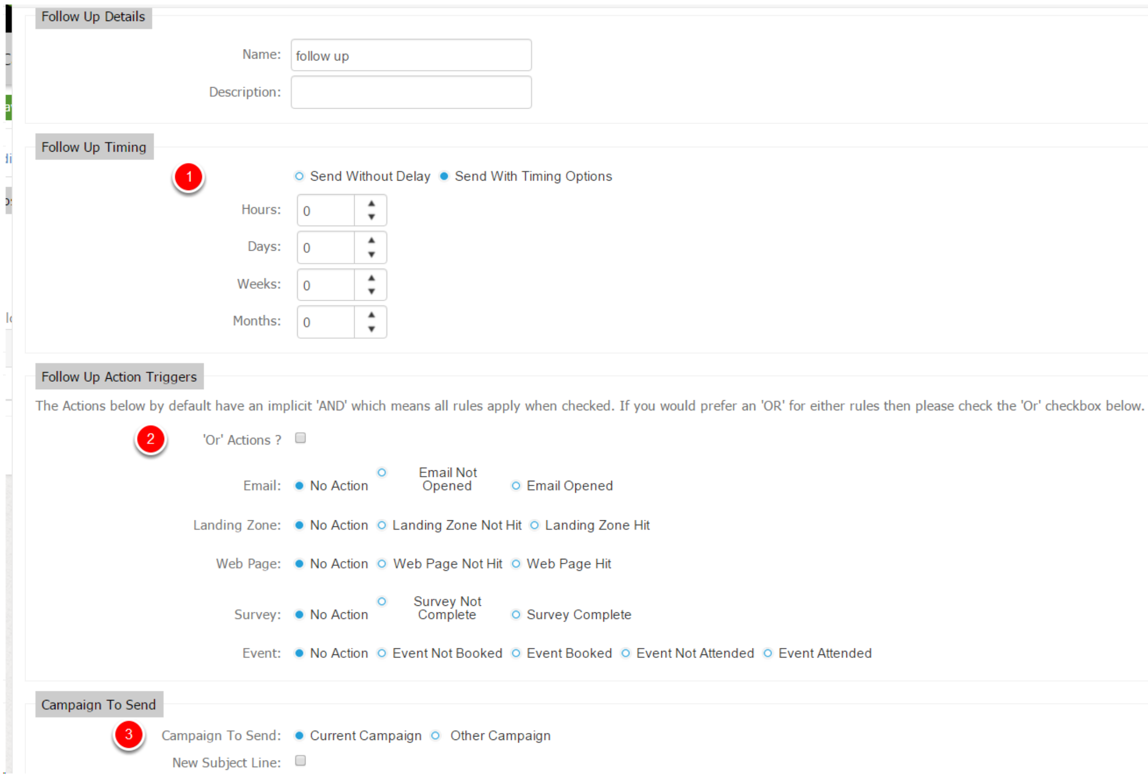
It is possible to schedule a follow up email to be sent from the system automatically. The follow up is usually set up at the same time as the campaign.

Attaching a Follow Up



1. Click on the Follow Up tab within the campaign.
2. Give the Follow Up a name.
3. Hit Attach Follow Up.
4. Once the Follow up has been attached click on the pencil icon to bring up the details.

Selecting a Follow Up Criteria



1. Choose the timings you would like to have-

- Send without delay can only be used when an action is carried out not when an action is not carried out.
- Selecting a timing will schedule the follow up to go out x amount of time after the email has been sent if the action is not carried out or x amount of time after the action occurs if the action is carried out.

2. Select the Action Options - No action ignores the rule all together so if all options are set to no action, no follow up will be sent. By default the rules work on an AND basis however you can tick to use OR.

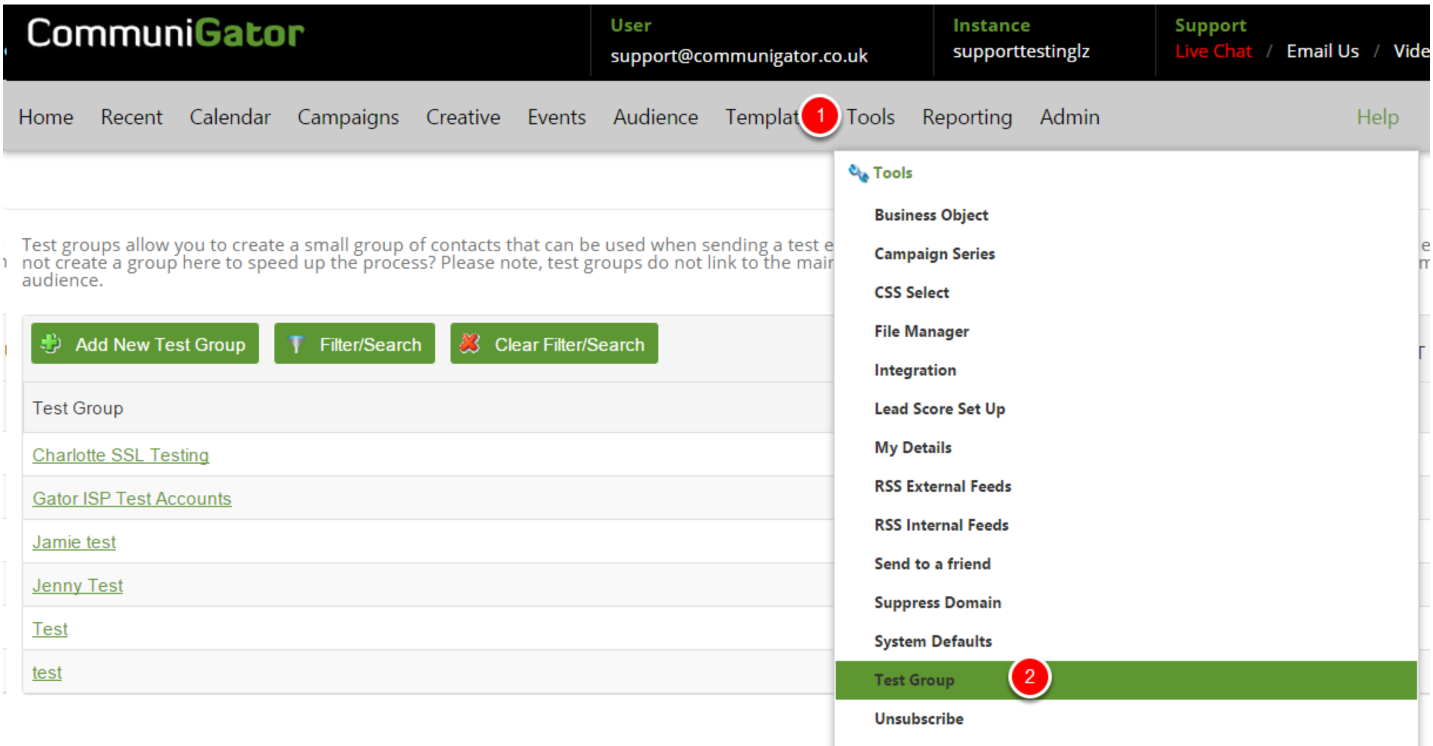
Example: If you wish to send a follow up to the contacts that have not opened then you would select Email not opened and leave the rest to No Action.

3. You can either send the same campaign again (with or without a new subject line) or you can send a different campaign. If you are sending a different campaign then the different campaign must be set up as a follow up and be initiated.

How to Create a Test Group

If you send tests to multiple email addresses within your organisation it is worth while creating a test group of these email addresses so that you can send one test rather than lots of individual ones.

Creating a Test Group



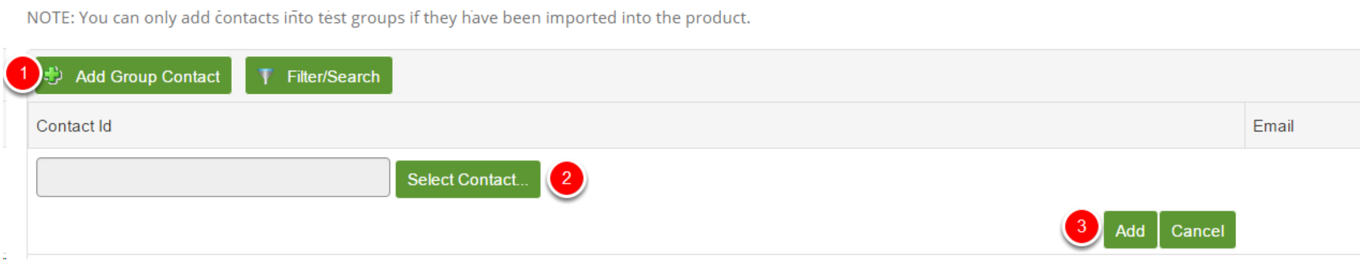
1. Click Tools on the top tool bar.
2. Select Test Group from the drop down.

Adding a New Test Group

1. Click Add New Test Group
2. Give the Group a Name

3. Click Add, the screen will refresh and you will be taken to the test group.

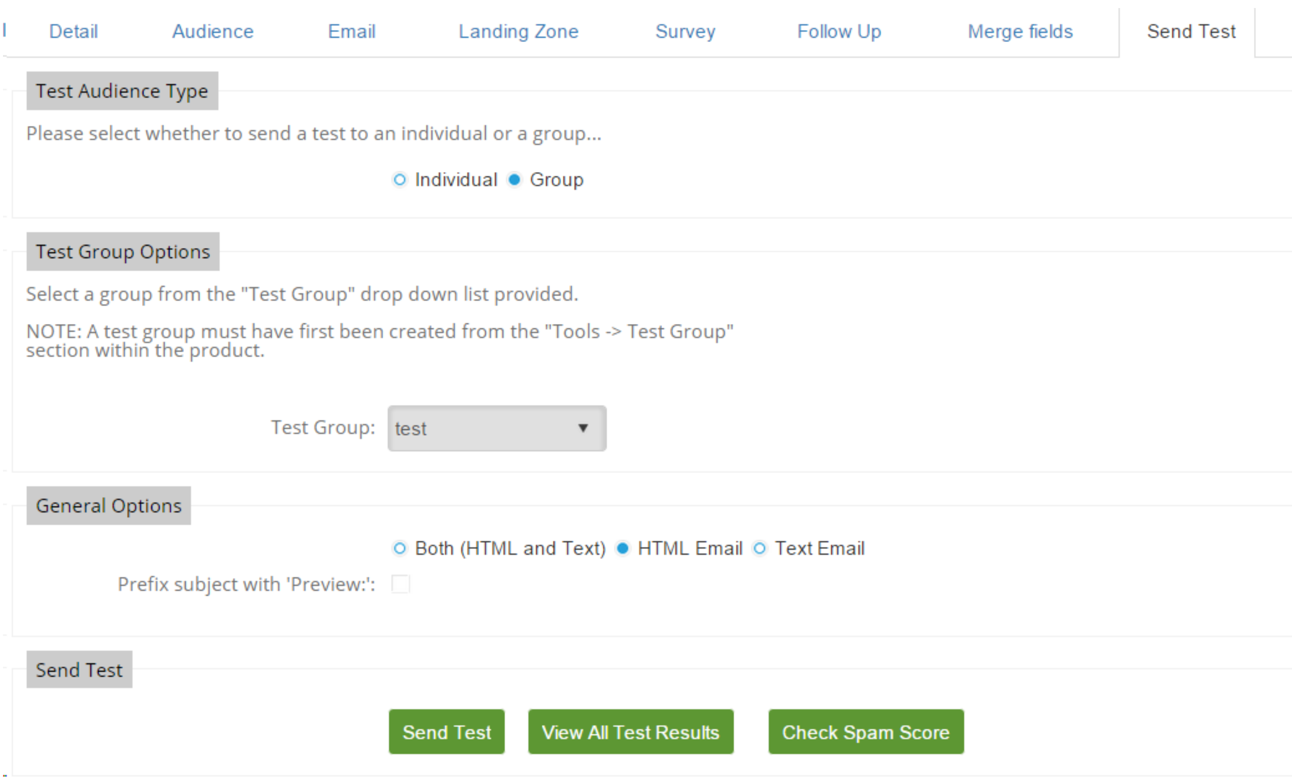
Selecting a Contact to add to the Test Group



1. Click Add Group Contact
2. Click Select Contact (because the contact must be in the database already you cannot type the address into the box you must select them from the database) this will bring up a box for you to search for the email address from your database.
3. Once you have selected the contact click Add.

Repeat steps 1-3 until you have added all the members that you need, then hit save and close at the top.

Sending to a Test Group

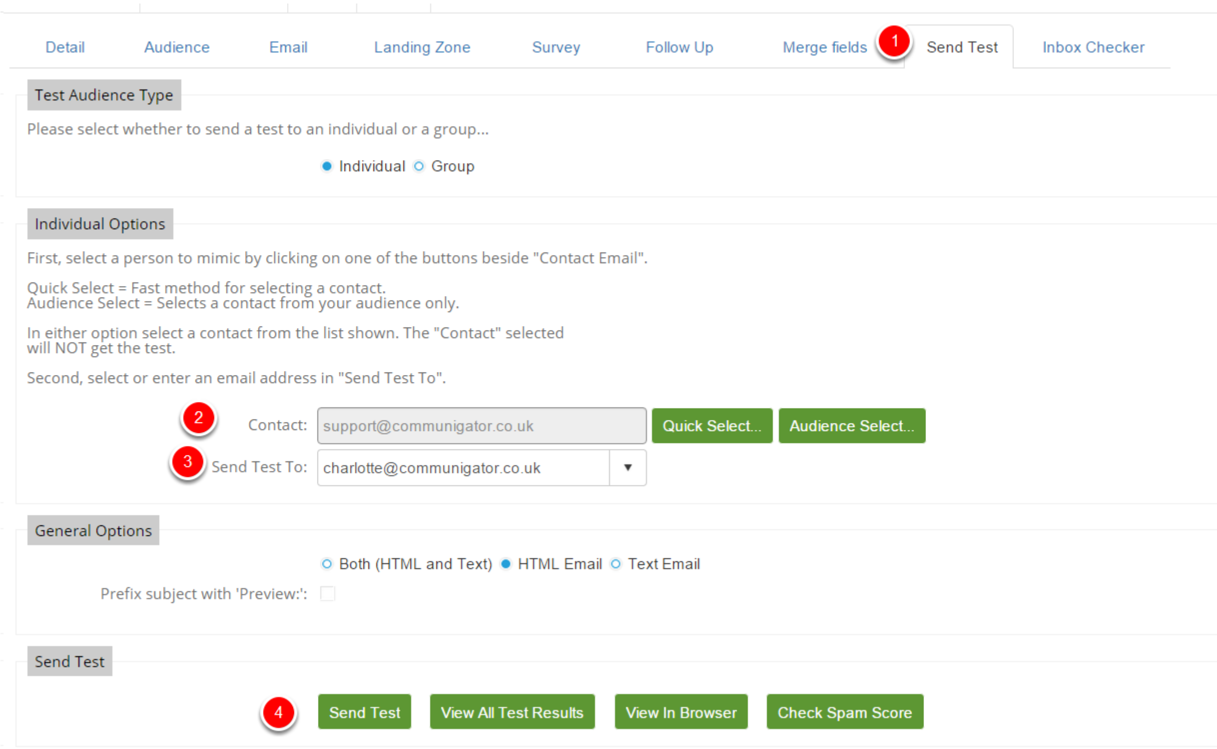


Sending to a test group is virtually the same as sending to an individual. When on the Send test tab select Group instead of individual and then choose a group from the drop down. The Test email won't mimic a contact from the database like and individual test does so any personalisation on the email will be relevant to the test recipient.

How to Send a Test

You should always send a test of your campaign to yourself to ensure that it looks pretty and the links work correctly.

Sending a Test Email

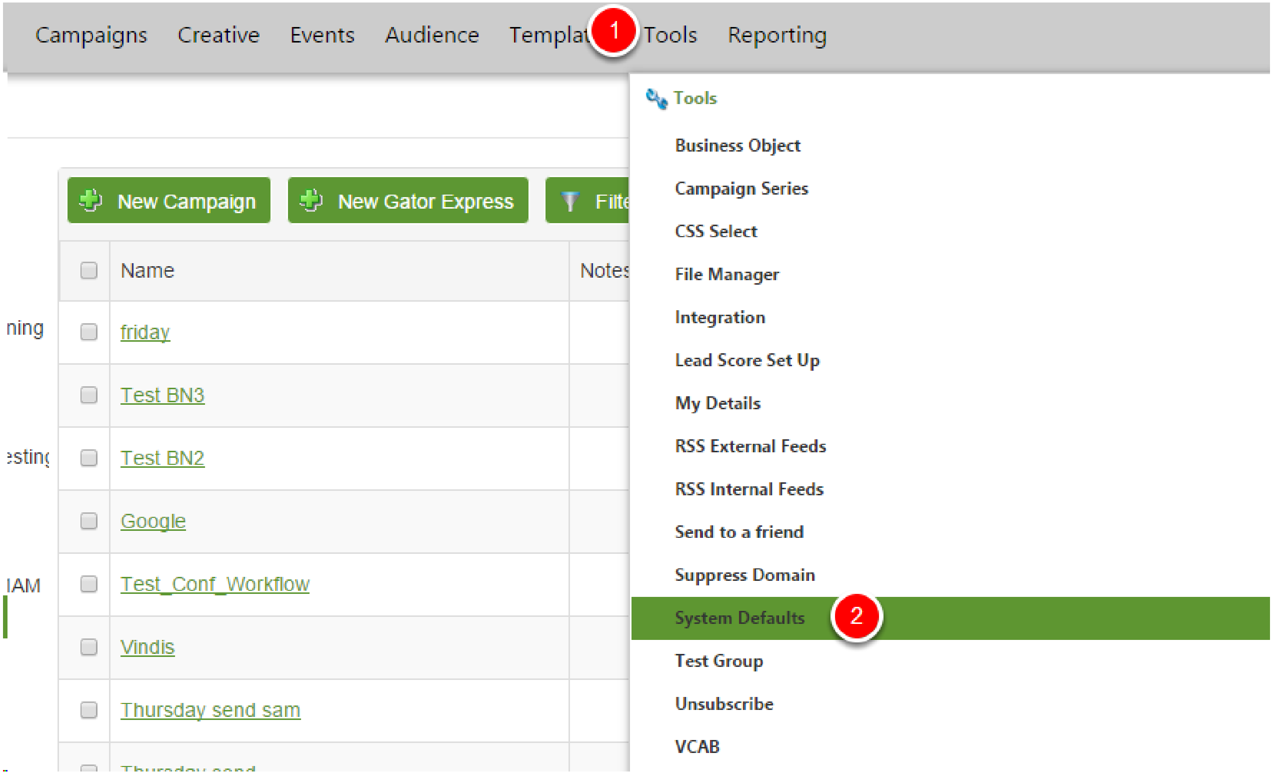


1. Once inside your Campaign click the Send Test tab along the top.
2. Choose a contact to mimic (this contact won't receive the email but any personalisation in the email will be relevant to them) you cannot type in this box so use Quick select (to choose from the database) or Audience Select (to choose from the audience).
3. Type in the Email address that you would like the test to be sent to.
4. Click Send test, red text will appear confirming that your test has been sent.

How to Add a Campaign Seed List

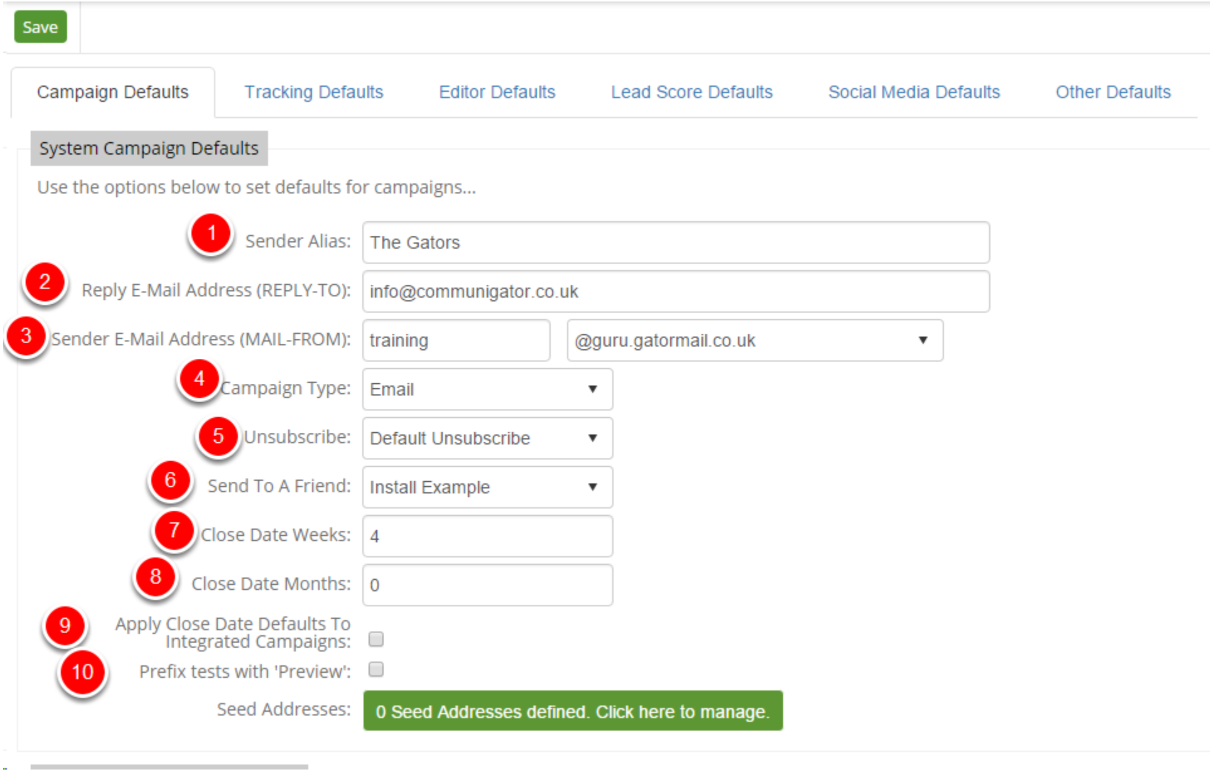
Seed Address allow you to send one or more contacts the campaign regardless of these people existing in the campaign audience.

System Defaults



1. Tools Tab
2. System Defaults

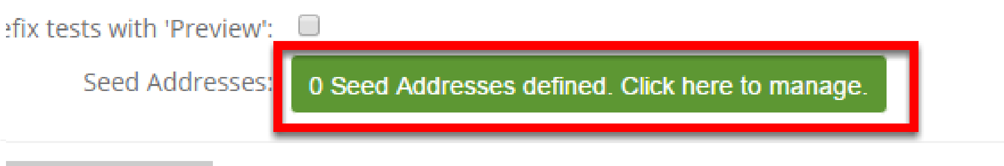
Campaign Defaults



Under Campaign Defaults, you can configure which contacts you want to use for the seed addresses

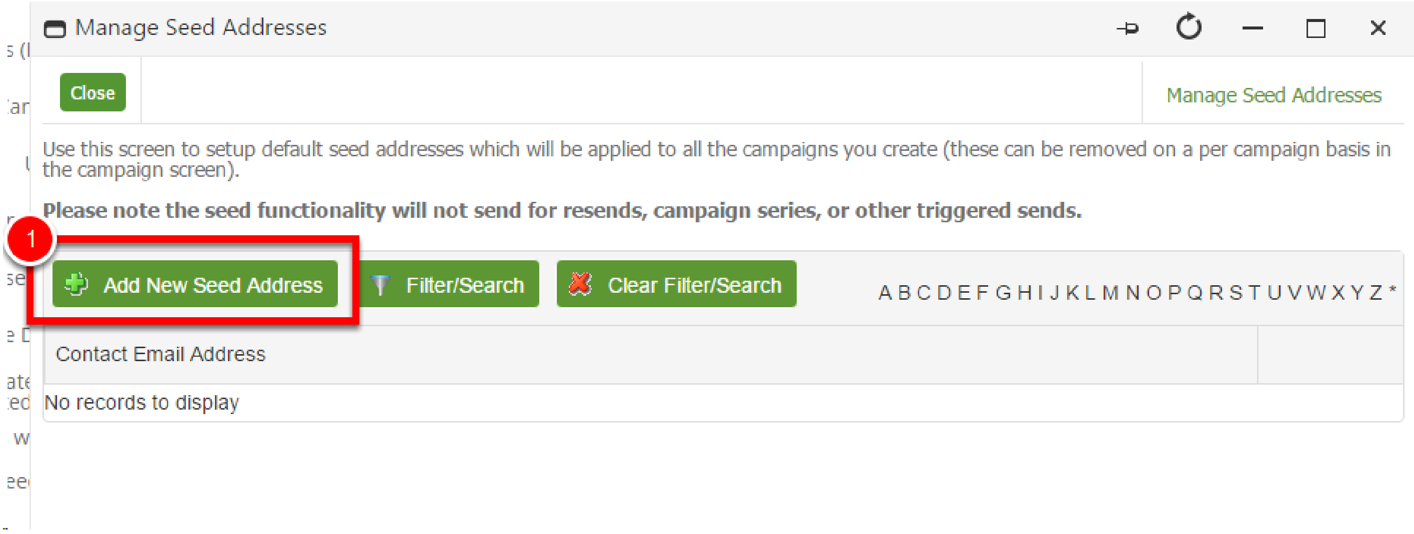
1. The sender alias you wish to use
2. Your choice of reply to address
3. Sender email address
4. Campaign type preferred
5. A bespoke unsubscribe
6. Send to a friend option
7. Close date weeks and/or months
8. Whether to apply the close date to integrated campaign.
9. Apply close date default to integrated campaigns
10. Prefix subject lines in tests with Preview

Manage Seeds



Click the Seed Addresses button to manage seeds

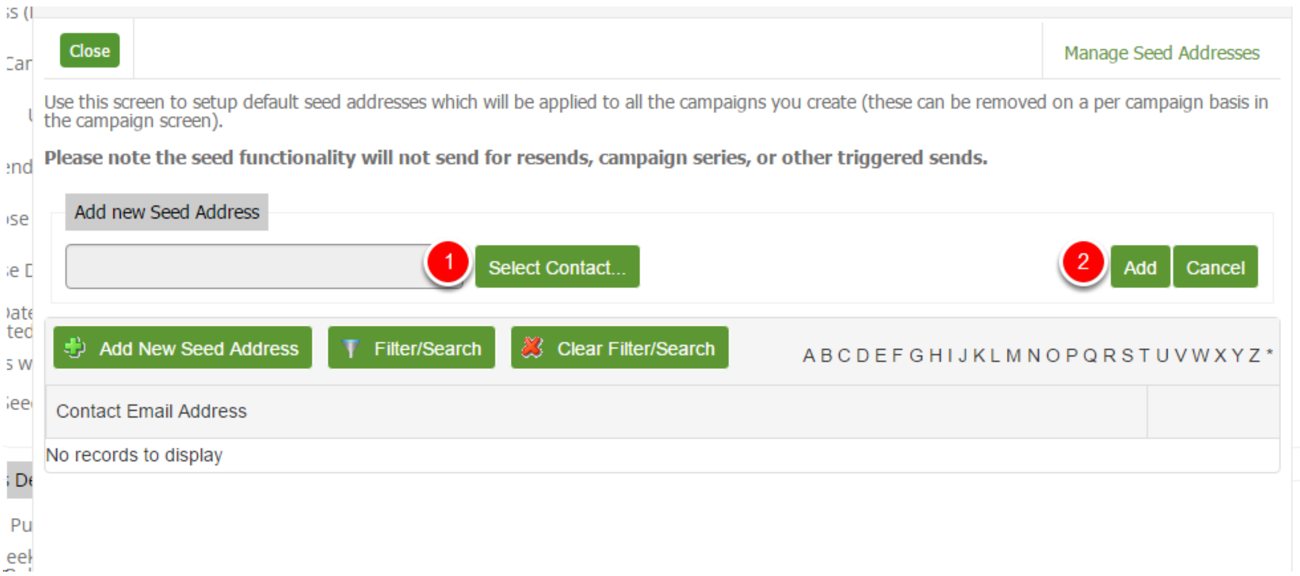
Adding Seeds



A pop up will appear where you can add manage seed addresses

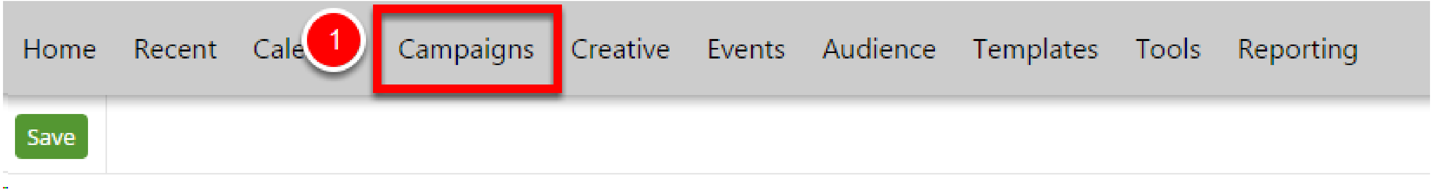
1. Click 'Add New Seed Address'

Contacts

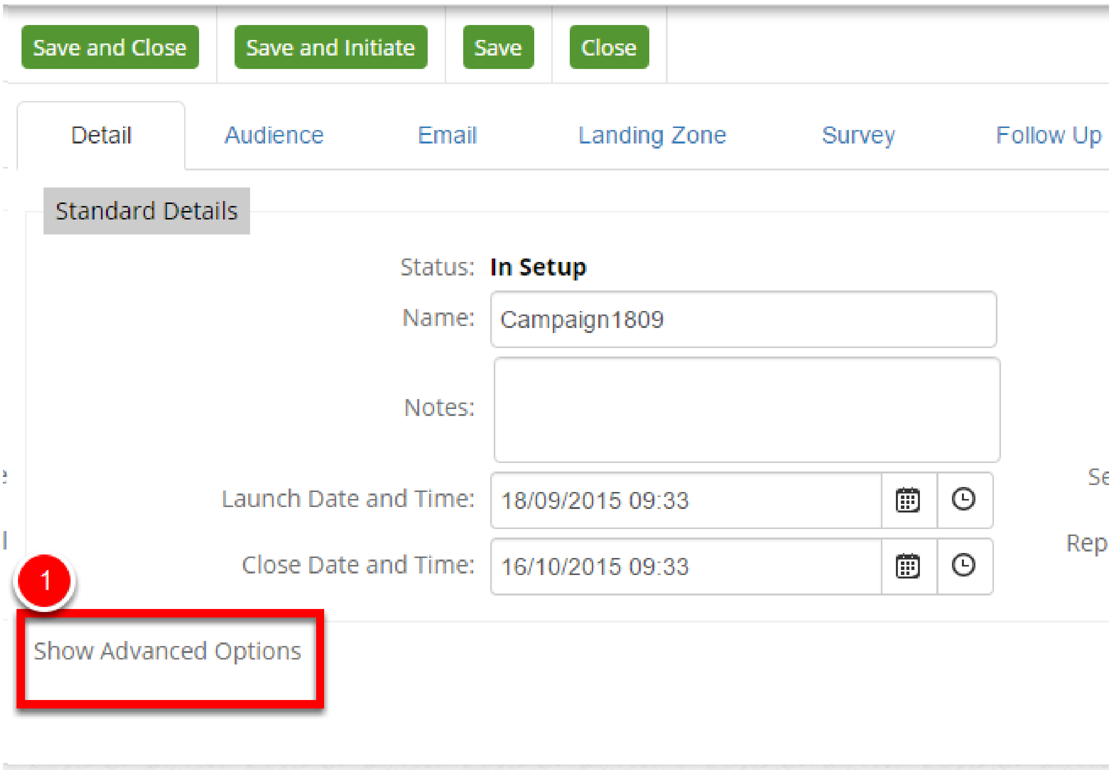


1. Select a contact
2. Click Add contact.

Add as many contacts as needed

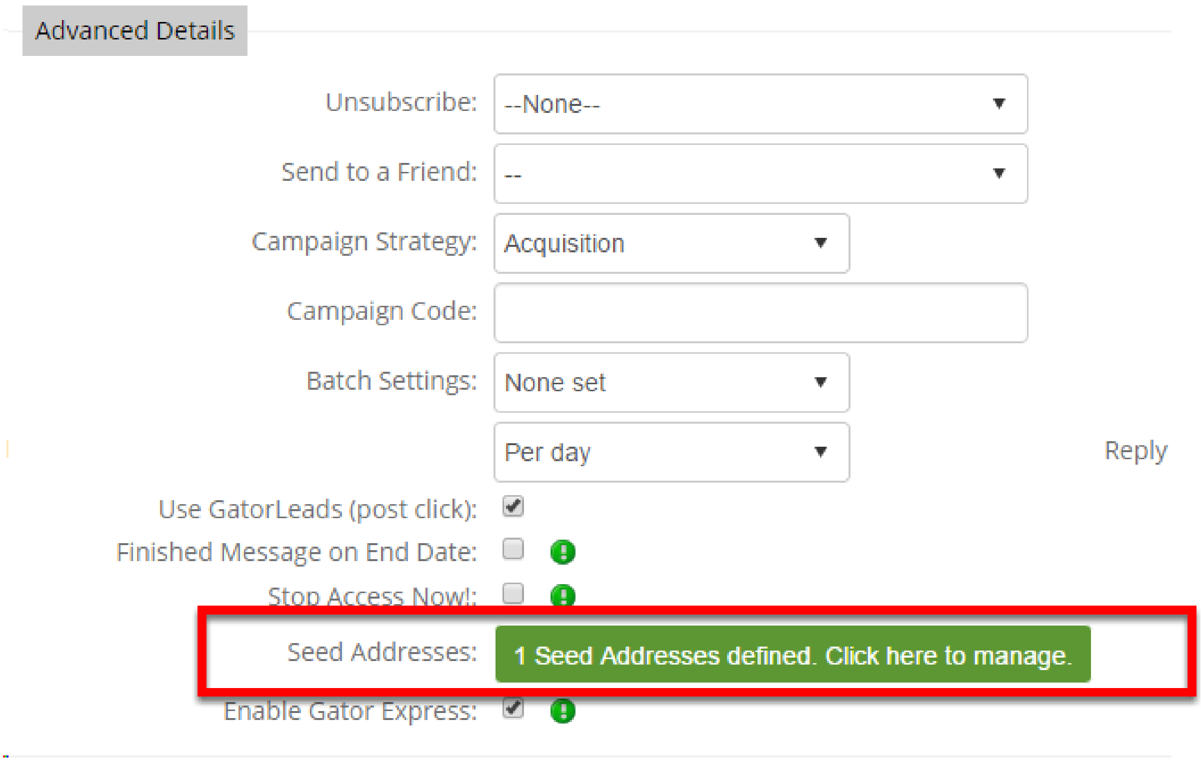


1. Go to your campaigns



1. Once in your campaign, click 'Show Advanced Options'

You can now see the seed addresses



Clicking the button brings up a pop up again showing the seeds.

In here though you can do four things…

1. Add new seeds unique to this campaign.
2. Delete a seed that has been added uniquely to this campaign.
3. Disable some default seeds if for some reason your system defaults are not appropriate.
4. Enable some default seeds if after disabling them you want to re-include again.

When the campaign is initiated it will also send to whomever is in the seed list.

PLEASE NOTE: The seed functionality will not send for resends,campaign series, or other triggered sends.

How to create a campaign that sends out on a contacts birthday.

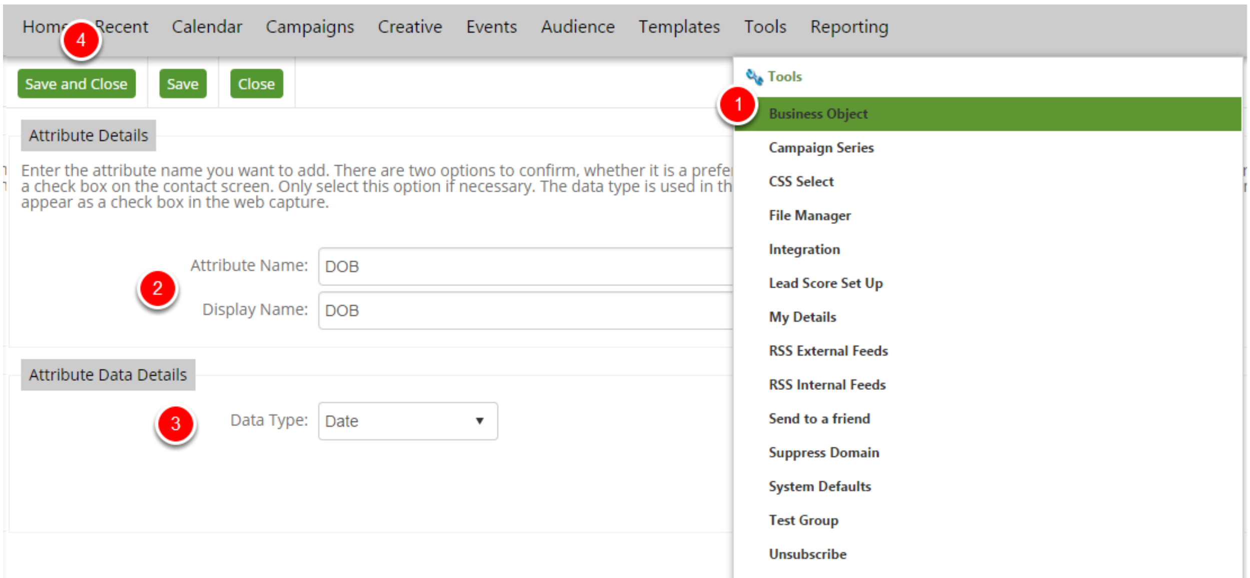
The below article provides a step-by-step guide on how to create a campaign that is triggered to send out on a contacts birthday. This could also be applied to various different scenario's such as Anniversaries, Contract Renewals etc.

To achieve this you would need to setup the following:

- A Business Object to have the field required for the trigger (i.e. Date of Birth, Renewal Date etc.)
- One Group to pull a list of contacts on a daily basis
- Seven Campaigns. One would be required for each day of the week to recur on a weekly basis

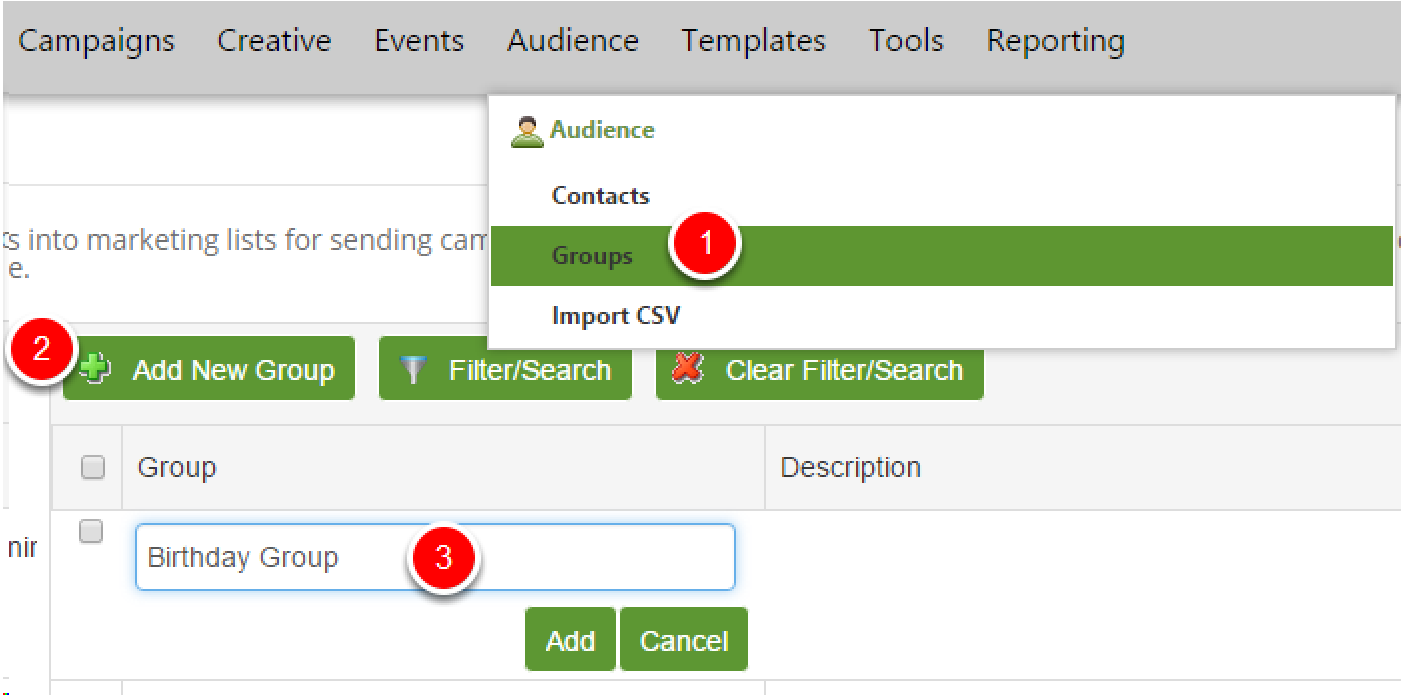
The below example shows how to create a campaign that will send out on a contacts birthday.

Add a new Business Object



1. Go to Tools, Business Objects , Click on Add Attribute
2. Fill in the Attribute Name and the Display Name
3. Select the Data Type relevant to the event, (i.e. Date for a DOB field)
4. Click on Save and Close

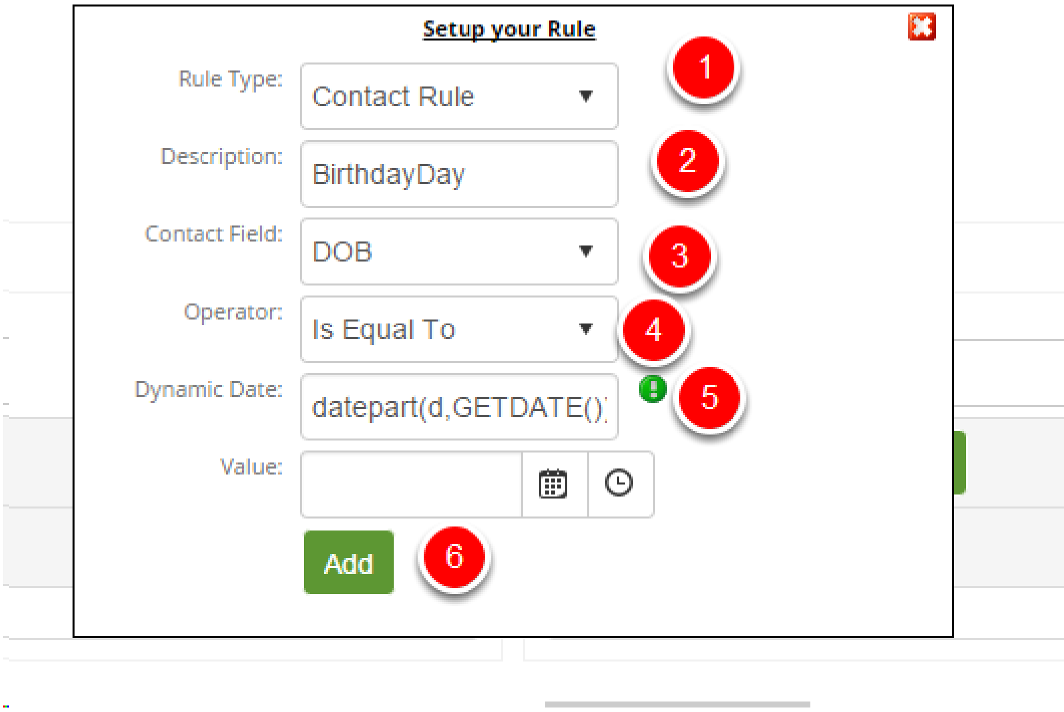
Create the Group



For this to work you will need to add two contact rules to the group one to match the day and one to match the month, this way the contact will only appear in the group once a year.

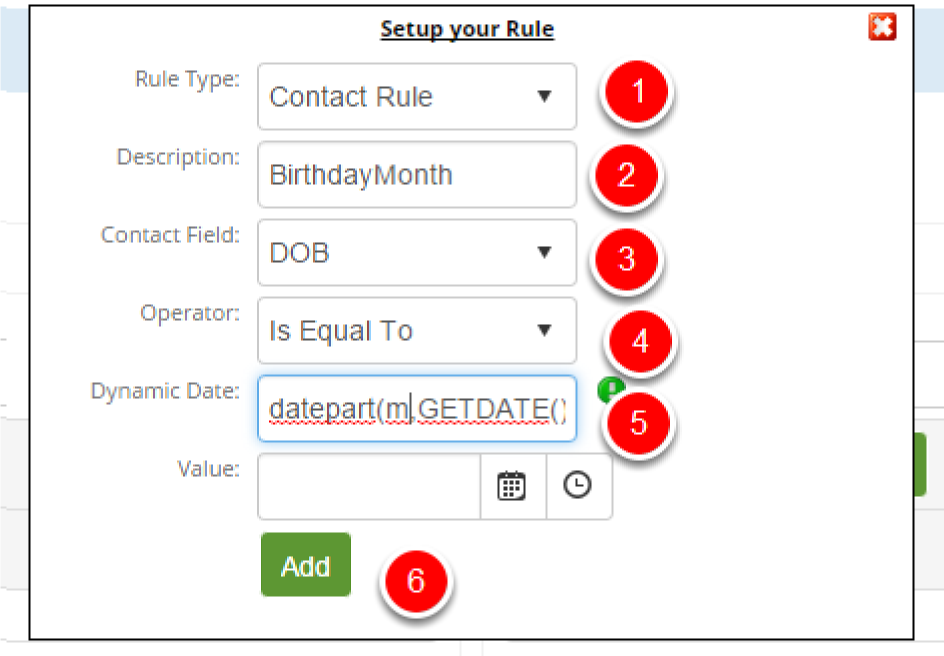
1. Go to Audience, Groups
2. Then select Add New Group
3. Type in the Name and click Add

Add the first rule to match the Day



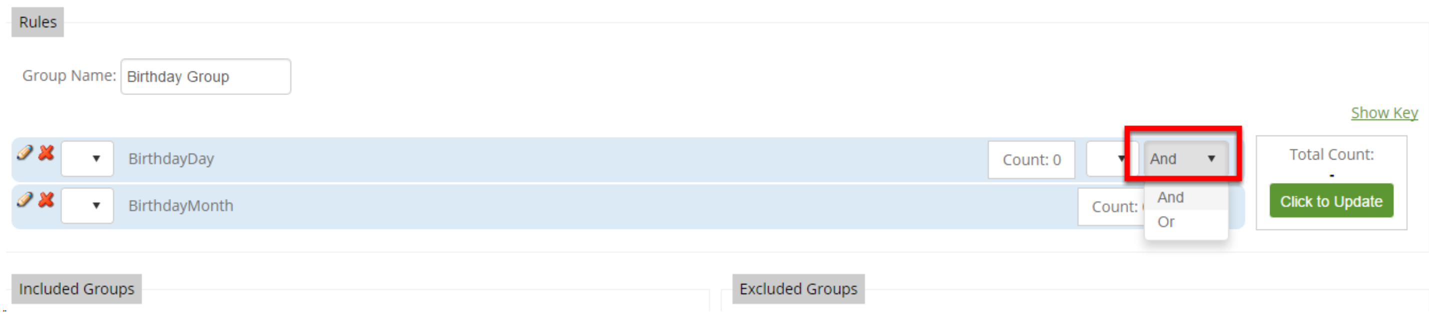
1. Click on Add Rule
2. Select Contact Rule
3. Add a Description and select the new Contact field
4. Next select the Operator to be 'Is Equal To'
5. Enter **datepart(d,GETDATE())** - This statement will get the contacts where their day matches today
6. Click Add

Add the second rule to match the Month



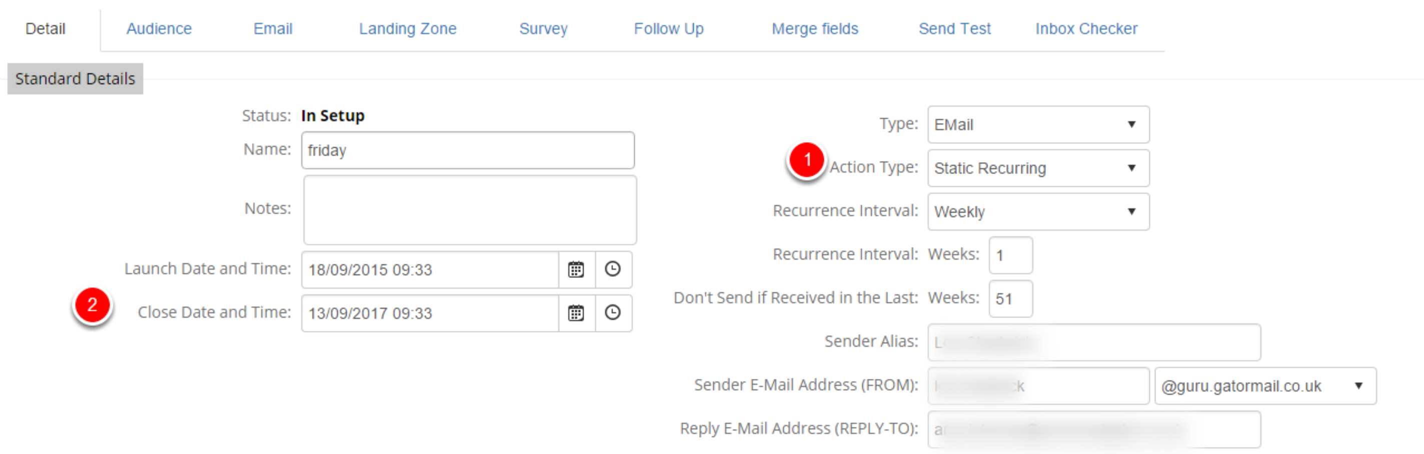
1. Click on Add Rule
2. Select Contact Rule
3. Add a Description and select the new Contact field
4. Next select the Operator to be 'Is Equal To'
5. Enter **datepart(m,GETDATE())** - This statement will get the contacts where their month matches today
6. Click Add

Saving the Group



Once you have added the two rules you need to make sure that the clause used is AND, this can be selected from the drop down menu as circled. This will then get all of the contacts where their DOB day and month matches today's date. Once you have setup the rules relevant to your campaign click save.

Creating the Campaigns



Go to Campaigns and Add a New Campaign.

1. Set the Action Type to Static Recurring - Making sure the Recurrence Interval is set to 1 week, so it sends on a weekly basis. You can set the 'Don't Send if Received in the Last:' to 51 weeks, just to make sure they are not sent again within the same year.
2. You will need to make sure that the End Date is set far enough in the future so that the Campaign sends all year round.

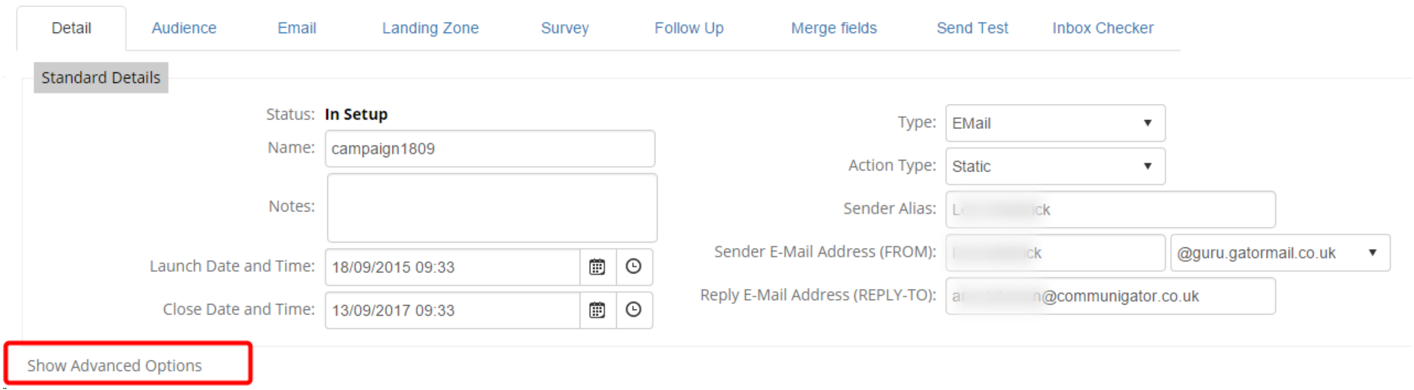
3. You will need to add the new Group to the Audience and set the rest of the Campaign up as normal. (Entering the Alias, Reply-To, Attach the email etc)

Once you have done the first campaign and saved it you will then need to create another six campaigns so you have one for each day of the week. You can then copy the first one you have made but just make sure that you have the correct email design attached and most importantly change the start date to correspond to the correct day, so the campaign send on the right day.

How to send a campaign in batches

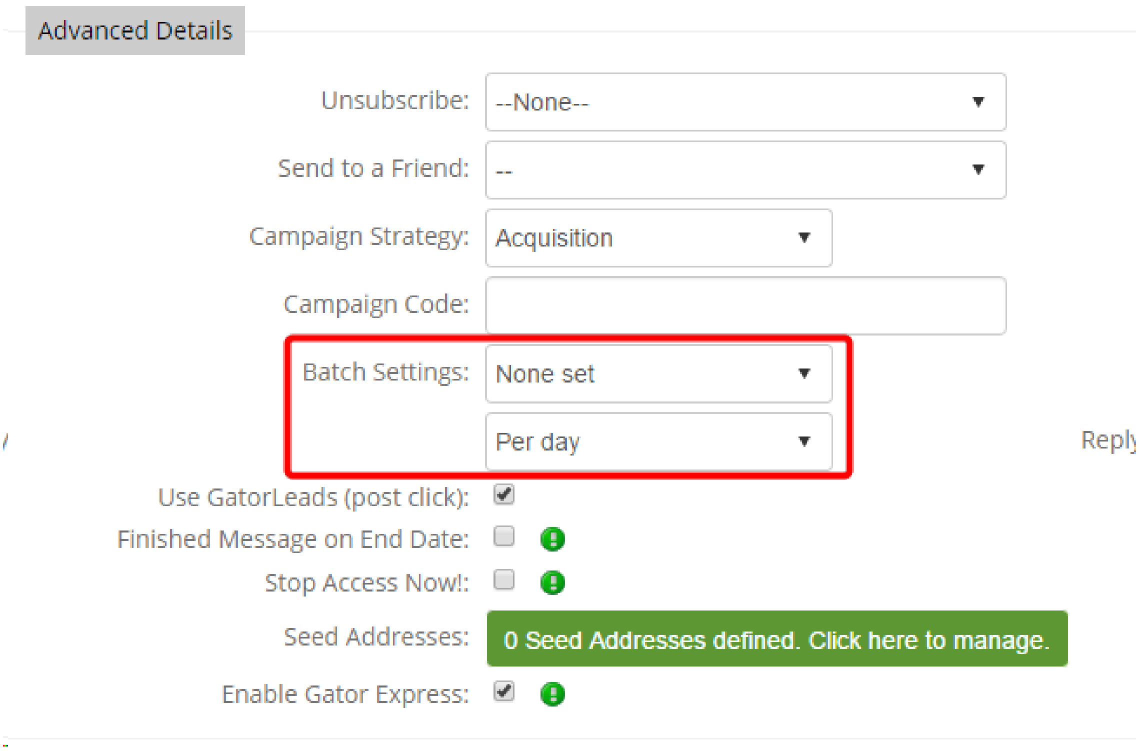
As an alternative to sending a campaign to all recipients at the same time, you can use Batch Settings to set the campaign to send in batches over a number of hours or days. This enables you to review times and days which see a better response level as well as helping you to keep enquiry and responses manageable when sending to very large audiences.

Advanced Options



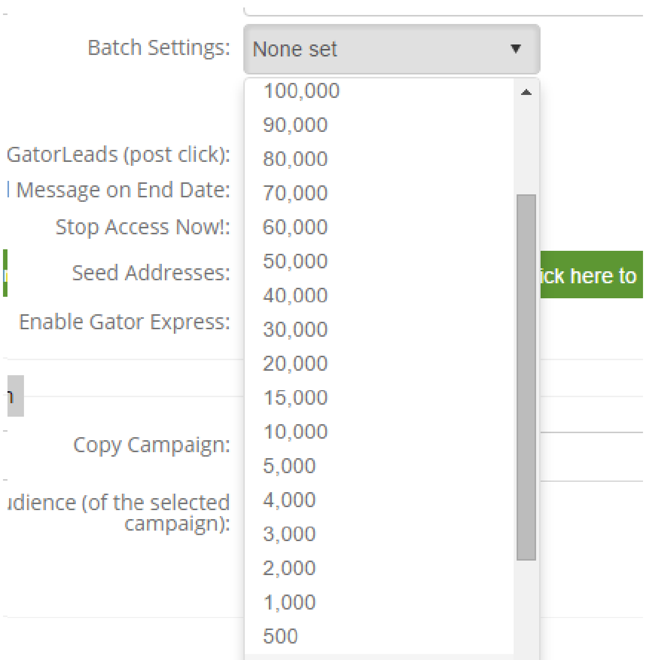
Batch Settings can be found in the Detail tab of Campaign Setup screen. They are hidden by default in the Advanced Options section. So select "Show Advanced Options" to display the settings.

Batch Settings Fields



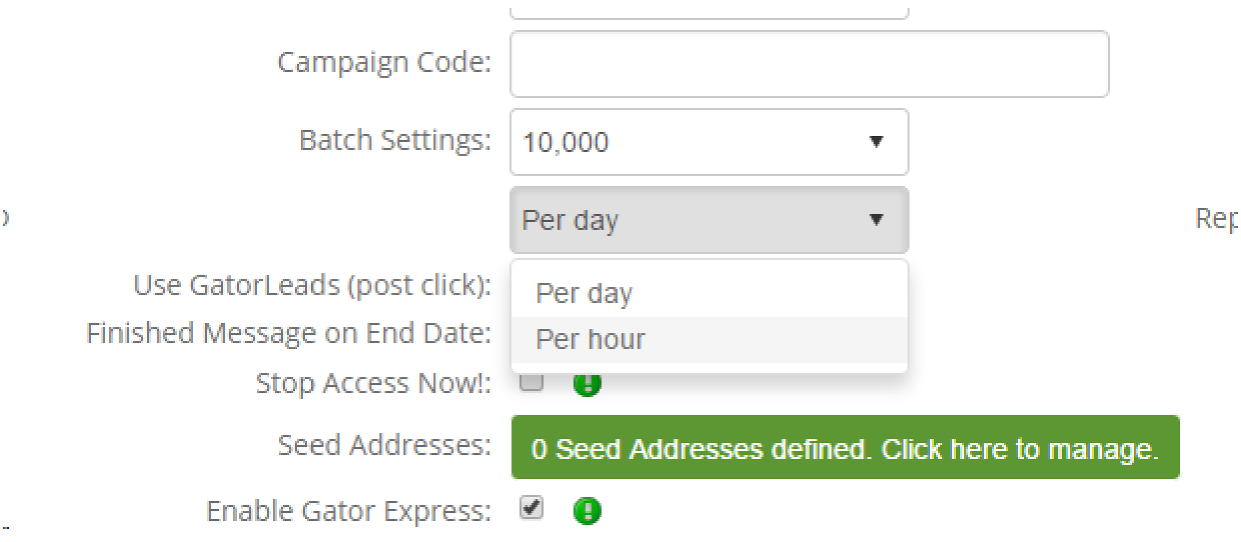
Once you can see the Advanced Details section, the Batch Settings options are in the middle of the left column

Batch Volume



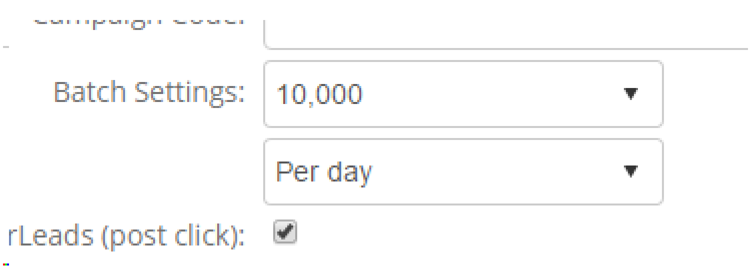
The first field allows you to set a batch volume from a predefined list. The minimum batch size is 5 emails. The maximum is 500,000.

Batch Frequency



The second field allows you to set the batch frequency to either "Per day" or "Per hour"

Initiating your campaign with Batch Settings



Once you have set these two variables, you can initiate your campaign as you would normally. CommuniGator will then automatically batch contacts from your total audience and send the campaign in batches either hourly or daily after the campaign is initiated. The last batch may be smaller than the others where the audience is divisible by the Batch Volume. E.g 102,000 contacts in batches of 10,000 will send ten batches of 10,000 and one batch of 2,000

NOTE - Continuous Sending

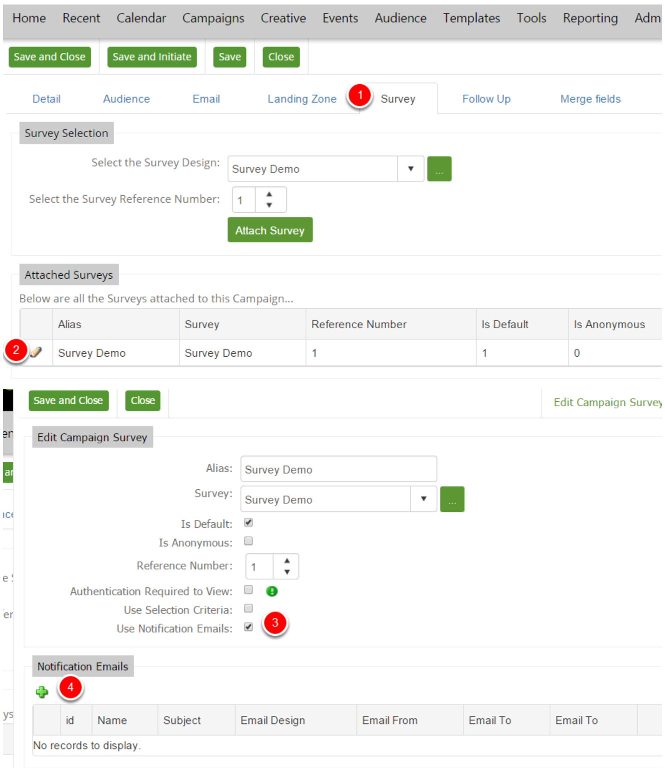
Please note that CommuniGator will continue to send in batches based on your settings on a continuous basis. This means that campaigns will continue sending through the night if set to Per hour or through the weekend if set to Per day. To avoid sending emails at unwanted times, ensure that your Batch Volume is set so that the entire audience is sent the campaign in the desired timeframe. E.g: Sending 500,000 emails Monday to Friday only - You would need to initiate your campaign on Monday and set the Batch Settings to 100,000 per day

Conditional Notifications in Surveys

In the details section of surveys you can add conditional notifications, which will send a notification to an email address of your choosing when the survey is filled in, or when specific questions have been answered.

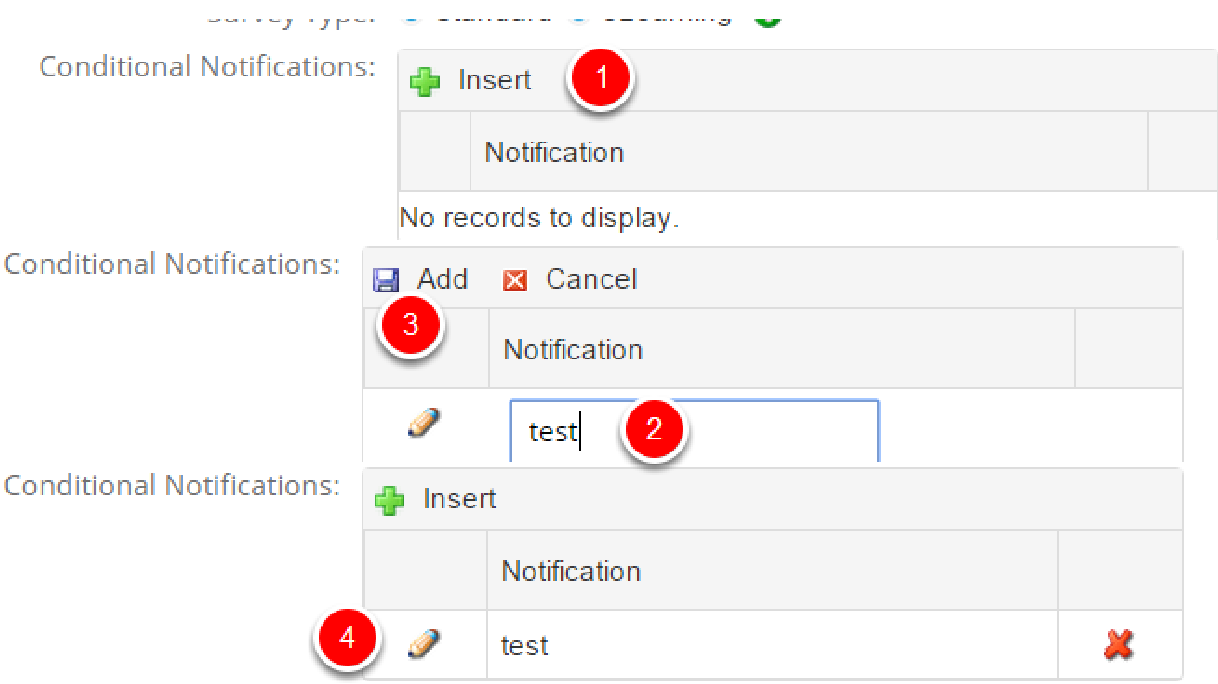
NOTE: Conditional Notifications are only available for questions which use Radio Buttons.

Notification when Survey Complete



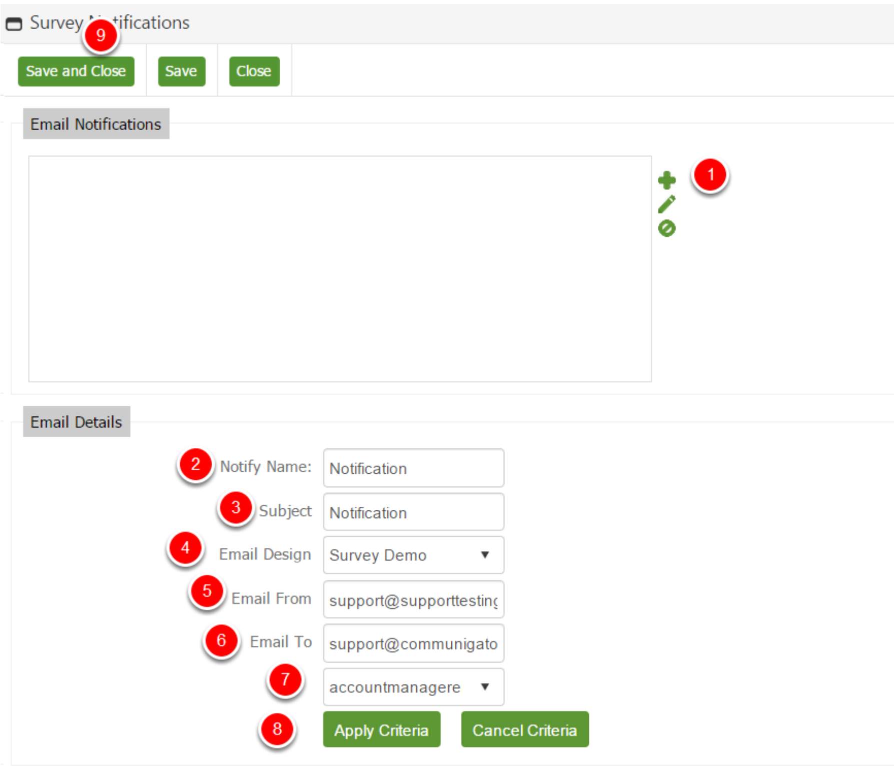
1. Click on the survey tab in the campaign level
2. Click on the pencil to edit the survey
3. Select 'Use Notification Emails' check box
4. Add the emails you would like to receive the notification

Creating the Conditional Notification



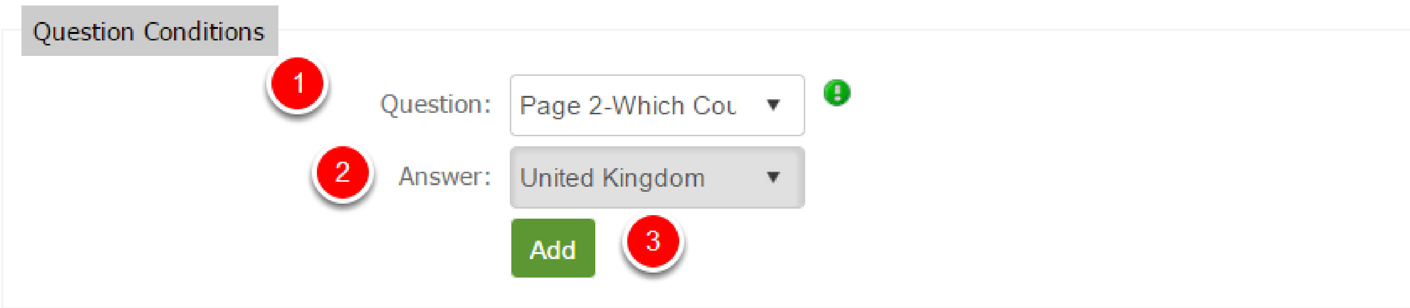
1. When in the survey detail page, click on 'Insert Conditional Notification'
2. Type in the name of the notification
3. Add the notification
4. Once added click on the pencil to edit notification

Email Address Conditional Notifications



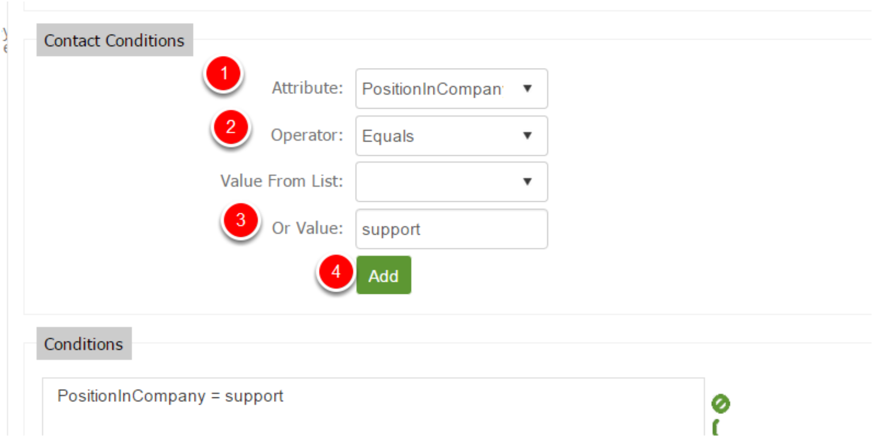
1. Add the email you would like to send notifications to
2. Notification Name
3. Notification Subject
4. Notification Email design
5. The sender address of the notification. NOTE: This address much match the sender address in your campaign
6. Email you would like the notification to be sent to
7. If you do not have a specific email you would like to send the notification to, you can set it to information from the contact record. e.g. notification to be sent to contacts sales representative. NOTE: you can either manually type in an email or use this function; you cannot use both.
8. Apply Criteria
9. Save

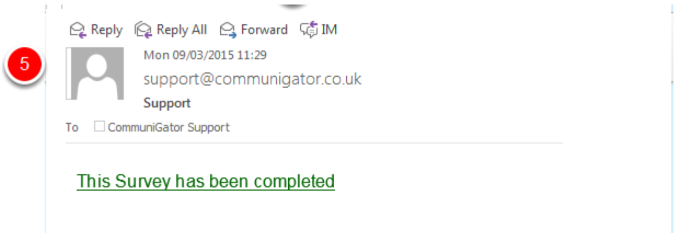
Question Conditions Notifications



1. Select the question you would like the notification applied to (Conditional Notifications are only available for Radio Button Questions)
2. Select the answer you would like the notification applied to
3. Add
4. You will receive and email notification if the question in the condition has the specified answer in the condition

Contact Conditions Notifications



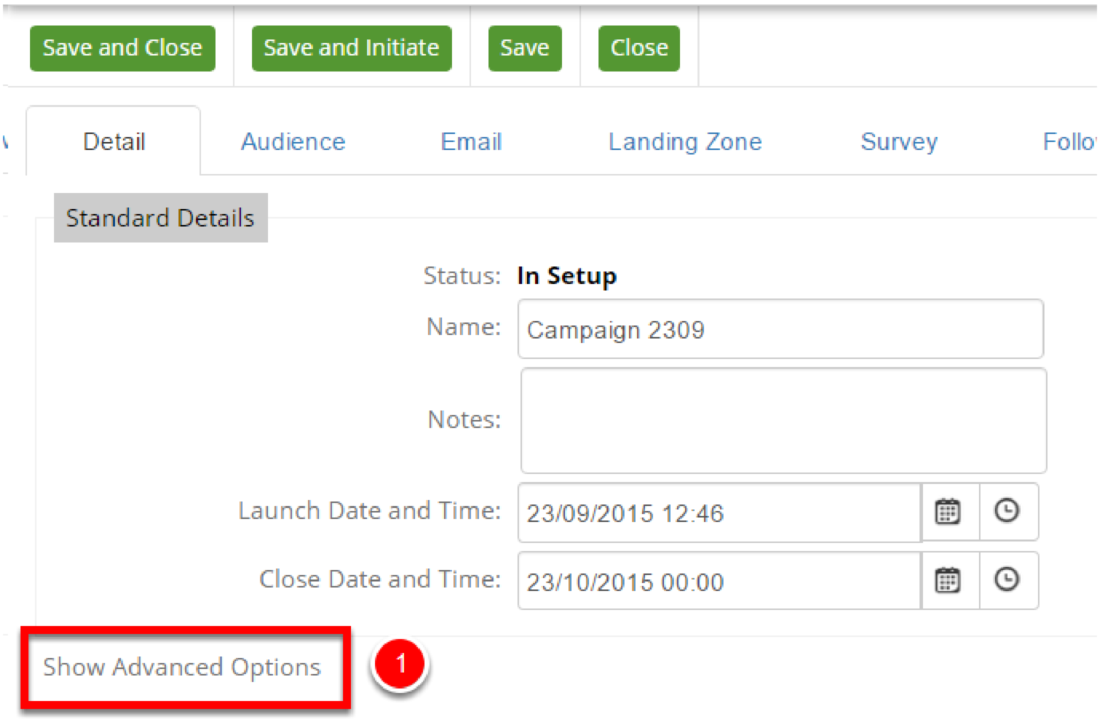


1. Select the contact details you would like the notification applied to. NOTE: this must be an existing business attribute in your CommuniGator system
2. Select the operator you would like the notification applied to. e.g. Equal, Is Like, Is Greater Than
3. Select/Enter the value you would like the notification applied to
4. Add
5. You will receive a notification if the contact record filling in the survey matches your contact condition

Attaching an Unsubscribe and Send to A Friend to a Campaign

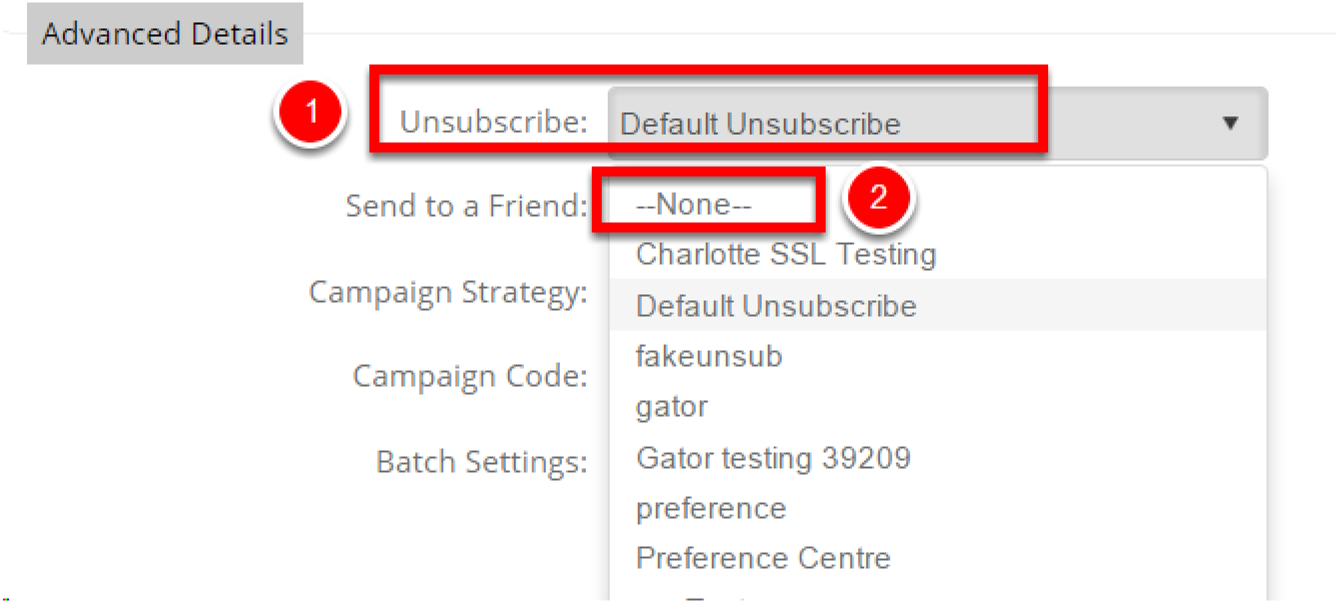
An unsubscribe is a landing zone or survey which, when activated, will write back to the contact's record within CommuniGator and prevent them from receiving undesired emails in the future. After inserting the unsubscribe *link* in your creative email, you need to ensure that there is an actual unsubscribe LZ or survey attached to your campaign in order for the link to work.

Advanced Options



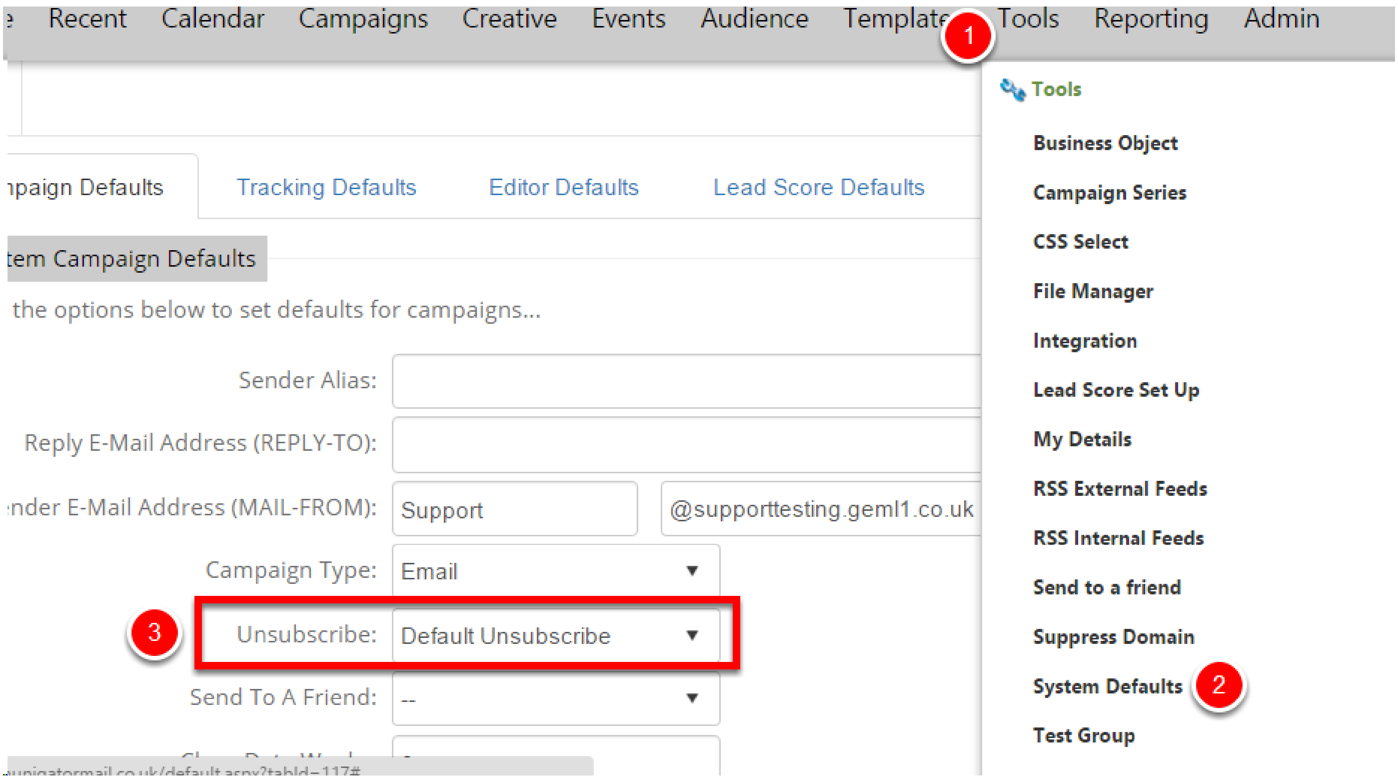
1. When in the Campaign level, on the Detail tab, click on 'Show Advanced Options'

Attaching the Unsubscribe



1. Select the unsubscribe you want to attach to the campaign
2. NOTE: if you want to send a campaign out to all your contacts regardless if they have unsubscribed or not, select none. This ignores the contacts opt in value and sends the email. This should only be done in extremely limited circumstances, for example confirmation of attendance at an event, or a critical IT update for your clients, where recipients do not need to be able to opt out.

Unsubscribe Default

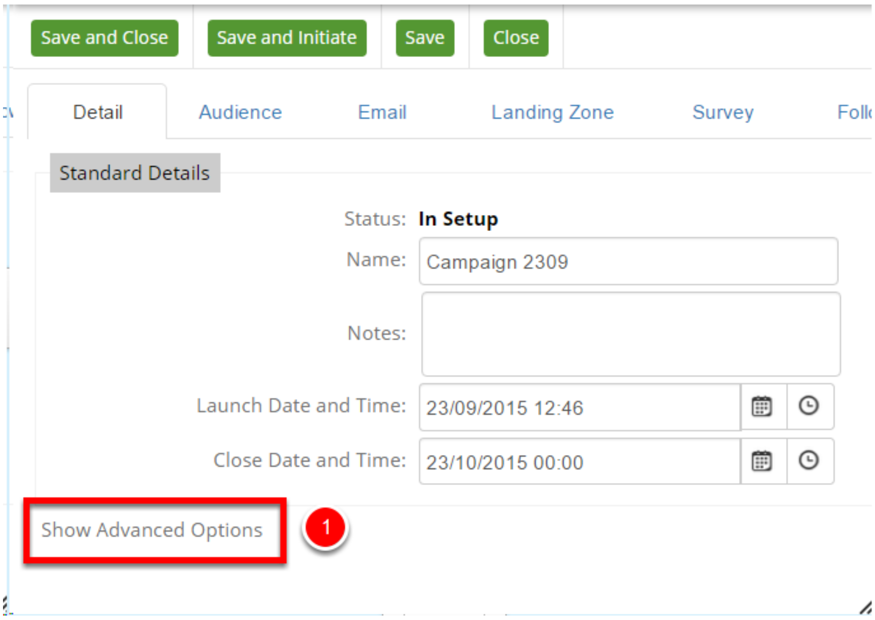


If you do not want to have to attach the unsubscribe every time, you can set an unsubscribe as a default.

1. Tools Tab
2. System Defaults
3. Select the Unsubscribe you would like as a default

Don't forget to save!

Attaching a send to a friend to a campaign



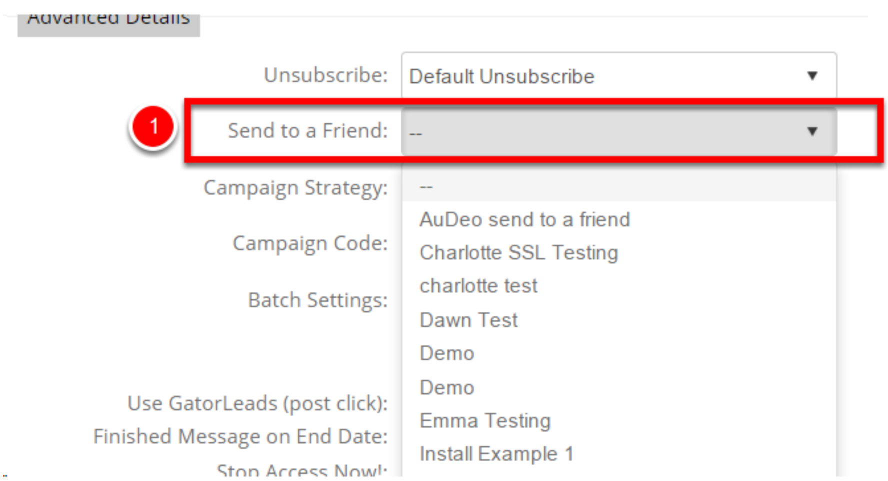
'Send to a friend' is a referral tool you can insert into your emails which allows the recipient to enter the details of a friend who might be interested in the email they received.

The friend will then receive an email asking them to sign up. Once the friend acknowledges, they are subscribed into the system, and will receive the email campaign.

In order for this to work, you need to assign your 'send to a friend' to the campaign itself.

1. Show Advanced Options

Advanced Options



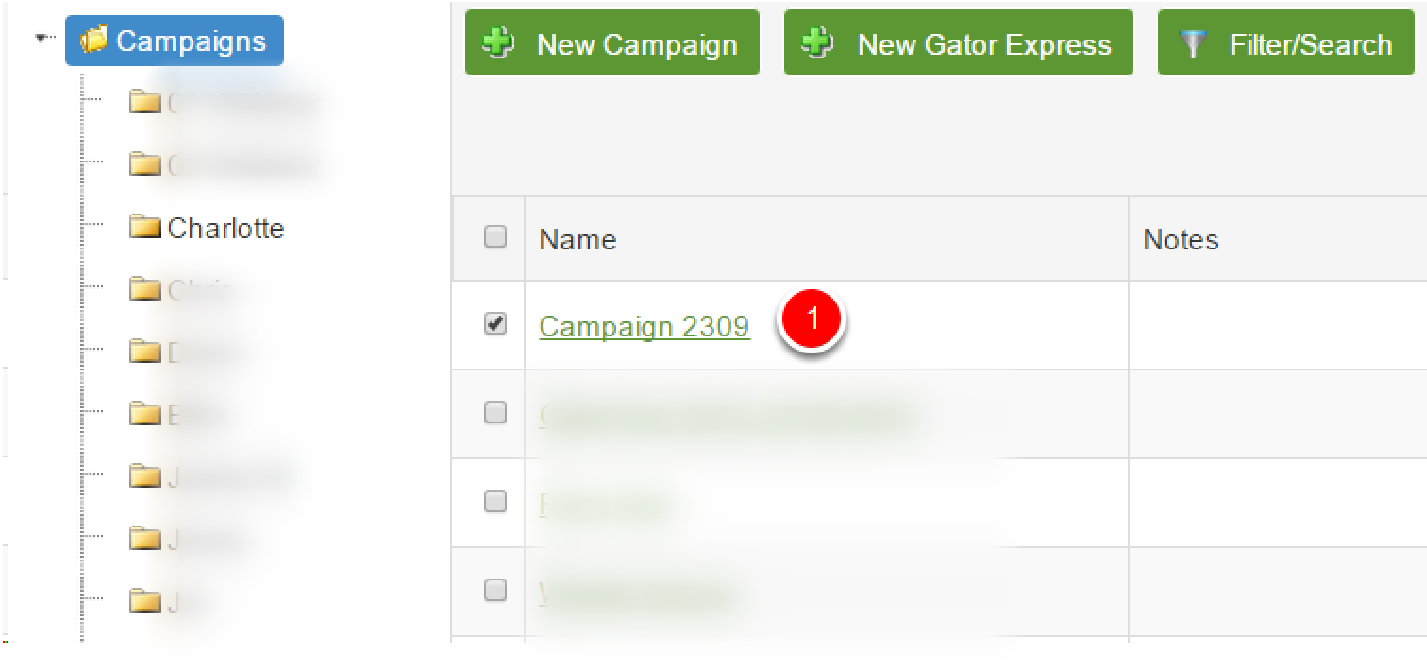
1. Within the advanced options, you have the ability to attach the 'send to a friend' option to your campaign.

Campaign - Moving a campaign into a folder

Moving a Campaign is important as it will allow you to create a structure for your campaigns and also make them easy to locate.

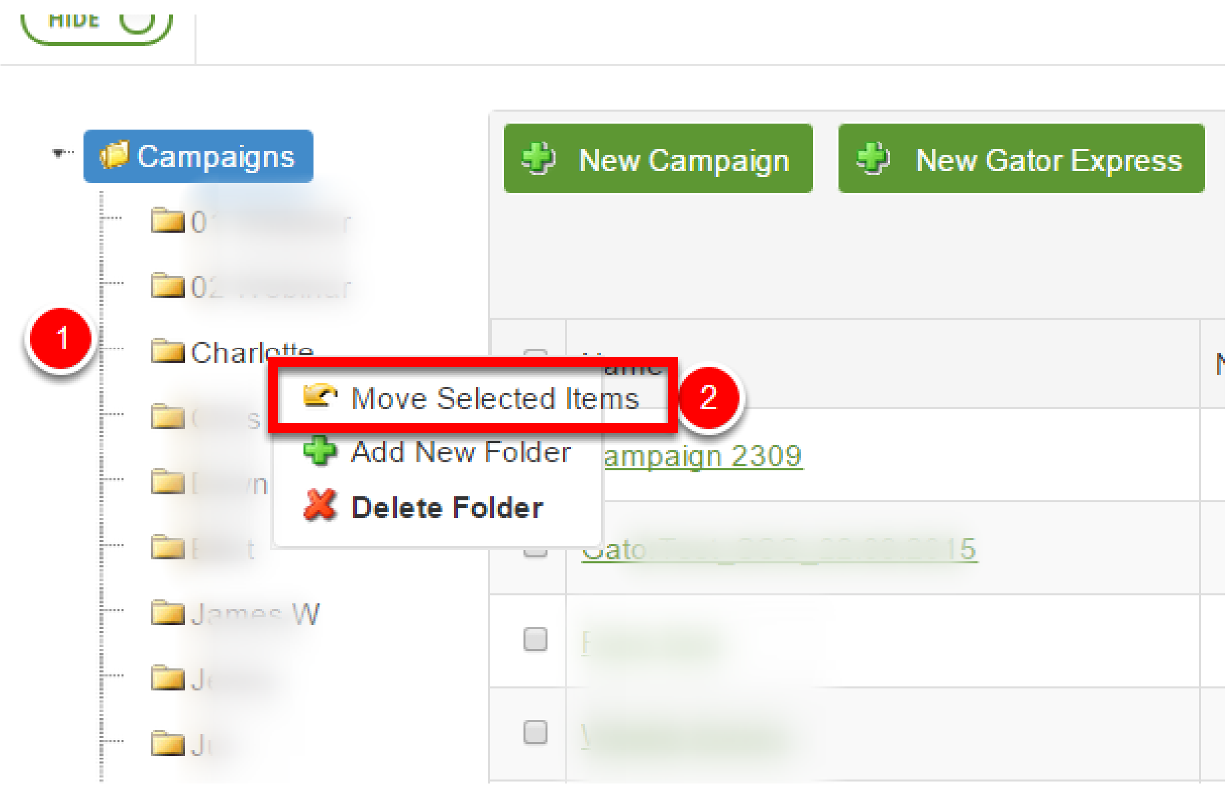
This guide will show you how to move a campaign in 3 easy steps:

Selecting the campaign



1. Click the check box next to the campaign(s) you wish to move

Moving the campaign



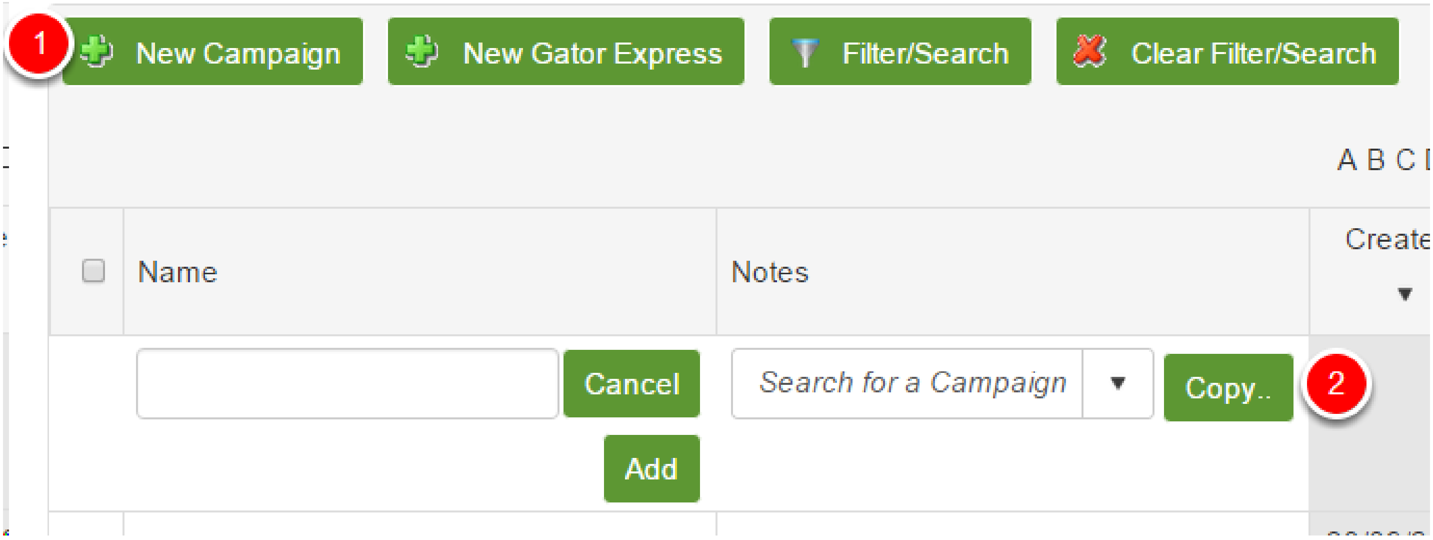
1. Right click on the folder you wish to move your campaign to
2. Select 'Move Selected Items'

How to copy a Campaign

The copy campaign function is a useful and time-saving tool.

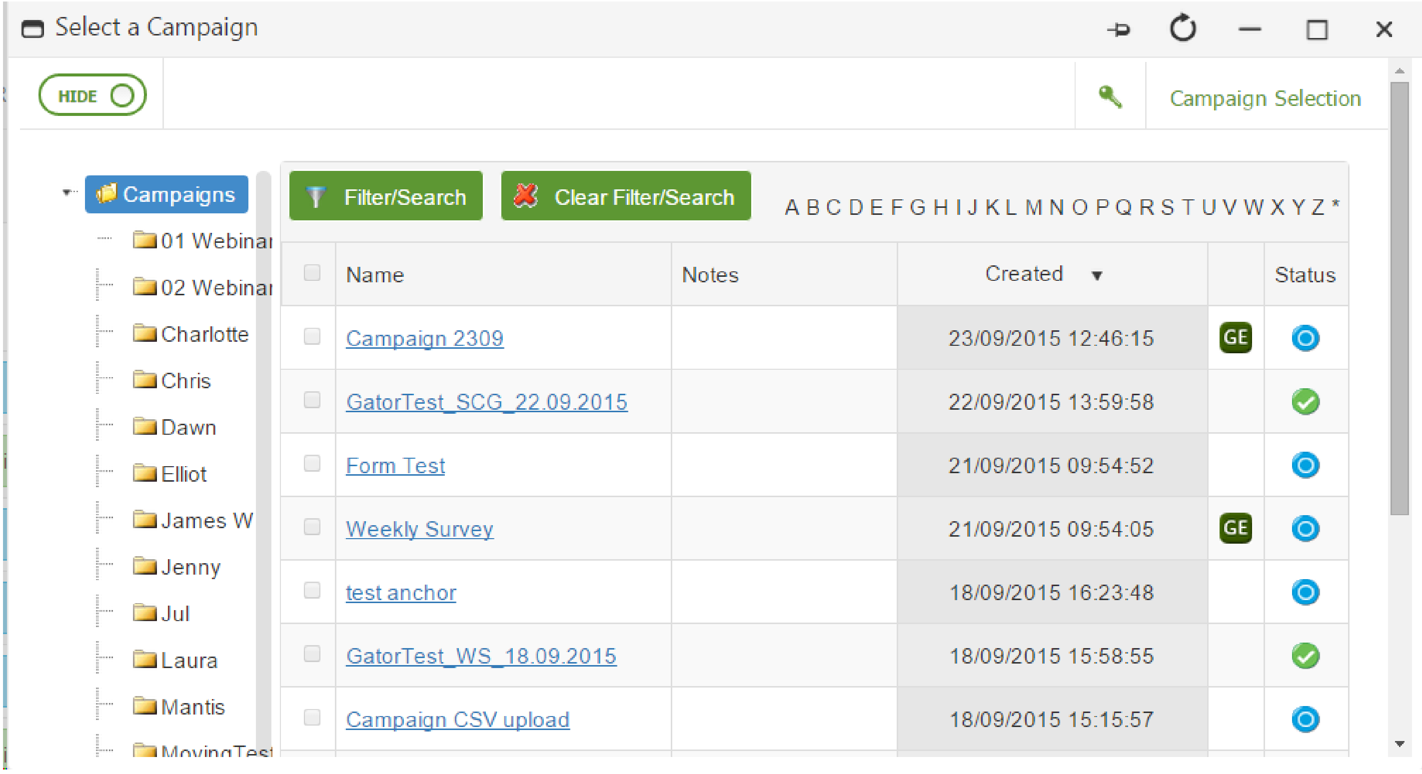
The new campaign will be an exact copy of the one selected. This will include exact copies of the campaign details, any follow ups, surveys or merge fields and audience (if you want to send to a different audience group, make sure to clear this first).

Create a new campaign



1. Click on the 'New Campaign' button under the campaign. This will bring up what you can see above.
2. Then click on the 'Copy' button, located under the 'Notes' header tab

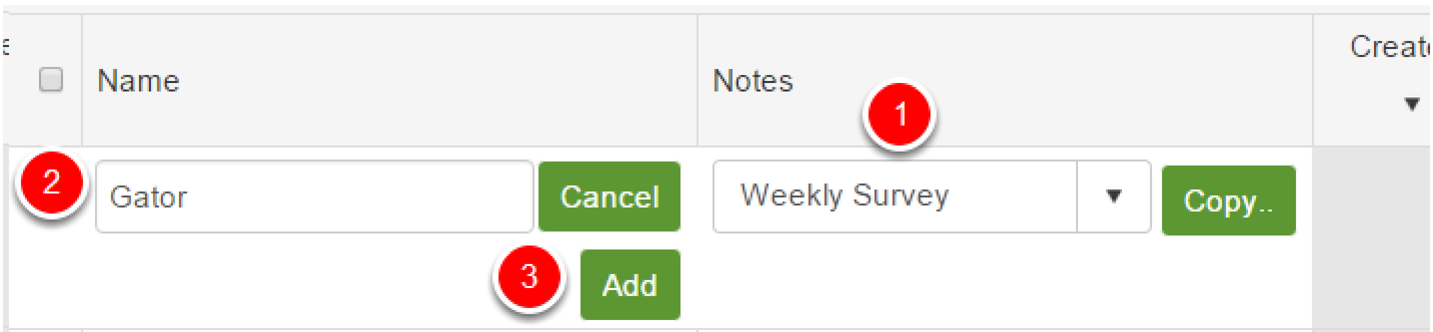
Select the campaign to copy



Once you have clicked the 'Copy' button, a pop up window will be displayed (as shown above).

From here you can search for previous campaigns via the filter button, or by looking through your file directories on the left hand side. Once you have found and clicked on the correct campaign/email you will be returned to the previous menu.

Add the new campaign



1. The file that you copied will be displayed under the notes header, next to the copy button you used earlier.
2. To the left of this, choose the name of the file as you normally would when creating a campaign/email.
3. To finish press add.

Make sure to use clear naming conventions when creating your duplicate campaigns.