

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

The screenshot shows the 'Campaigns' management interface. On the left is a sidebar with a 'Campaigns' folder icon (17) and a list of folders including '01 Webinar', '02 Webinar', '03 Webinar', '04 Webinar', '05 Webinar', '06 Webinar', '07 Webinar', '08 Webinar', '09 Webinar', '10 Webinar', '11 Webinar', '12 Webinar', '13 Webinar', '14 Webinar', '15 Webinar', '16 Webinar', '17 Webinar', '18 Webinar', '19 Webinar', '20 Webinar', '21 Webinar', '22 Webinar', '23 Webinar', '24 Webinar', '25 Webinar', '26 Webinar', '27 Webinar', '28 Webinar', '29 Webinar', '30 Webinar', '31 Webinar', '32 Webinar', '33 Webinar', '34 Webinar', '35 Webinar', '36 Webinar', '37 Webinar', '38 Webinar', '39 Webinar', '40 Webinar', '41 Webinar', '42 Webinar', '43 Webinar', '44 Webinar', '45 Webinar', '46 Webinar', '47 Webinar', '48 Webinar', '49 Webinar', '50 Webinar', '51 Webinar', '52 Webinar', '53 Webinar', '54 Webinar', '55 Webinar', '56 Webinar', '57 Webinar', '58 Webinar', '59 Webinar', '60 Webinar', '61 Webinar', '62 Webinar', '63 Webinar', '64 Webinar', '65 Webinar', '66 Webinar', '67 Webinar', '68 Webinar', '69 Webinar', '70 Webinar', '71 Webinar', '72 Webinar', '73 Webinar', '74 Webinar', '75 Webinar', '76 Webinar', '77 Webinar', '78 Webinar', '79 Webinar', '80 Webinar', '81 Webinar', '82 Webinar', '83 Webinar', '84 Webinar', '85 Webinar', '86 Webinar', '87 Webinar', '88 Webinar', '89 Webinar', '90 Webinar', '91 Webinar', '92 Webinar', '93 Webinar', '94 Webinar', '95 Webinar', '96 Webinar', '97 Webinar', '98 Webinar', '99 Webinar', '100 Webinar'. The main area contains a table of campaigns with columns: Name (9), Notes (10), Created (11), Status (14), and Action (15). The table lists several campaigns with their names, notes, creation dates, and status. The bottom of the interface shows a pagination bar with 'Page size: 10' (19) and '240 items in 24 pages' (20). The top right corner has a 'Campaign Selection' dropdown (7).

Name	Notes	Created	Status	Action
GatorTest_MKT_14-09-2015_09-07-42		14/09/2015 09:08:05	Initiate	Initiate
GatorTest_MKT_11-09-2015		11/09/2015 11:16:02	Initiate	Initiate
Comcast		08/09/2015 12:09:53	View Results	View Results
GatorTest_MKT_07-09-2015		07/09/2015 11:57:28	View Results	View Results
GatorTest_MKT_04-09-2015_17-00-48		04/09/2015 17:01:02	Initiate	Initiate
GatorTest_MKT_04-09-2015_17-00-50		04/09/2015 17:00:50	Initiate	Initiate
GE		04/09/2015 16:09:06	Initiate	Initiate
GE		04/09/2015 16:05:29	Initiate	Initiate
GE		04/09/2015 16:04:52	Initiate	Initiate
GE		04/09/2015 12:53:02	Initiate	Initiate

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

The screenshot shows the 'Campaign Detail - GatorExpress Webinar' interface. At the top, there are buttons: 'Save and Close', 'Save and Initiate', 'Save', and 'Close'. Below these are tabs: 'Detail', 'Audience', 'Email', 'Landing Zone', 'Survey', 'Follow Up', 'Merge fields', 'Send Test', and 'Inbox Checker'. The 'Detail' tab is active, showing the 'Standard Details' section. The form contains the following fields:

- 1. Status: In Setup
- 2. Name: Campaign 1409
- 3. Notes: (empty text area)
- 4. Launch Date and Time: 24/09/2015 11:09
- 5. Close Date and Time: 16/10/2015 17:00
- 6. Type: Email
- 7. Action Type: Static
- 8. Sender Alias: lee.chadwick
- 9. Sender E-Mail Address (FROM): Support
- 10. Reply E-Mail Address (REPLY-TO): support@communicator.co.uk
- 11. Show Advanced Options button

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-recurring, 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

Hide Advanced Options

Advanced Details

1

Unsubscribe:

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2

Send to a Friend:

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3

Campaign Strategy:

Acquisition

4

Campaign Code:

5

Batch Settings:

None set

Per day

6

Use GatorLeads (post click):

☒

7

Finished Message on End Date:

☐

!

8

Stop Access Now!:

☐

!

9

Seed Addresses:

0 Seed Addresses defined. Click here to manage.

10

Dedupe Audience:

☒

!

11

Enable Gator Express:

☒

!

12

Landing Zone URL:

http://supporttesting.geml1.co.uk/support

13

Cc E-Mail Address:

14

Bcc E-Mail Address:

15

Sender Alias Dynamic:

16

Sender E-Mail Address Dynamic (FROM):

17

Reply E-Mail Address Dynamic (REPLY-TO):

18

Cc E-Mail Address Dynamic:

19

Bcc E-Mail Address Dynamic:

20

Select Approval Groups:

charlotte test

Copy Campaign

Copy Campaign:

Search for a Campaign

...

Include the audience (of the selected campaign):

☐

Copy

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 select 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

Detail

Audience

Email

Landing Zone

Survey

Follow Up

Merge fields

Send Test

Inbox Checker

Audience Type

Please select the audience type for this campaign...

Audience Type

☒ Groups

☐ Audience Selection Criteria

Groups

With the groups option selected choose a group from the drop-down provided below. The group must already exist for it to appear in this list.

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Select

Clear

Audience Count

Count Audience

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

The screenshot shows the 'Audience Type' section with 'Audience Selection Criteria' selected. Below it is the 'Audience Selection Criteria' section with a list of options and a large text area for criteria. At the bottom is the 'Audience Count' section with a 'Count Audience' button. Red circles with numbers 1, 2, and 3 point to the 'Audience Selection Criteria' radio button, the criteria text area, and the 'Count Audience' button respectively.

Audience Type
Please select the audience type for this campaign...

Audience Type ☐ Groups ☒ Audience Selection Criteria

Audience Selection Criteria
With audience selection criteria there are many options available to you...

- Manually apply an audience based on "CSVImport = my csvimport attribute".
- Manually apply an audience using contact data.
- Add multiple selection criteria for more complex audiences.
- If you have used a "Campaign Assignment" when uploading the CSV file, this box will populate automatically with "CSVCampaigns = my campaign name".
- Please refer to the online help for more information and examples.

Audience Count
Count Audience

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

The screenshot shows the 'Count Audience' section with a 'Count Audience' button. Below it is a table showing audience counts. Red circles with numbers 1 through 5 point to the 'Audience: 0', 'Unsubscribes/Opt-Out: 0', 'Undeliverables (Hit Bounce Limit): 0', 'Duplicates: 0', and 'FINAL AUDIENCE: 0' rows respectively.

Audience Count
Count Audience

1	Audience: 0	2	☒
3	Unsubscribes/Opt-Out: 0		☒
	Undeliverables (Hit Bounce Limit): 0		☒
	Duplicates: 0		☒
5	FINAL AUDIENCE: 0		☒

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

Detail Audience Email Landing Zone Survey Follow Up Merge fields Send Test Inbox Checker

Email Type

Please select the type of email you would like to setup...

Email Type: ☒ Standard 1 ☐ Split Test

Standard Email Campaign

Simple, attach an email to the campaign that the entire audience will receive. If desired attach multiple emails to the campaign and use selection criteria to decide which email the contact receives.

Select the Email Design: Search for an Email 2

Subject Line: Custom Li... 3

4

Attach Email 5

Attached Emails 6

Below are all the Emails attached to this Campaign...

7	8	9	10	11	12	13	14	15	16
Alias	Design	Subject Line	Is Default	TextOnly	Articles	Events	Dynamic Content		
 Gator Design	GatorExpress Webinar Design	Webinar	0	0					

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 formatter 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

Save and Close
Save
Close

Setup Articles

Please add or remove articles for your email by 1) selecting the article block you wish to add articles to and 2) moving articles between the left (excluded) and the right (included) grids.

Article Block

Article_1

🔥
✖

Search

Article Title

Search
Clear

Article Title

Created Date

Mobile DevTools: Remote Debugging for Android with Screencast - Google Chrome	14/09/2015 10:02:42
4 Ways to Get Rid of a Hangover - wikiHow	11/09/2015 10:39:10
Email Marketing - Version 7	10/09/2015 13:27:42
5 Killer Sales Email Opening Lines - CommuniGator	10/09/2015 13:21:06

➡

➡

⬆

⬆

Article Title

Created Date

GatorExpress	19/08/2015 11:15:42
Mobile DevTools: Remote Debugging for Android with Screencast - Google Chrome	14/09/2015 10:21:04
Mobile DevTools: Remote Debugging for Android with Screencast - Google Chrome	14/09/2015 10:09:25

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 or 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

Email Type

Please select the type of email you would like to setup...

Email Type: ☐ Standard ☒ Split Test **1**

Split Test Campaign

Split test allows you to attach up to two different emails and two different subject lines to the campaign. By initiating these to a proportion of your audience, you then send the remaining audience the winning design.

The winning design send can be automatic or manual. For automatic, specify the amount of days after the original send to complete the split test. For manual you must choose the winning design from the campaign results.

Setup Events

Sample Size: ☐ Actual ☒ Percentage **5**

Percentage: 10 % **6**

Send Meth: ☒ Manual **8** ☐ AutoSend **7**

Hours: 1 **9**

Days: 1

AutoSend Criteria: ☐ Open Rate ☒ Click Through **10** **11**

Design 1: Search for an Email **2**

Alias 1:

Sender Alias 1: **3**

Subject Line 1: Custom Li... **4**

Design 2: Search for an Email

Alias 2:

Sender Alias 2:

Subject Line 2: Custom Li...

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 lines 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 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.

Campaign - Landing Zone

[Detail](#) [Audience](#) [Email](#) [Landing Zone](#) [Survey](#) [Follow Up](#) [Merge fields](#) [Send Test](#) [Inbox Checker](#)

Landing Zone Selection

Select the LZ Design: ... 1

Select the LZ Reference Number: 2

Attach Landing Zone 3

Attached Landing Zones

Below are the Landing Zones attached to this Campaign... 7 8 9 10 11

Alias	Design	Reference Number	Is Default	Auto Resend Email	Authentication	Articles	Dynamic Content
No records to display.							

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

CommuniGate

Edit Campaign Landing Zone

Save and Close Close Edit Campaign LZ

Edit Campaign LZ

1 Alias: Charlotte SSL Testing

2 Landing Zone: Charlotte SSL Testing

3 Reference Number: 1

Is Default: ☒

Auto Resend Email: ☐

Authentication Required to View Landing Zone: ☐

Use Selection Criteria: ☐

Use User Attributes: ☐

Use Notification Emails: ☐

Landing Zone Selection

Select the

Select the LZ Reference

Attached Landing Zones

Below are all the Landing Zo

Alias

Charlotte SSL Testing

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.

Edit Campaign LZ

Alias: Charlotte SSL Testing

Landing Zone: Charlotte SSL Testing

Reference Number: 1

Is Default: ☒

Auto Resend Email: ☐

Authentication Required to View Landing Zone: ☐

Use Selection Criteria: ☐

Use User Attributes: ☐

Use Notification Emails: ☐

"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

Survey Selection

Select the Survey Design: ... 1

Select the Survey Reference Number: 2

Attach Survey 3

Attached Surveys

Below are all the Surveys attached to this Campaign...

4	Alias	Survey 5	Reference Number 6	Is Default 7	Is Anonymous 8	Authentication Required 9	
			1	1	0	False	

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

DetailAudienceEmailLanding ZoneSurveyFollow UpMerge fieldsSend TestInbox Checker

Attached Follow Ups

Follow Up Name:

Attach Follow Up

Below are all the follow up emails attached to this Campaign...

	Name	Description	Send Type	
	Follow up Non-Opens		Scheduled	

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

Save and Close

Close

Follow Up Details

Name: Follow up Non-Opens

Description:

Follow Up Timing

☐ Send Without Delay ☒ Send With Timing Options

Hours: 1

Days: 0

Weeks: 0

Months: 0

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

Follow Up Action Triggers

The Actions below by default have an implicit 'AND' which means all rules apply when checked. If you would prefer an 'OR' for either rules then please check the 'Or' checkbox below.

'Or' Actions ?

Email:

No Action

Email Not Opened

Email Opened

Landing Zone:

No Action

Landing Zone Not Hit

Landing Zone Hit

Web Page:

No Action

Web Page Not Hit

Web Page Hit

Please Add Web Page (http://) for wildcards please use % (http://%):

http://

Survey:

No Action

Survey Not Complete

Survey Complete

Event:

No Action

Event Not Booked

Event Booked

Event Not Attended

Event Attended

Campaign To Send

Campaign To Send:

Current Campaign

Other Campaign

Campaign:

followup

Select

New Subject Line:

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:

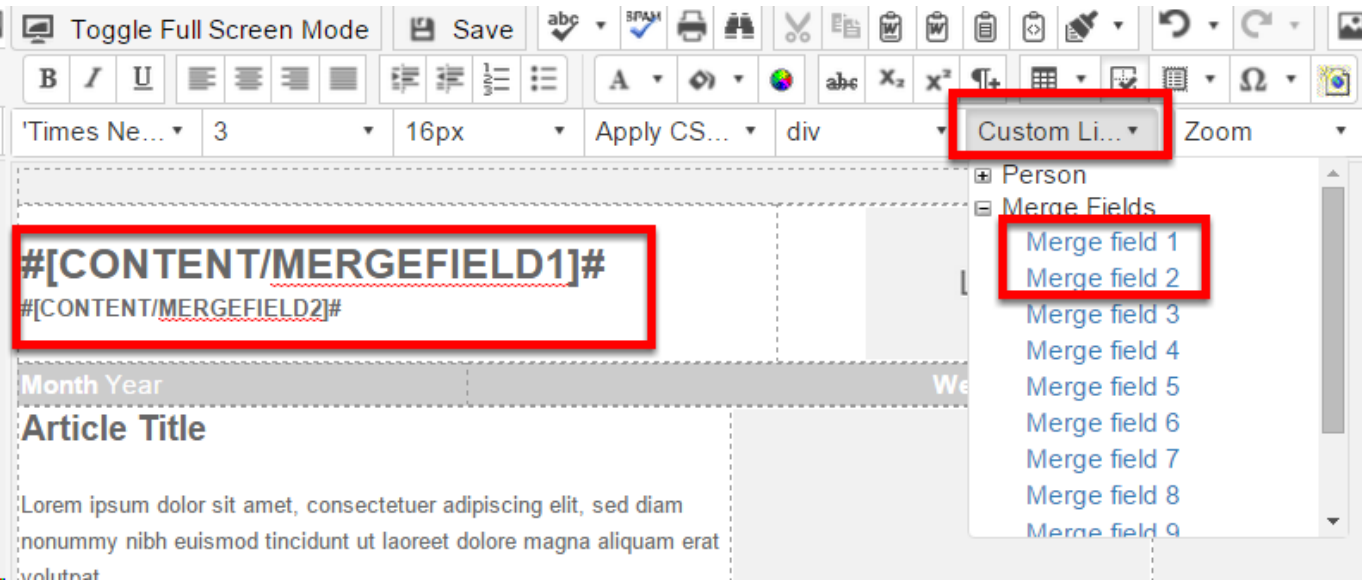
1. That the other campaign has its campaign type set to "follow up"
2. That the campaign has been initiated

Campaigns

Page 23

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

DetailAudienceEmailLanding ZoneSurveyFollow UpMerge fieldsSend TestInbox Checker

Merge Fields

Enter values below which will be merged in the emails and landing zones attached to the campaign (providing merge fields have been used when creating the con

Merge field 1:

Merge field 2:

Merge field 3:

Merge field 4:

Merge field 5:

Merge field 6:

Merge field 7:

Merge field 8:

Merge field 9:

Merge field 10:

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 test emails of your campaign.

Sending a campaign test

Detail **Audience** **Email** **Landing Zone** **Survey** **Follow Up** **Merge fields** **Send Test** **Inbox Checker**

Test Audience Type

Please select whether to send a test to an individual or a group...

1 • Individual ○ Group

Individual Options

First, select a person to mimic by clicking on one of the buttons beside "Contact Email".
Quick Select = Fast method for selecting a contact.
Audience Select = Selects a contact from your audience only.
In either option select a contact from the list shown. The "Contact" selected will NOT get the test.
Second, select or enter an email address in "Send Test To".

Contact: support@communicator.co.uk Quick Select... 2

Send Test To: 3

General Options

4 ○ Both (HTML and Text) • HTML Email ○ Text Email

Prefix subject with 'Preview:': ☐ 5

Send Test

6 7 8 9

Send Test View All Test Results View In Browser Check Spam Score

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 if 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

Welcome to the campaign initiate check screen. Please review all the details shown and when ready proceed with the initiation. Some checks are only notes or warnings, and you are still allowed to initiate. However some are stop errors and must be resolved before the campaign can be initiated. Hover your mouse over the check for more detail.

Check Campaign

The Campaign shows a warning

⌵

⚠

Check Landing Zone(s)

The Landing Zone/s is set up correctly

⌵

✔

Post Campaign Tracking

Post Campaign Tracking is set up correctly

⌵

✔

Campaign Audience

Campaign Group: Charlotte SSL Testing

Audience Total: 6 Count Audience ℹ

Check Email(s)

The Email/s is set up correctly

⌵

✔

Are you sure you want to initiate your campaign?

☐ Yes please, initiate my campaign!

☒ No not yet, please take me back to the campaign screen.

☐ Don't initiate, let me leave comments on this campaign.

Back to campaigns

1. Check Campaign

Check Campaign
The Campaign shows a warning



- 1 Campaign Name: GatorExpress Webinar
- 2 Campaign Type: Email Static Normal
- 3 Campaign Dates: Campaign is live between 19/08/2015 11:09:00 and 19/09/2015 11:09:00
- 4 Campaign Email Alias: support@communigator.co.uk
- 5 Sender Address: Support@supporttesting.geml1.co.uk
- 6 Reply Address: support@communigator.co.uk
- 7 Unsubscribe Name: Charlotte SSL Testing
Warning: Unsubscribe settings do not match the Send to a Friend settings
- 8 Send to a Friend: Charlotte SSL Testing
- 9 Send HTML Test: Html Test Email Sent
- 10 Send Text Test: Text Test Email Sent
- 11 Inbox Checker: No Inbox Check ran
Warning: You have not run an Inbox Check
- 12 Follow Up: This campaign has 1 Follow Up/s

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

Check Landing Zone(s)
The Landing Zone/s is set up correctly



Landing Zone Name: Charlotte SSL Testing

1

Has Unsubscribe Link: No

2

Landing Zone Index: 1

3

Has HTML Content: Yes

4

Has HTML Test Links: No

5

Has HTML Tracked Links: No

6

Has Non-Tracked Links: No

7

Requires Authentication: No

8

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

Post Campaign Tracking
Post Campaign Tracking is set up correctly

⬆



1

Google Analytics: All of your tracked links in your creatives have Google Analytics enabled.

Is GatorLeads Enabled: GatorLeads is enabled for this Campaign

2

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

Campaign Audience

Campaign Group: Charlotte SSL Testing

Audience Total: 6 Count 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)

Check Email(s)
The Email/s is set up correctly



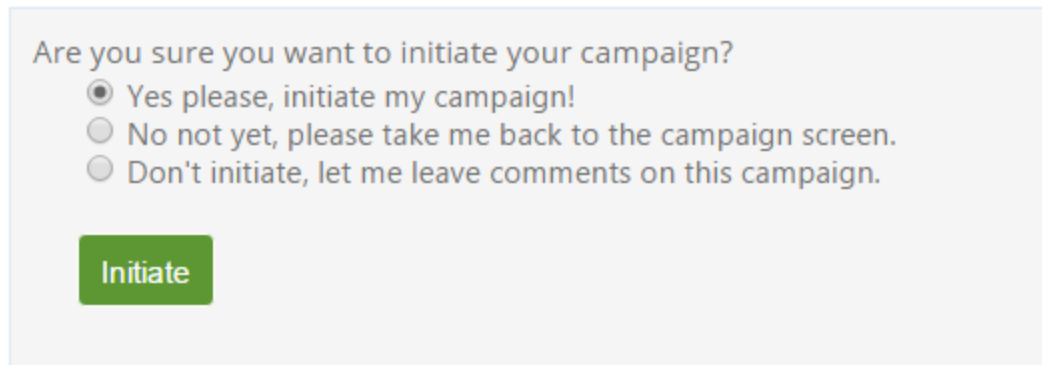
- 1 Email Name: Gator Design
- 2 Email subject: Webinar
- 3 Has HTML Content: Yes
- 4 Has Text Content: Yes
- 5 Has HTML Unsubscribe Link: Yes
- 6 Has HTML Survey Link(s): No
- 7 Has HTML Send to a Friend Link(s): Yes
- 8 Has HTML Test Links: No
- 9 Has HTML Tracked Links: No
- 10 Has HTML Non-Tracked Links: No
- 11 Email Contains Articles: Yes
- 12 Has Text Unsubscribe Link: Yes
- 13 Has Text Survey Link(s): No
- 14 Has Text to a Friend Link(s): Yes
- 15 Has Text Test Links: No
- 16 Has Text Non-Tracked Links: No

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



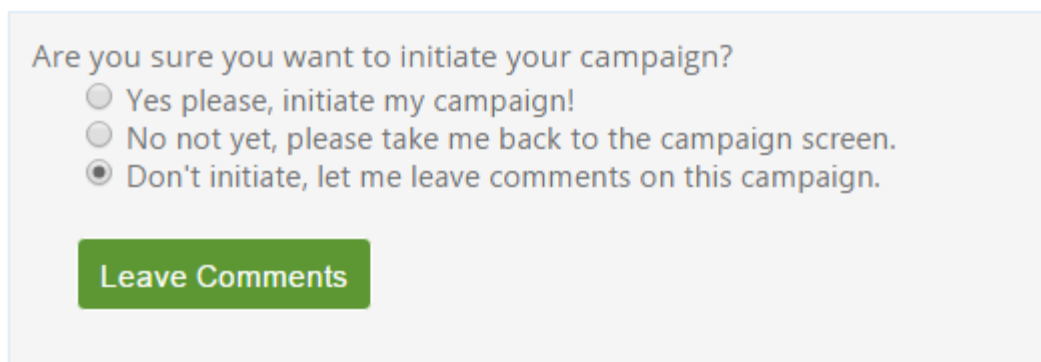
Are you sure you want to initiate your campaign?

- ☒ Yes please, initiate my campaign!
- ☐ No not yet, please take me back to the campaign screen.
- ☐ Don't initiate, let me leave comments on this campaign.

Initiate

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



Are you sure you want to initiate your campaign?

- ☐ Yes please, initiate my campaign!
- ☐ No not yet, please take me back to the campaign screen.
- ☒ Don't initiate, let me leave comments on this campaign.

Leave 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

The screenshot shows the 'Inbox Checker' tab within a campaign management interface. At the top, there is a navigation bar with links like Home, Recent, Calendar, Campaigns, Creative, Events, Audience, Templates, Tools, Reporting, and Admin. Below this is a sub-navigation bar with tabs: Detail, Audience, Email, Landing Zone, Survey, Follow Up, Merge fields, Send Test, and Inbox Checker. The 'Inbox Checker' tab is active. On the left, there is a green button labeled 'Initiate an Inbox Check' with a red circle '1' next to it. Below this is a section titled 'Inbox Checker Results'. It contains a table with columns: Date Initiated, Date Completed, Email Results, Spam Filter Results, Associated Contact, and Current State. Above the table, there are red circles '2' through '7' pointing to specific parts of the table headers. To the right of the table is a 'Refresh' button with a red circle '8' next to it. Below the table, a message states: 'No Inbox Checks have been created for the current campaign.'

Date Initiated	Date Completed	Email Results	Spam Filter Results	Associated Contact	Current State
No Inbox Checks have been created for the current campaign.					

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

Initiate an Inbox Check

Inbox Checker Results

	2	3	4	5	6		8
1	Date Initiated	Date Completed	Email Results	Spam Filter Results	Associated Contact	Current State	Refresh
Html Inbox Check initiated on 24/08/2015 15:42:11 (Last one ran before the campaign was initiated)	24/08/2015 15:42:11	24/08/2015 16:43:36	45 of 47	13 of 13			

- Once the inbox checker 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

Initiate an Inbox Check

Inbox Checker Results

Back to results

Refresh Results

Results Link

Html Inbox Check initiated on 24/08/2015 15:42:11

Email Screen Shots

Spam Filter Scores

Subject Line Screen Shots

Android 4.2

AOL Mail (Chrome)

AOL Mail (Explorer)

AOL Mail (Firefox)

Apple Mail 7

Apple Mail 8

BlackBerry 4 OS

BlackBerry 5 OS

Color Blindness

Gmail (Chrome)

Gmail (Explorer)

Gmail (Firefox)

Gmail App (Android)

Google Apps (Chrome)

Google Apps (Explorer)

Google Apps (Firefox)

IBM Notes 9

iPad (Retina)

iPad Mini

iPhone 5s (iOS 7)

iPhone 5s (iOS 8)

iPhone 6

iPhone 6 Plus

Lotus Notes 7

Lotus Notes 8

Lotus Notes 8.5

Office 365 (Chrome)

Office 365 (Explorer)

Office 365 (Firefox)

Outlook 2000

Outlook 2002

Outlook 2003

Outlook 2007

Outlook 2010

Outlook 2011

Outlook 2013

Outlook 2013 120 DPI

Outlook 2016

Outlook.com (Chrome)

Outlook.com (Explorer)

Outlook.com (Firefox)

Plain Text

Thunderbird 38.2

Windows Phone 8

Yahoo! Mail (Chrome)

Yahoo! Mail (Explorer)

Yahoo! Mail (Firefox)

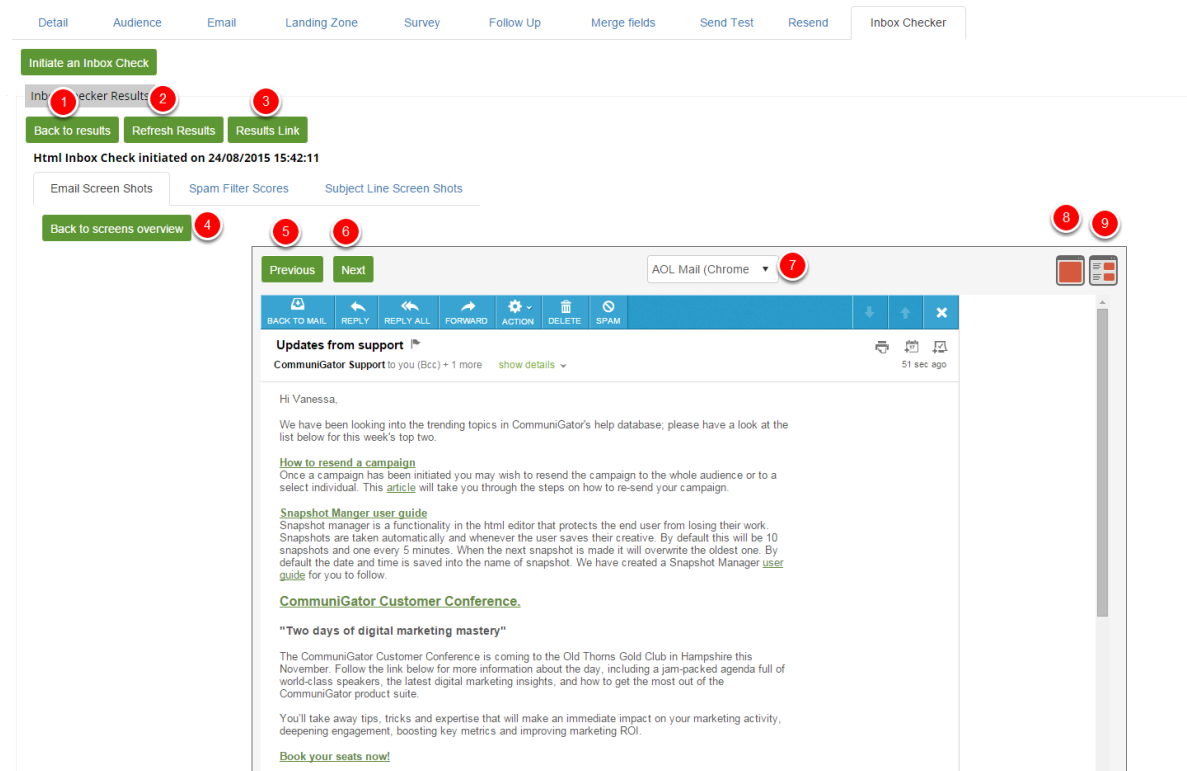
When clicking on the name of the inbox checker it will take you through to the Email Screen shots which allows you to view what your email looks like in 41 different email clients.

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)

Campaigns

Page 35

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

Html Inbox Check initiated on 24/08/2015 15:42:11

Email Screen Shots

Spam Filter Scores

Subject Line Screen Shots

MessageLabs

Failed

MessageLabs is an expensive corporate server-side spam filter. It is in use by many large organisations and is very regularly updated.

Outlook

Passed

The built-in junk e-mail filter for Outlook, which ships as part of Microsoft Office. This has various sensitivity settings, here we have set it to 'High'.

AOL Mail

Passed

The filter offered as part of AOL's mail service. Recipients can aid delivery by adding the sender's email address to their address book. That's not been done here, so this represents a more pessimistic spam scoring.

Barracuda

Passed

- Your email contains HTML content. This won't usually cause you to fail any spam filters.

Barracuda Spam Firewall is an expensive hardware spam filter that is installed by large organisations within their own datacentres.

Yahoo! Mail

Passed

The filter offered as part of Yahoo's mail service. Recipients can aid delivery by adding the sender's email address to their address book. That's not been done here, so this represents a more pessimistic spam scoring.

DKIM

Passed

DomainKeys Identified Mail (DKIM) is a method for associating a domain name to an email, thereby allowing an organization to take responsibility for a message in a way that can be validated

SpamAssassin

Passed

- Your email contains a URL blacklisted by [William Stearns](#).

A very popular open source spam filter. Here we are testing against version 3.3, using its default settings.

Gmail

Passed

The filter offered as part of Google's Gmail service. Recipients can aid delivery by adding the sender's email address to their address book. That's not been done here, so this represents a more pessimistic spam scoring.

Sender Policy Framework

Passed

Sender Policy Framework (SPF) is an e-mail sending validation system designed to prevent e-mail spam by confirming the sender is permitted to send via their host. SPF allows administrators to specify which hosts are allowed to send e-mail

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

Html Inbox Check initiated on 24/08/2015 15:42:11

Email Screen Shots

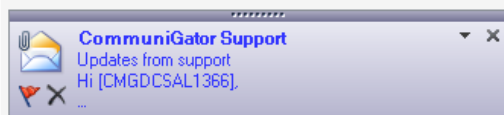
Spam Filter Scores

Subject Line Screen Shots

Outlook 2007 Notification Pop-up



Outlook 2010 Notification Pop-up



Outlook 2013 Notification Pop-up



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 marketers 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.

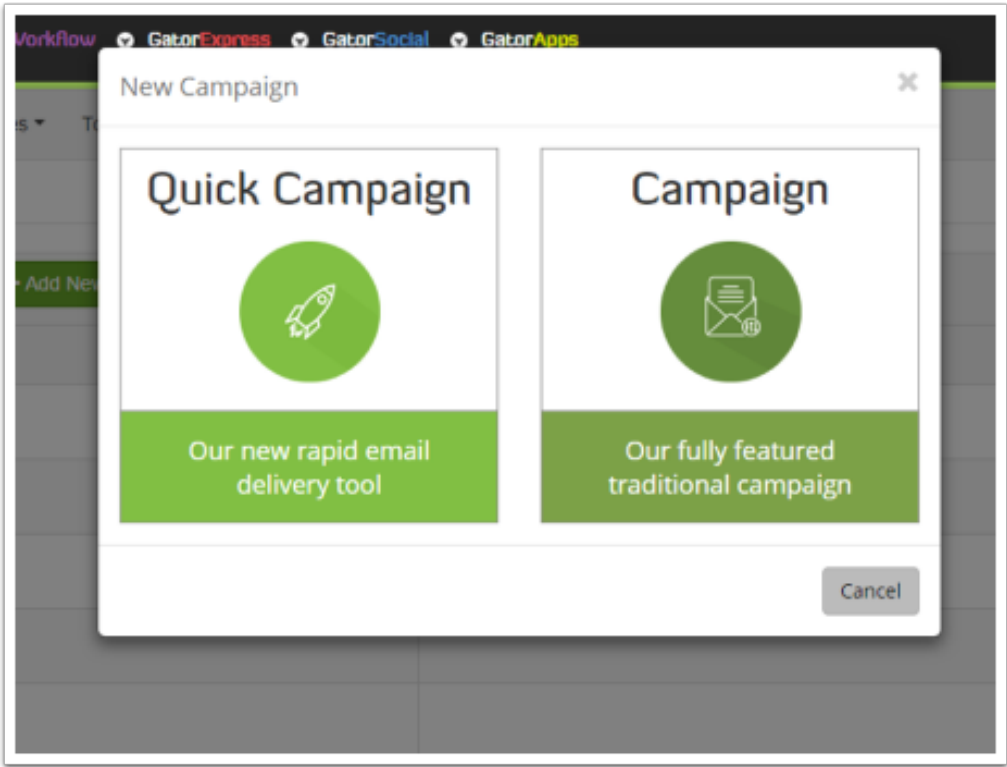
Quick Campaign: user guide

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



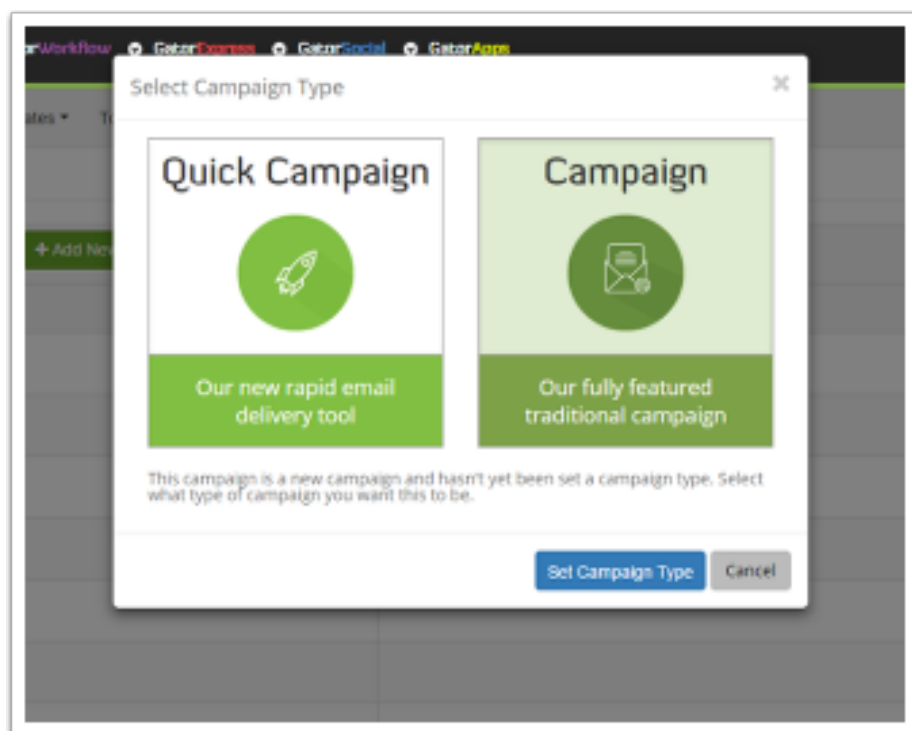
Campaign select grid

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

Created			Status	Action	
28 April 2017 02:26 PM				<button>Initiate</button>	
28 April 2017 12:28 PM				<button>Initiate</button>	
28 April 2017 11:13 AM				<button>Initiate</button>	

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 highlighted 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.

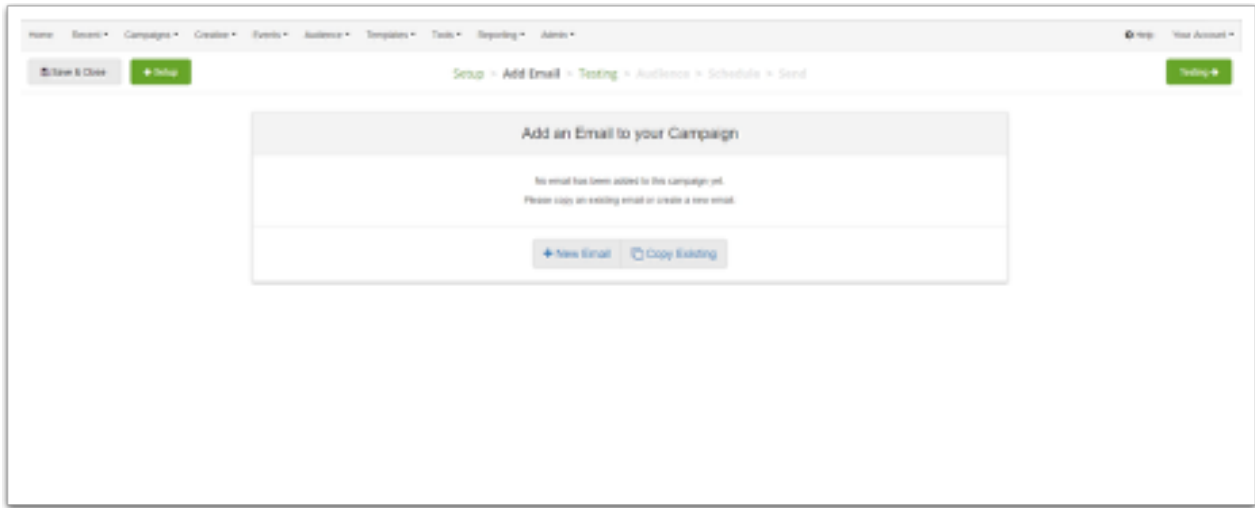
Sender Details

- 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

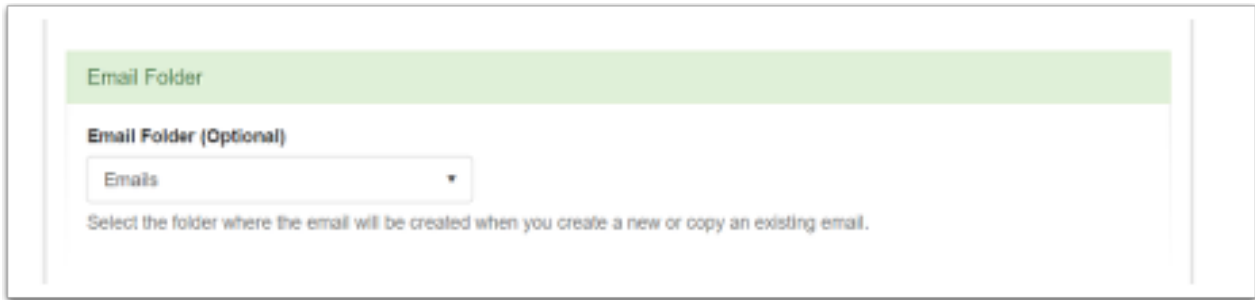
When the user navigates to this page for the first time they have the following options.

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".

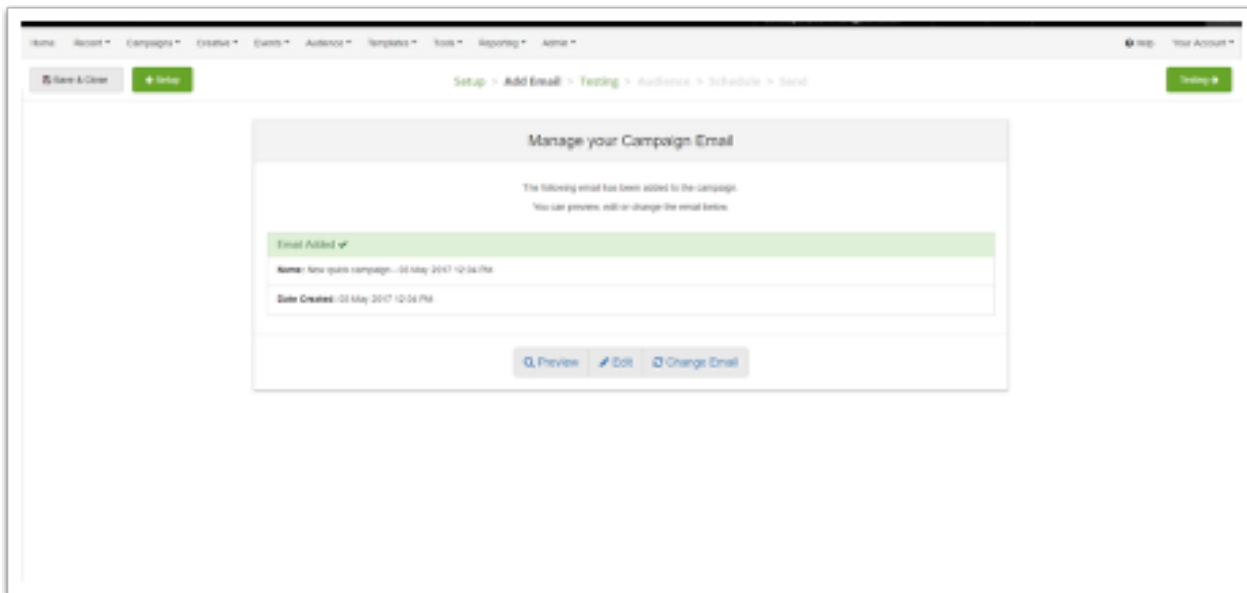


You cannot continue in the wizard until an email has been added to the campaign. If you try to continue you will be shown a validation message.

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.



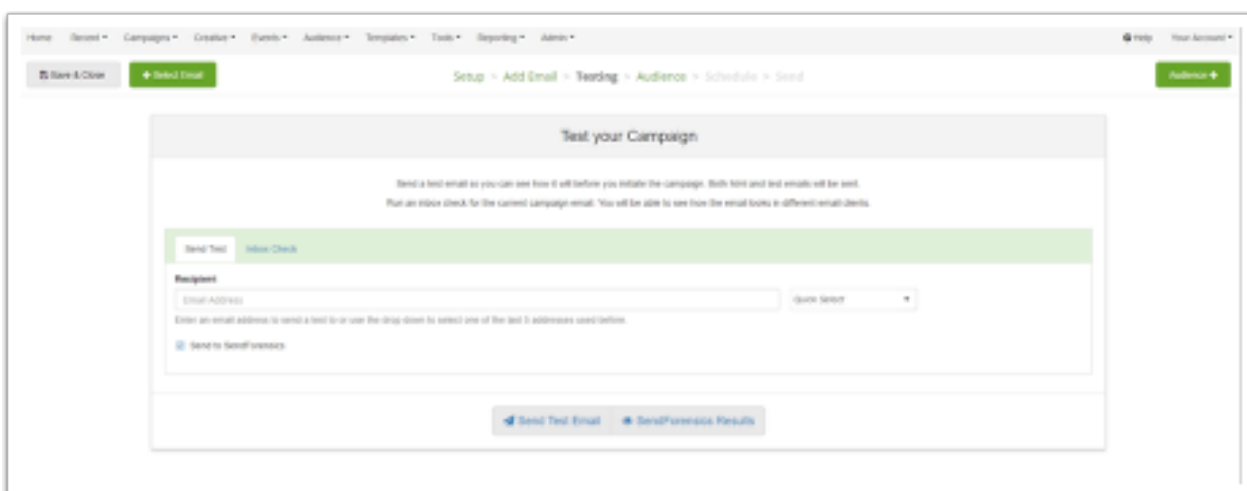
1. Preview Shows the preview modal of the email.
2. Edit The user can edit the email.
3. Change Email The user can change the email. When selected, they will be given the following options
 1. Cancel Cancel changing of the email and go back to the manage email page.
 2. New email Create a new email
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



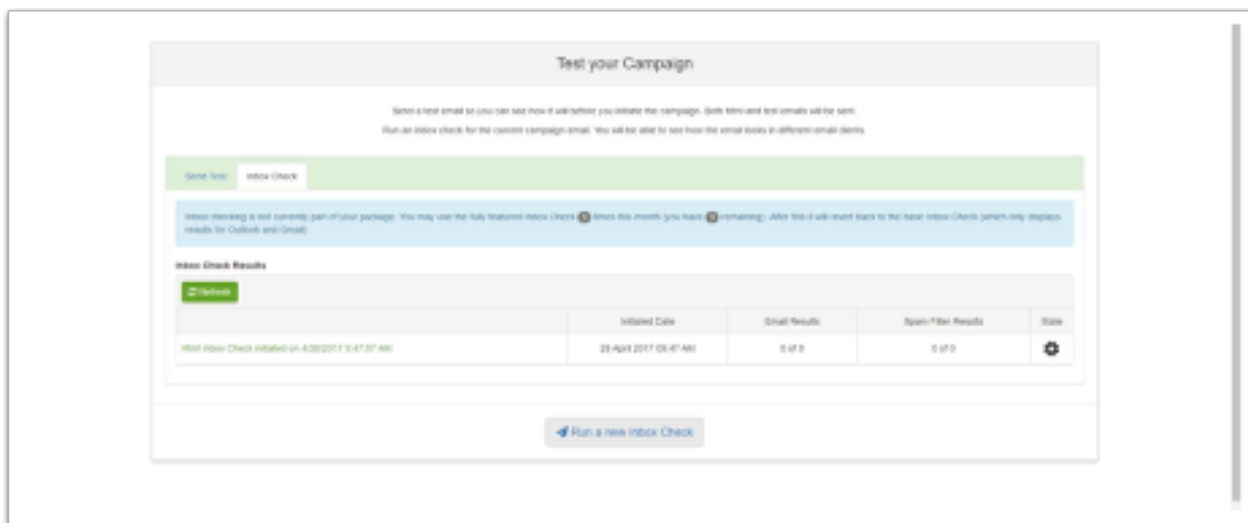
To send a test enter a name in the recipient text box and click on send test. Both html and text versions of the email will be sent.

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.

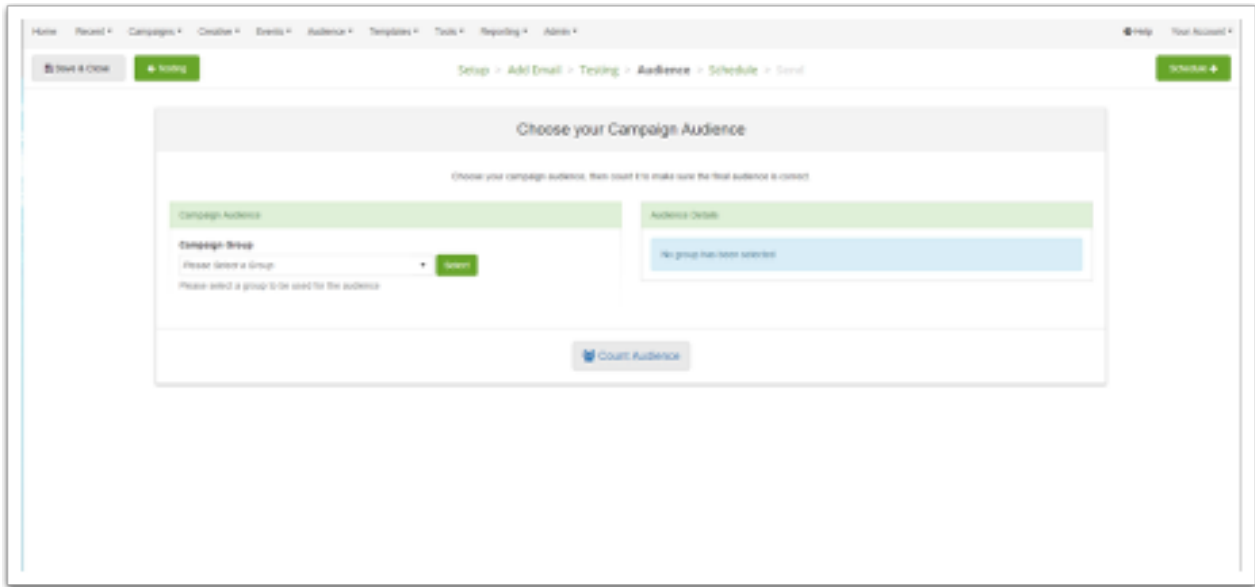


When an inbox check has been initiated there is a time limit until you can initiate another inbox check. This was a feature added recently to the advanced campaign screen as well.

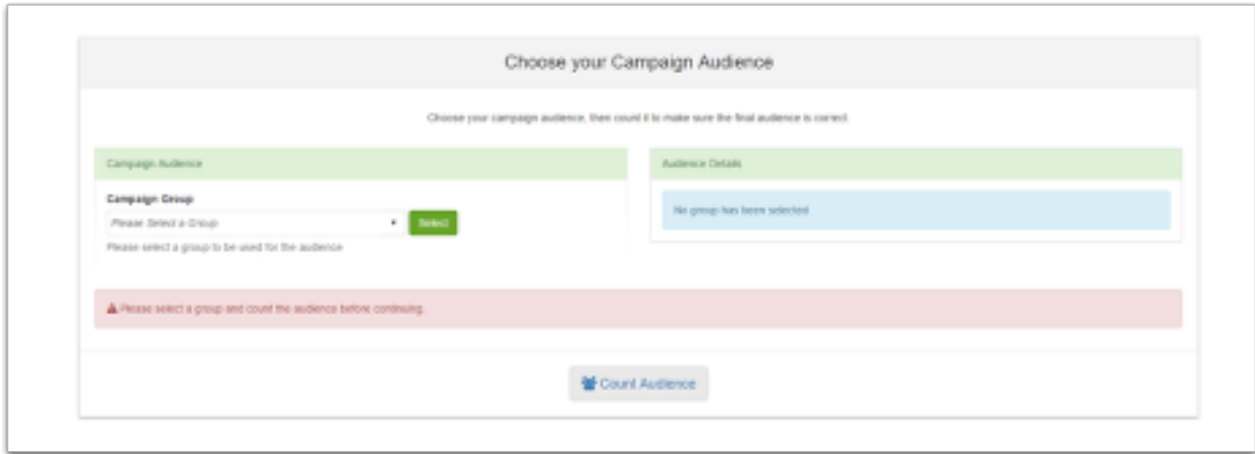
The difference of this inbox compared to the advanced campaign screen is that each inbox check is ran against the campaign email. If the user changes the campaign email no inbox check results will show until an inbox check has been initiated again.

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.

Choose your Campaign Audience

Choose your campaign audience, then count it to make sure the final audience is correct.

Campaign Audience

Campaign Group

Default Unsubscribe Group

Select

Please select a group to be used for the audience

Audience Details

Last Count Date / Time

03 May 2017 01:51 PM

Audience

0

Unsubscribes / Opt-Out

0

Undeliverables

0

Duplicates

0

Final Audience

0

This campaign has a static Action Type. This means your Final Audience must contain at least one audience member.

Count Audience

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.

Choose your Campaign Audience

Choose your campaign audience, then count it to make sure the final audience is correct.

Select

Audience Details

Last Count Date / Time

03 May 2017 01:55 PM

Audience

0

Unsubscribes / Opt-Out

0

Undeliverables

0

Duplicates

0

Final Audience

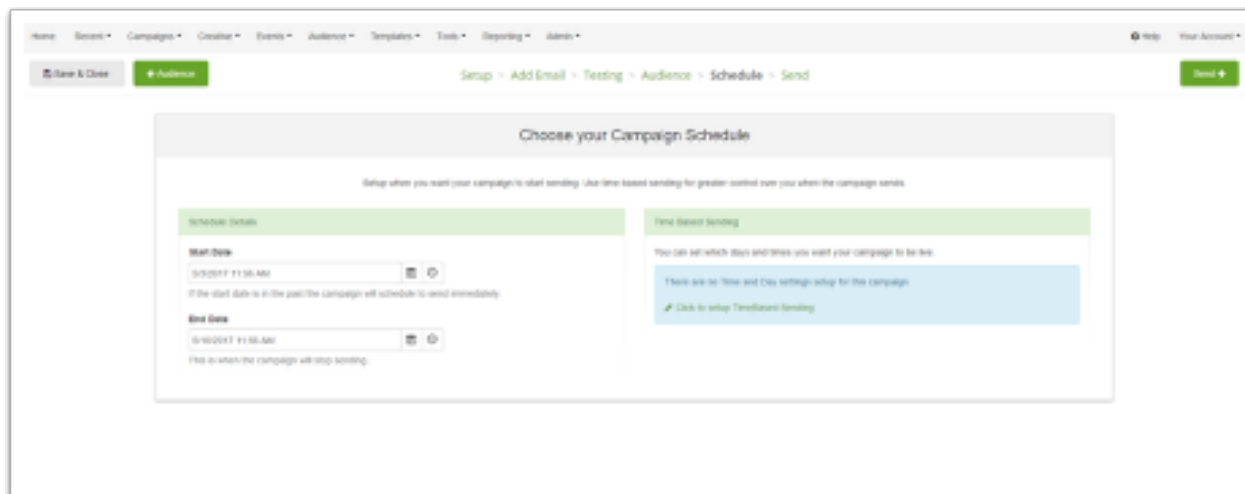
0

Count Audience

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 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.

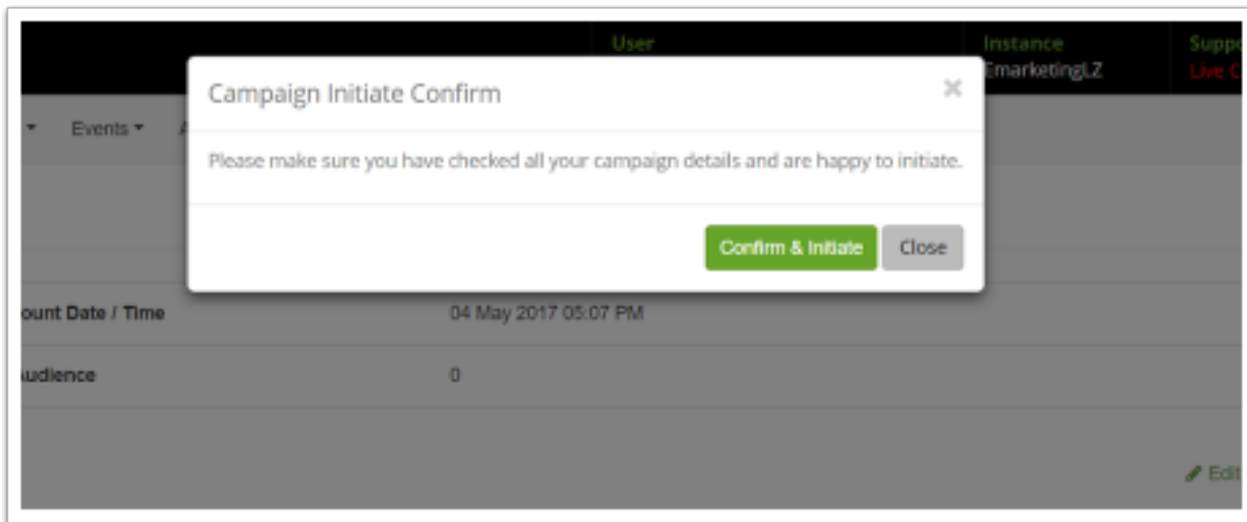
Schedule [Edit Schedule](#)

✓	Start Date	29 January 2017 11:56 AM
✓	End Date	07 April 2017 11:56 AM
✓	Time Based Sending	Time Based Sending is enabled. The campaign will only send during these periods. View Times

Day	Start	End
Everyday	09:30	18:00

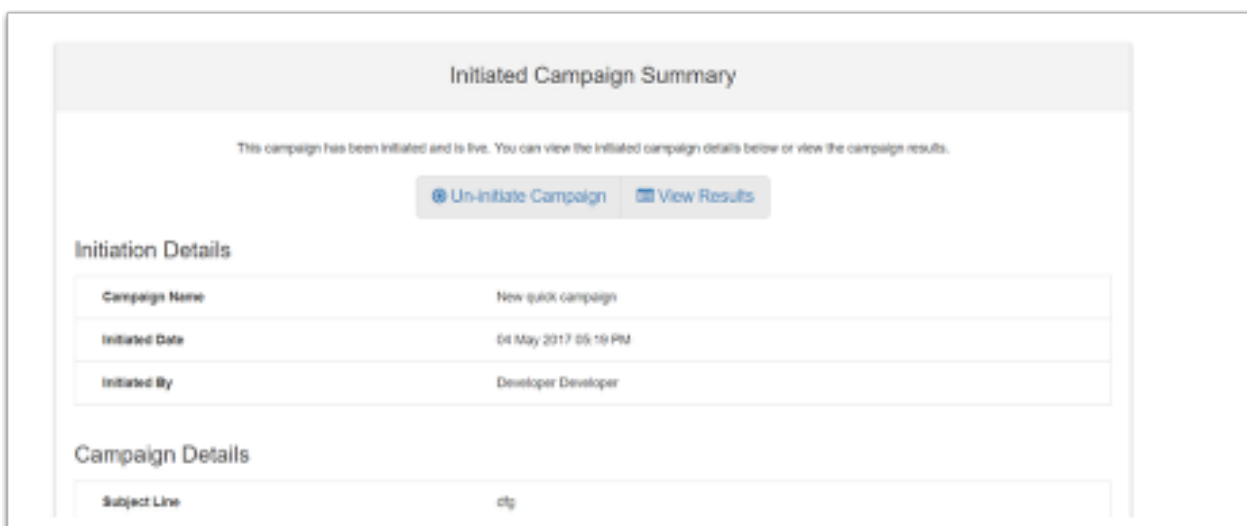
Initiate

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)

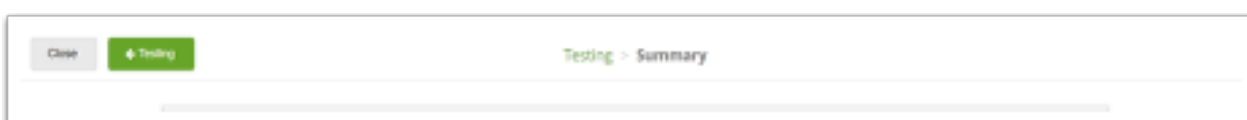
When the campaign has been initiated you can no longer edit the campaign. When you view the campaign via the campaign select grid you will be taken to the Initiated Campaign Summary page. This displays the summary details of the campaign.



You have the following options.

1. Un-initiate - If the campaign has not started to send then you can un-initiate 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

CampaignsCreativeEventsAudienceTemplatesToolsReportingHelpYour Account

1

Campaign Selection

New CampaignNew Gator ExpressFilter/SearchClear Filter/Search

ABCDEFGHIJKLMNOPQRSTUVWXYZ*

☐	Name	Notes	Created		Status	Action	
☐	Support Friday Send 18.09.15 Bad Data		09/09/2015 13:12:19			2View Results	
☐	Support Friday Send 18.09.15 Good Data		09/09/2015 13:06:50			View Results	
☐	Support Friday Send 04.09.15 Bad Data		03/09/2015 14:35:31			View Results	
☐	Support Friday Send 04.09.15 Good Data		03/09/2015 14:33:00			View Results	

- 1. Campaign Tabs
- 2. View Results

Top Bar

749Sent1

734Delivered2

254Opens3

32Clicks4

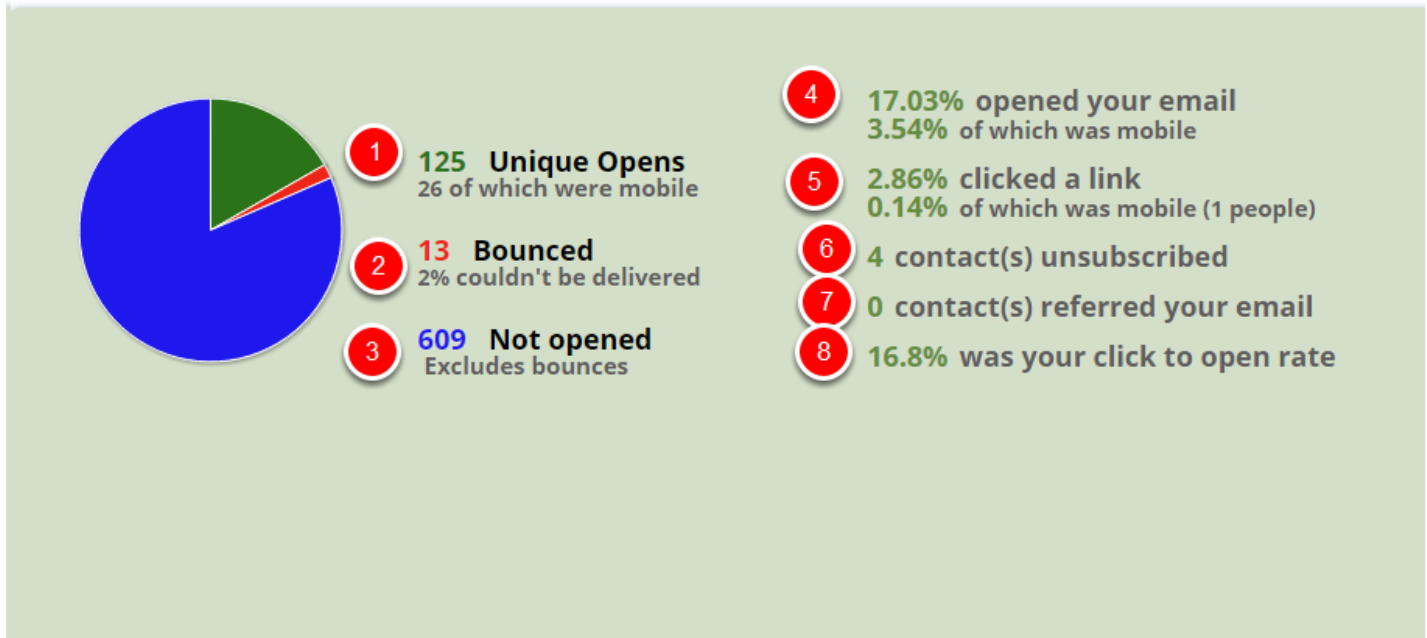
0Social5

6

- 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



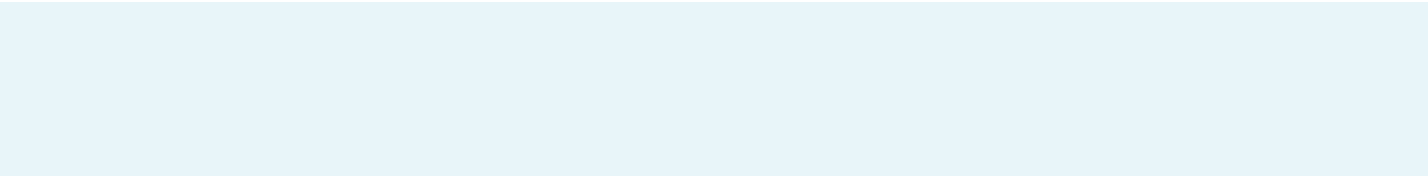
1. How many unique opens of your email, (individual email addresses and not how many times opened)
2. How many of your emails bounced - this includes hard, soft and other bounces
3. How many of your emails not opened, this counts for unique opens
4. Overall percentage of emails opened, including mobile 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	Initial Send:	749
	Follow Ups:	0
	Triggered:	0
	Unique User Sent:	749
	Undelivered:	15
	Failed:	2
	Hard Bounces:	11
	Soft Bounces:	2
	Other Bounces:	0
	Unique User Undelivered:	15
	Unique User Delivered:	734
	Emails Not Opened:	609
	Unique User Not Opened:	609
	Landing Zone Clicks:	0
	Web Clicks:	32
	Survey Clicks:	0
	Calendar Appointments:	0
	Unique User Clicks:	21
	Complaints:	0
	Autoresponder:	0
	Email Rating:	0
	2	

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



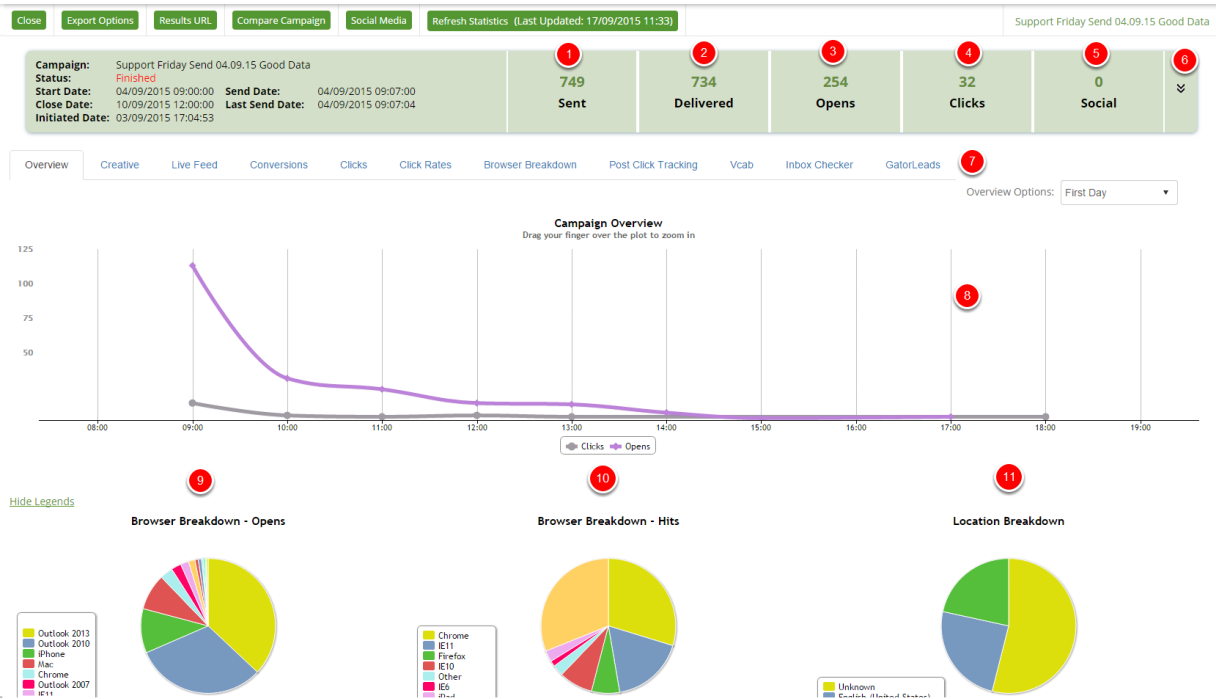
Select the results from the relevant campaign

New CampaignNew Gator ExpressFilter/SearchClear Filter/Search ABCDEFGHIJKLMNOPQRSTUVWXYZ*							
☐	Name	Notes	Created		Status	Action	
☐	Support Friday Send 18.09.15 Bad Data		09/09/2015 13:12:19			View Results	
☐	Support Friday Send 18.09.15 Good Data		09/09/2015 13:06:50			View Results	
☐	Support Friday Send 04.09.15 Bad Data		03/09/2015 14:35:31			View Results	
☐	Support Friday Send 04.09.15 Good Data		03/09/2015 14:33:00			View Results	

In CommuniGator click on the campaigns tab.

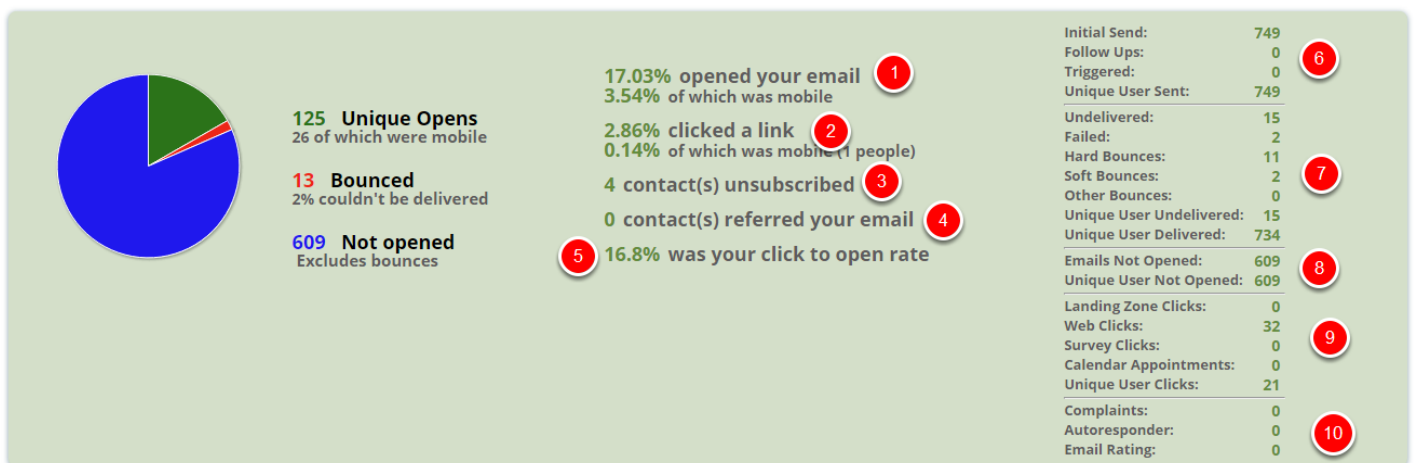
Once a campaign has been initiated the option that appears to the right hand side will change from "initiate" to "results" click this button to view the results screen.

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

New CampaignNew Gator ExpressFilter/SearchClear Filter/Search

ABCDEFGHIJKLMNOPQRSTUVWXYZ*

☐	Name	Notes	Created			Status	Action	
☐			09/09/2015 13:12:19				View Results	
☐			09/09/2015 13:06:50				View Results	
☐			03/09/2015 14:35:31		1		View Results	
☐			03/09/2015 14:33:00				View Results	
☐			24/08/2015 15:40:58				View Results	

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

Campaign:Support Friday Send 04.09.15 Good Data

Status:Finished

Start Date:04/09/2015 09:00:00

Close Date:10/09/2015 12:00:00

Initiated Date:03/09/2015 17:04:53

Send Date:04/09/2015 09:07:00

Last Send Date:04/09/2015 09:07:04

749

Sent

734

Delivered

254

Opens

32

Clicks

0

Social

Overview

Creative

Live Feed

Conversions

Clicks

Click Rates

Browser Breakdown

Post Click Tracking

Vcab

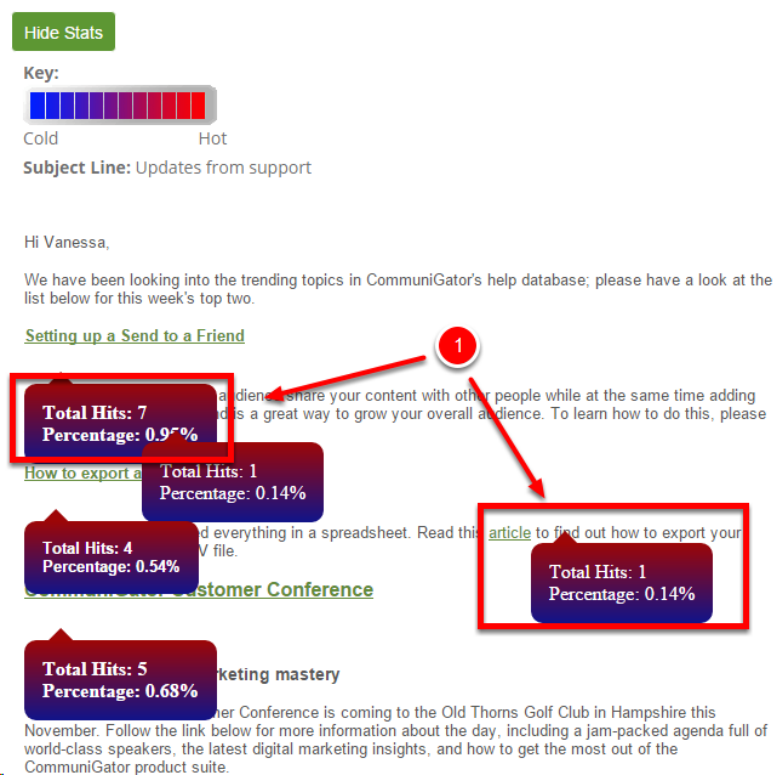
Inbox Checker

GatorLeads

You can click a link in your email to hide the stats bubble for that link. This is useful if the stat bubbles are overlapping each other

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

Close

Export Options

Results URL

Compare Campaign

Social Media

Refresh Statistics (Last Updated: 17/09/2015 11:33)

Campaign: Support Friday Send 04.09.15 Good Data			
Status: Finished			
Start Date: 04/09/2015 09:00:00	Send Date: 04/09/2015 09:07:00	749 Sent	734 Delivered
Close Date: 10/09/2015 12:00:00	Last Send Date: 04/09/2015 09:07:04		254 Opens
Initiated Date: 03/09/2015 17:04:53			

Overview

Creative

1

Live Feed

Conversions

Clicks

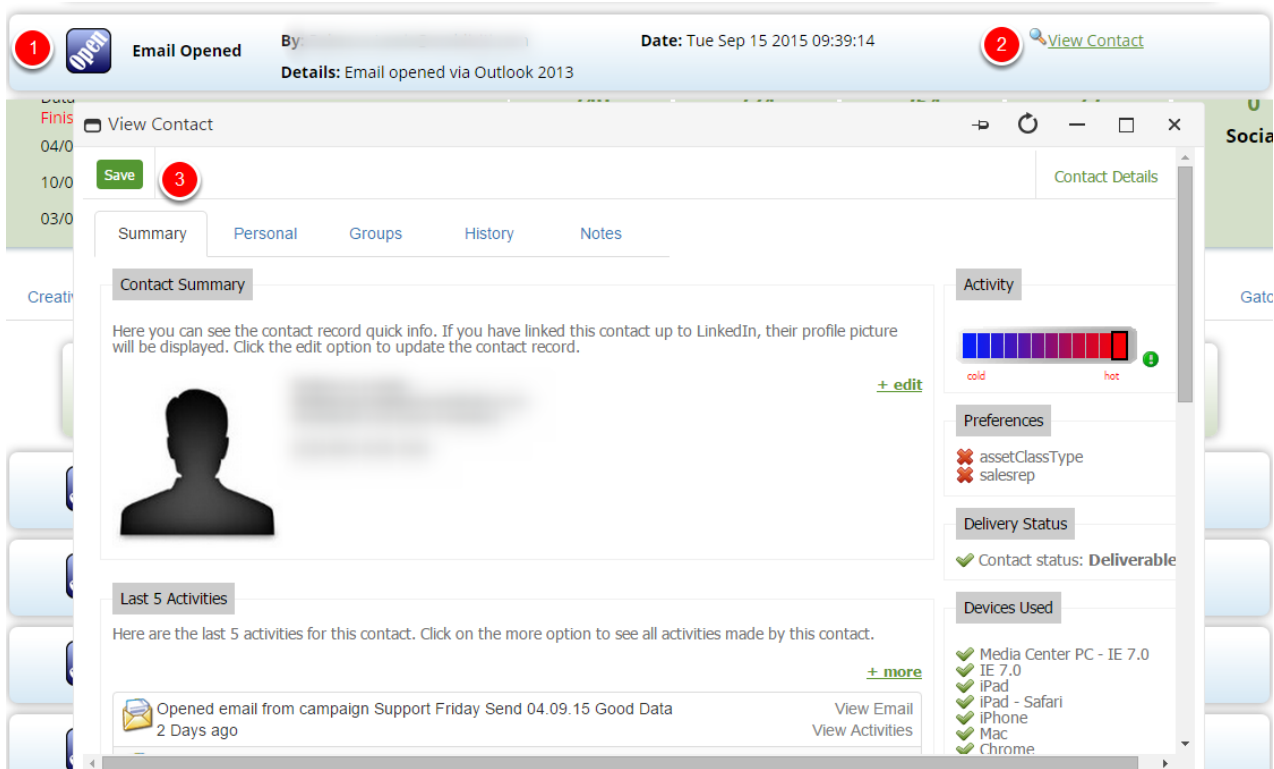
Click Rates

Browser Breakdown

Post Click Tracking

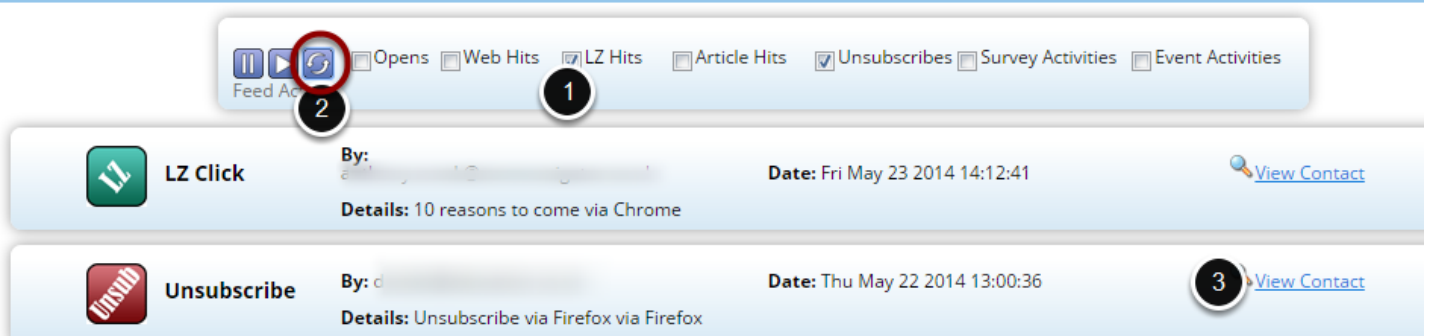
1. The live feed tab is located in the campaign results

Live Feed Overview



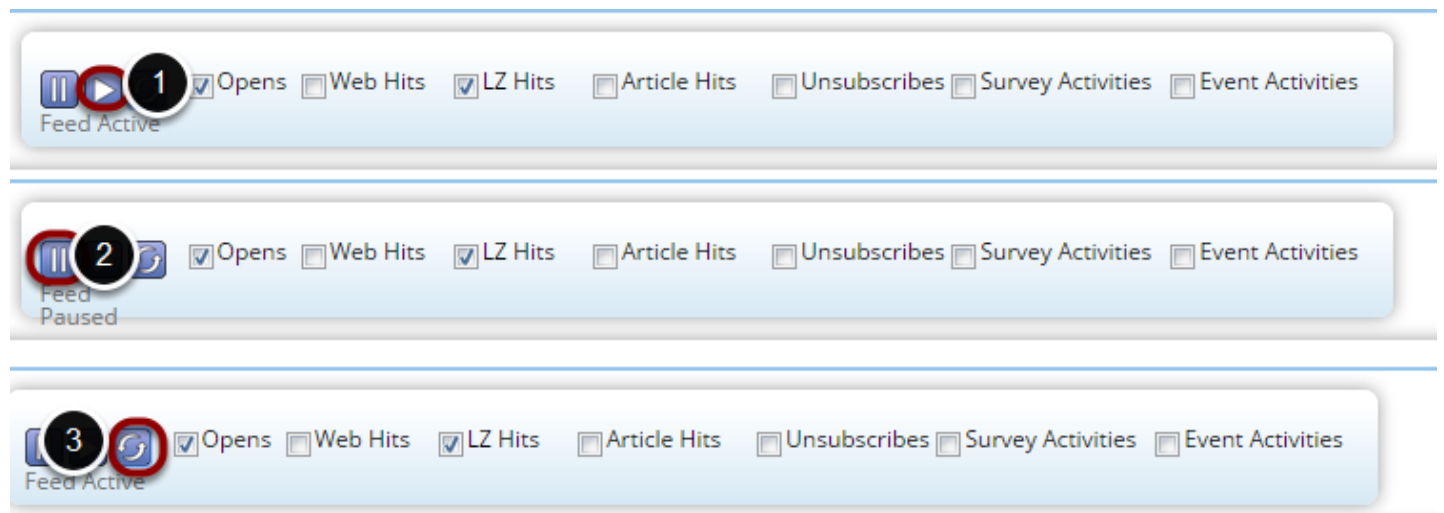
1. This is the live feed overview, which shows you statistic about your campaign, such as web clicks, opens or landing zone clicks.
2. If you want to view the contact on the live feed click here
3. This brings up the contact record, which takes you to the Summary page where you can view the contact summary.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

Specifying



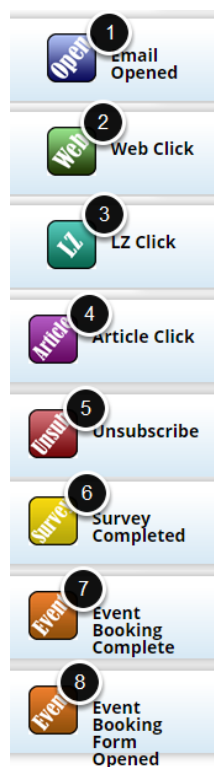
1. If you want to view specific results on the live feed, such as landing zone clicks and unsubscribes, select the preferences you would like.
2. Press the refresh buttons to view your results
3. View the contact record.

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

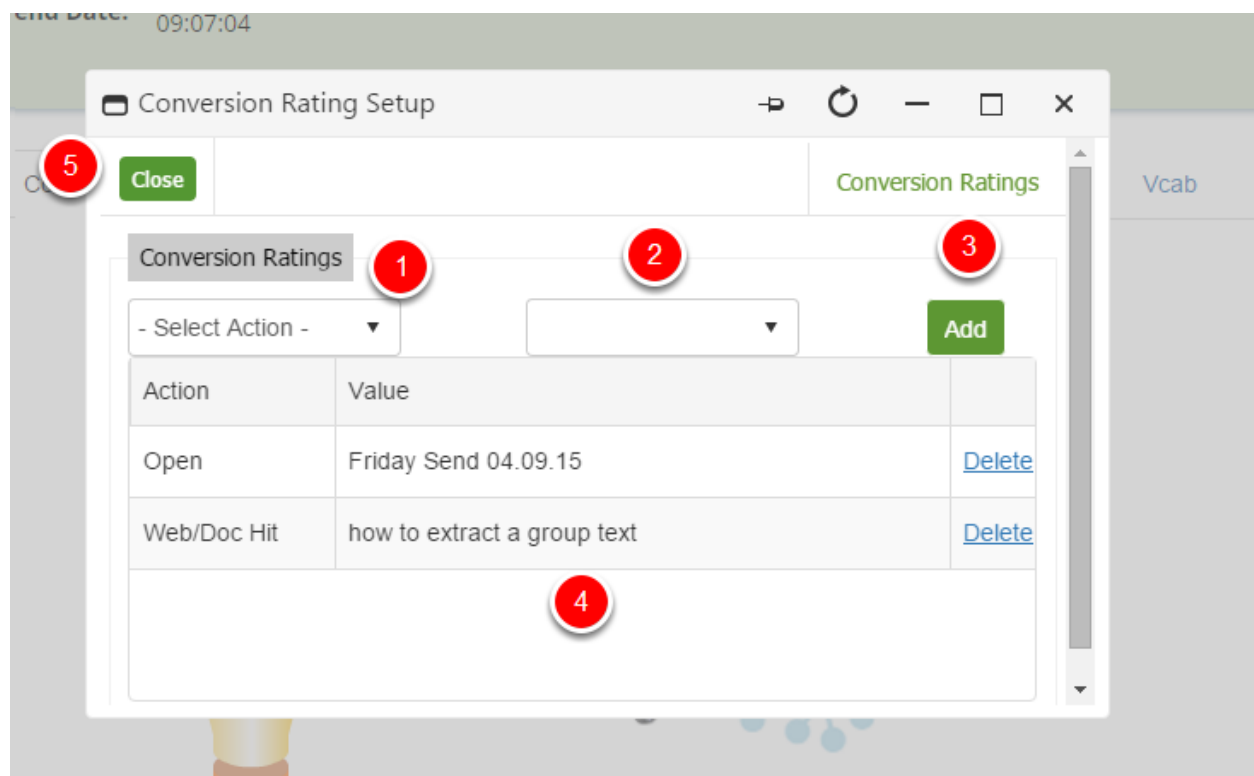
The conversions screen allows you to drill down into the results of a campaign. This powerful tool can have multiple rules to really get into the core of your audience. The standard setup for conversions is Sent -> Delivered -> Opens, but this can be customised to whatever matched your needs.

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.

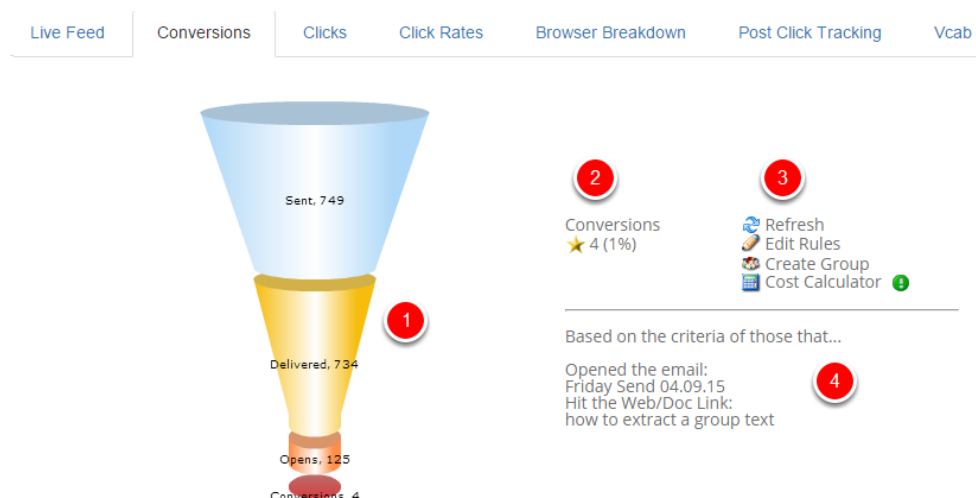
Campaign Conversions Screen 2



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.

Overview Creative Live Feed **Conversions 1** Clicks Click Rates Browser Breakdown Post Click Tracking Vcab Inbox Checker GatorLeads

Campaign Clicks

Please find below a list of all clicks for this campaign. To view the contacts that clicked each link please click the arrow icon alongside the link.

Alias 2	Link 3	Link Type 4	Total 5	Distinct 6	Distinct % 7
▶ how to extract a group	http://help.communicator.co.uk/m/31364/112353-how-to-extract-a-group-to-csv	Web	4	4	100.00
▶ how to extract a group text	http://help.communicator.co.uk/m/31364/112353-how-to-extract-a-group-to-csv	Web	1	1	100.00
▶ send to a friend	http://help.communicator.co.uk/m/31401/1138638-setting-up-a-send-to-a-friend	Web	7	4	57.14
▶ send to a friend text	http://help.communicator.co.uk/m/31401/1138638-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.communicator.co.uk/conference/register-your-interest/	Web	6	6	100.00
▶ customer conference	https://www.communicator.co.uk/conference/register-your-interest/?utm_source=Email+Signature&utm_medium=Email+Sig&utm_campaign=Conference+Link	Web	5	3	60.00

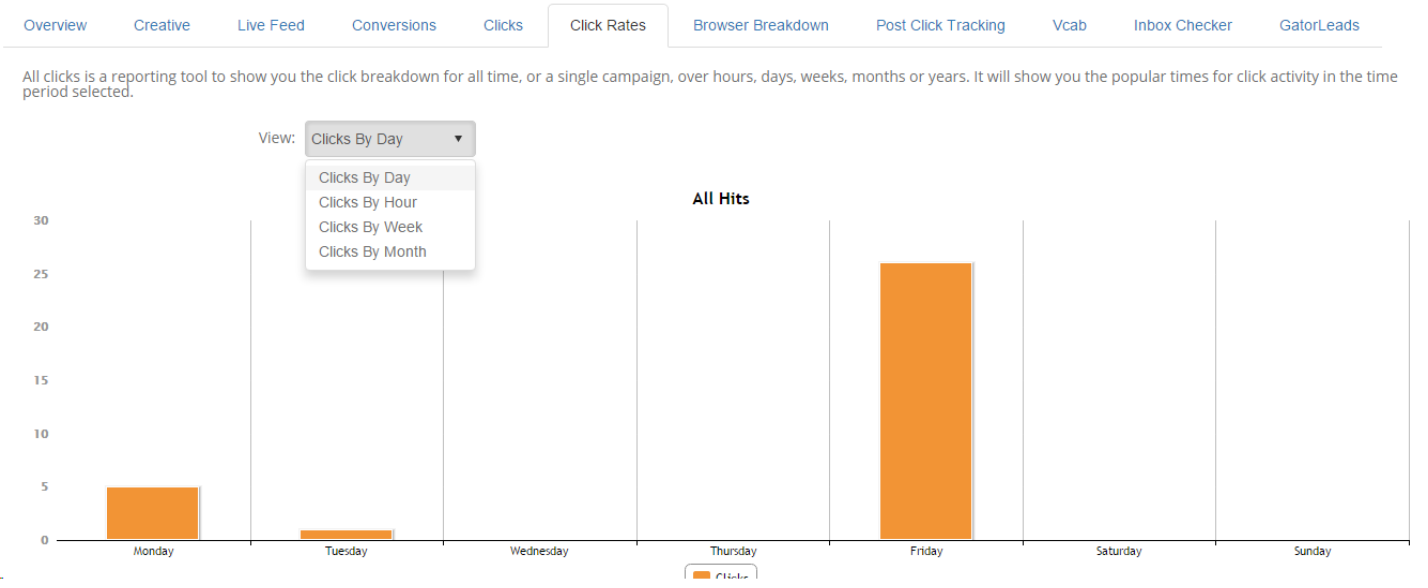
[Create a group of all the contacts who clicked through to the selected link 8](#)
[Display the Social Share results for the selected link 9](#)
[Export all contacts who clicked on link 10](#)
[Export distinct web clicks \(21\) 11](#)

1. Clicks Tab
2. The Alias 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



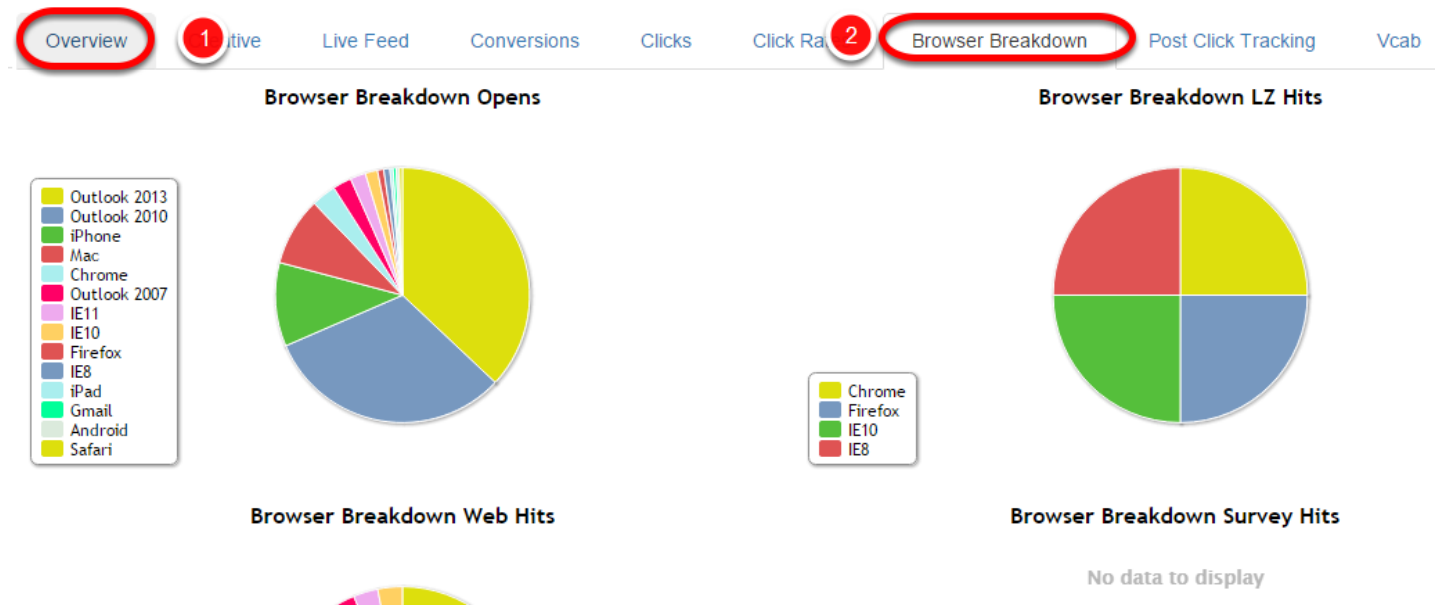
You can view the click rates of the campaign with the following views:

- 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.

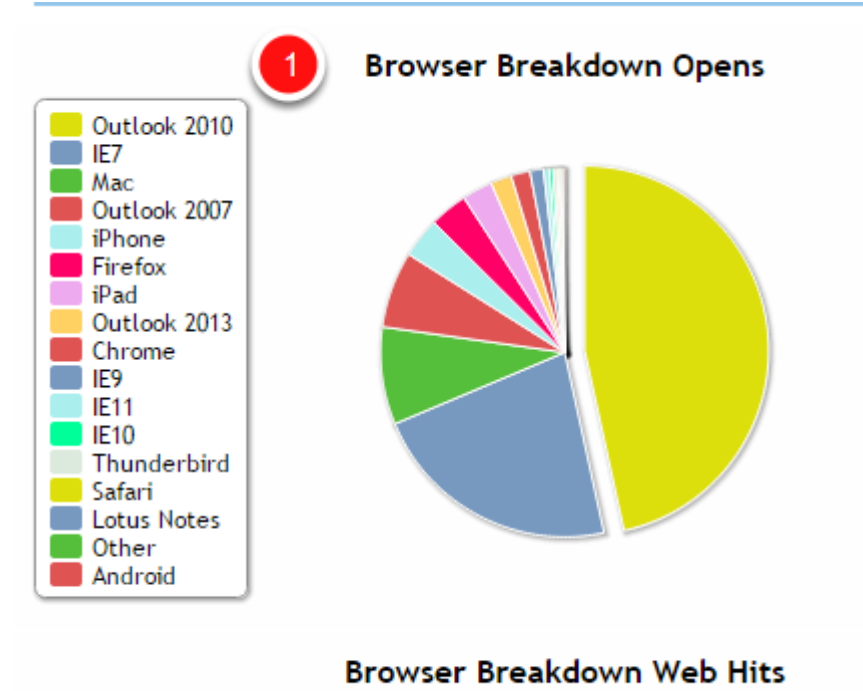
Accessing Browser Breakdown



There are two ways of viewing browser breakdown.

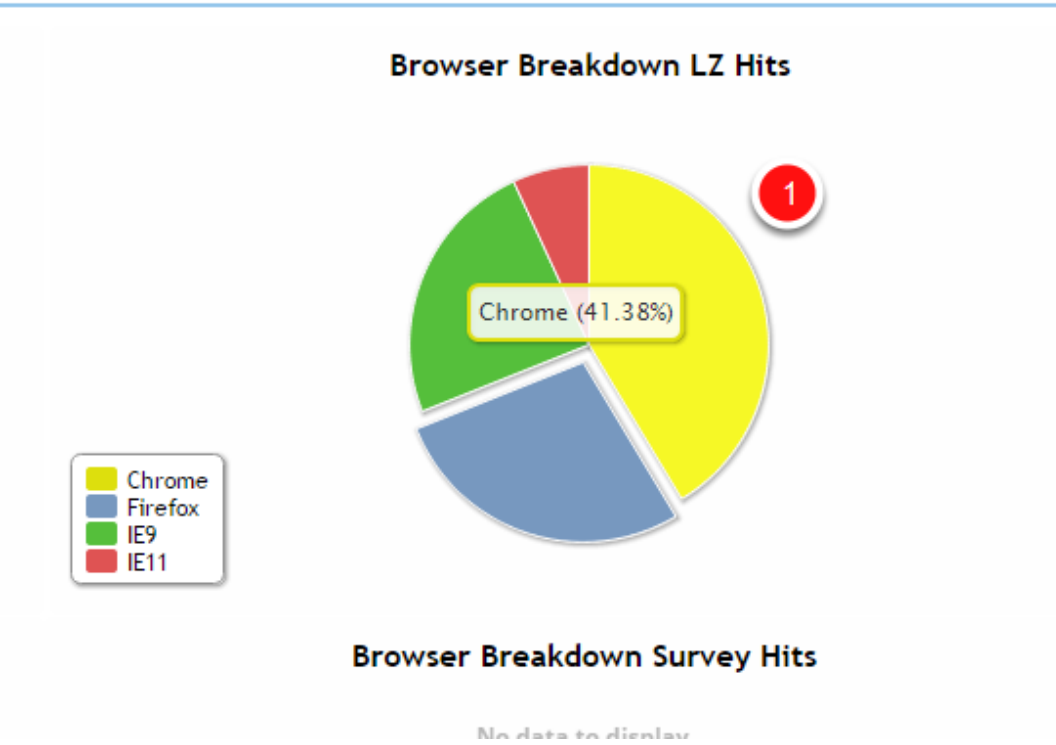
1. Overview Tab
2. Browser Breakdown Tab

Opens



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

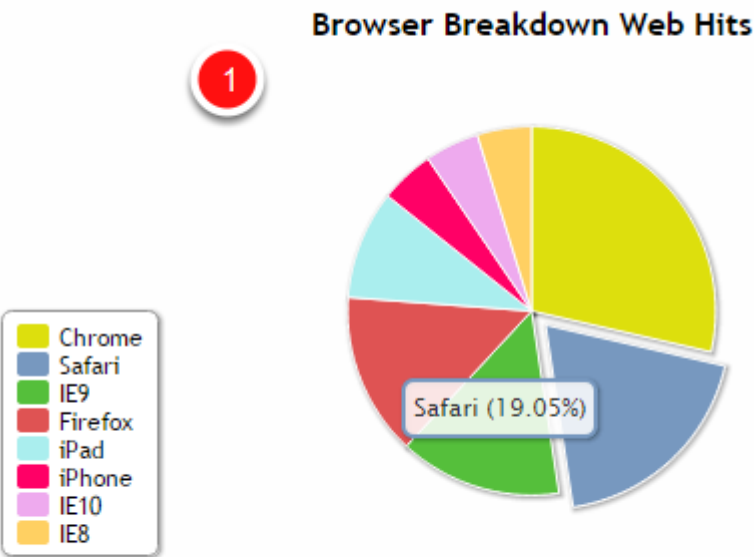
Landing Zone Hits



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

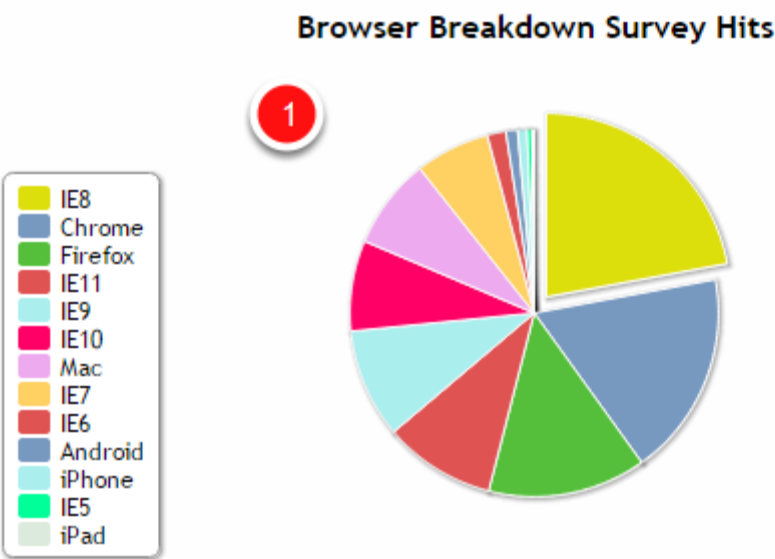
Note: hovering over the section tells you the browser and the percentage, as in the example above.

Web Hits



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

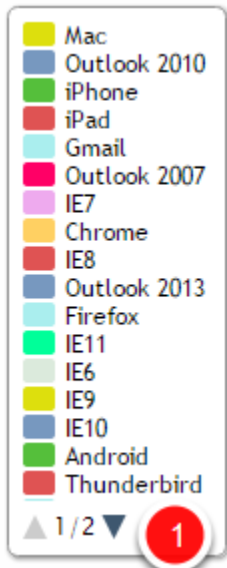
Survey Hits



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

[Close](#) [Export Options](#) [Results URL](#) [Compare Campaign](#) [Social Media](#) [Refresh Statistics](#) (Last Updated: 31/03/2015 14:24) [VCAB Results](#)

Campaign: VCAB Results
Status: Live
Start Date: 31/03/2015 13:54:48
Close Date: 28/04/2015
Initiated Date: 31/03/2015 13:54:48

Send Date: 31/03/2015 13:59:48
Last Send Date: 31/03/2015 13:59:48

660
Sent

648
Delivered

2
Opens

3
Clicks

0
Social

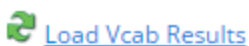
⌵

[OVERVIEW](#) | [CREATIVE](#) | [LIVE FEED](#) | [CONVERSIONS](#) | [CLICKS](#) | [CLICK RATES](#) | [BROWSER BREAKDOWN](#) | [POST CLICK TRACKING](#) | **[VCAB](#)**

[Load 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



10-Digital-marketing-essentials-for-2015-Smart-Insights-CommuniGator.pdf



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

VCAB RESULTS - PAGES - 10-DIGITAL-MARKETING-ESSENTIALS-FOR-2015-SM...

PAGE RESULTS

1	2	3	4	5	6
Total Hits: 1 Distinct Hits: 1	Total Hits: 1 Distinct Hits: 1	Total Hits: 1 Distinct Hits: 1	Total Hits: 1 Distinct Hits: 1	Total Hits: 1 Distinct Hits: 1	Total Hits: 1 Distinct Hits: 1

7	8	9	10	11	12
Total Hits: 1 Distinct Hits: 1	Total Hits: 1 Distinct Hits: 1	Total Hits: 1 Distinct Hits: 1	Total Hits: 1 Distinct Hits: 1	Total Hits: 1 Distinct Hits: 1	Total Hits: 1 Distinct Hits: 1

Clicking on the VCAB cover will take you through to a preview of each page which allows you 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

VCAB RESULTS - CONTACT - 10-DIGITAL-MARKETING-ESSENTIALS-FOR-2015...

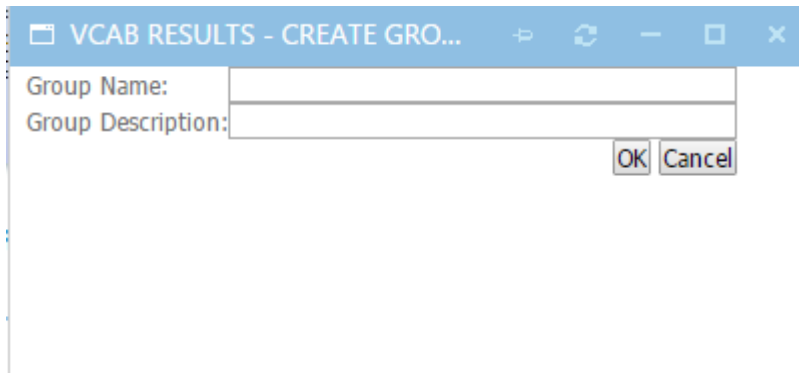
Export to Excel **VCAB People**

VCAB PEOPLE

Firstname	Lastname	Email Address	Total Hits
James	W	James.Wiltshire@communigator.co.uk	1

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.



The image shows a small dialog box titled "VCAB RESULTS - CREATE GRO...". It has a standard Windows-style title bar with a blue background and icons for back, refresh, and window controls. The dialog contains two text input fields. The first is labeled "Group Name:" and the second is labeled "Group Description:". Below these fields are two buttons: "OK" and "Cancel".

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

New Campaign		New Gator Express		Filter/Search	Clear Filter/Search		ABCDEFGHIJKLMNOPQRSTUVWXYZ*									
☐	Name	Notes	Created			Status	Action									
☐	Support Friday Send 18.09.15 Bad Data		09/09/2015 13:12:19				View Results									
☐	Support Friday Send 18.09.15 Good Data		09/09/2015 13:06:50				View Results									
☐	Support Friday Send 04.09.15 Bad Data		03/09/2015 14:35:31				View Results									
☐	Support Friday Send 04.09.15 Good Data		03/09/2015 14:33:00				View Results									
☐	Support Friday Send 28.08.15 Bad Data		24/08/2015 15:40:58				View Results									

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

CloseExport OptionsResults URLCompare CampaignSocial Media

Campaign:

Support Friday Send 04.09.15 Good Data

Status:

Finished

Start Date:

04/09/2015 09:00:00

Send Date:

04/09/2015 09:07:00

Close Date:

10/09/2015 12:00:00

Last Send Date:

04/09/2015 09:07:04

Initiated Date:

03/09/2015 17:04:53

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

Results URL

http://results.gtml1.com/results/123456789

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

The screenshot shows the GatorLeads interface. At the top, there is a navigation bar with tabs: Overview, Creative, Live Feed, Conversions, Clicks, Click Rates, Browser Breakdown, Vcab, Survey, Inbox Checker, and GatorLeads (highlighted with a red circle 1). Below the navigation bar, there is a header section with 'You are Impersonating an Account' and 'GatorLeads'. The main content area displays a table of leads. The table has columns: Rating, Watch, Company, Email Address, Date Score, and Assigned To. A red circle 2 points to the 'Get Contacts' button in the Email Address column. The table lists several leads, including Northgate Information Solutions Plc, SAP, and Squire Technologies.

Rating	Watch	Company	Email Address	Date Score	Assigned To
52		Northgate Information Solutions Plc	Get Contacts	52	Bob Noble
42		SAP	richard.bennington@sap.co...	42	Lee Chadwick
34		Telecommunications Ltd.	ian.lockyer@icomtel.com	34	Assign Lead
33		Car Corporation	Get Contacts	33	Assign Lead
27		Business Integrated	pat@mybusinessintegrated...	27	Assign Lead
23		Sharp	sarahhomer@me.com	23	Assign Lead
21		Linked In	Get Contacts	21	Assign Lead
11		Squire Technologies	Get Contacts	11	Assign Lead
11		Specialist Advisory Service	james.gardner@hertfordshi...	11	Assign Lead

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

GatorLeads

My LeadsAdminAlertsReportingTools

GatorLeads

Show Live Feed

Date Range - Last 7 Days

Currently viewing by Date Score

LeadsContactsCompetitorsCustomersPartnersSuppliersQualified OutAll Companies

1234567...

search

CategoryAssigned ToRatingPer Page

Campaign Source :

Campaign Medium :

Campaign Term :

Campaign Content :

Campaign Name :

Display Campaign List

Filter

Rating

Watch

Company

Email Address

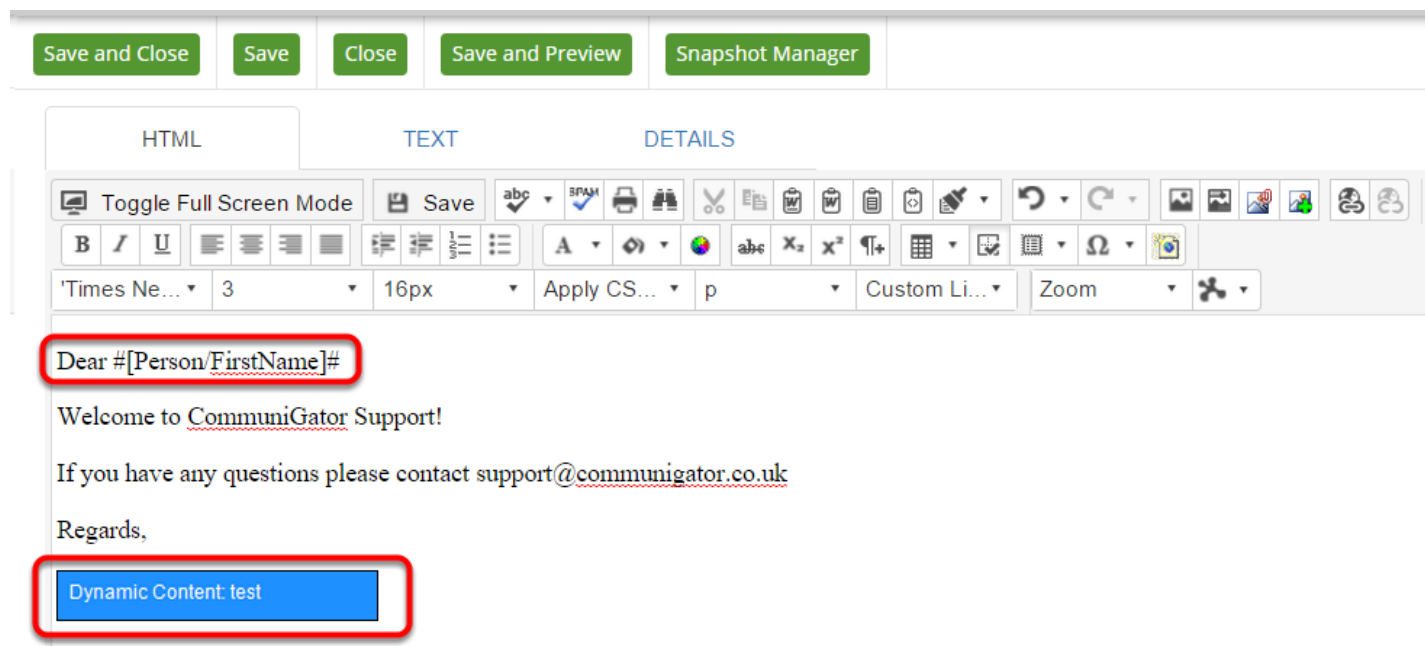
Date Score

Assigned To

How to... Campaign Questions

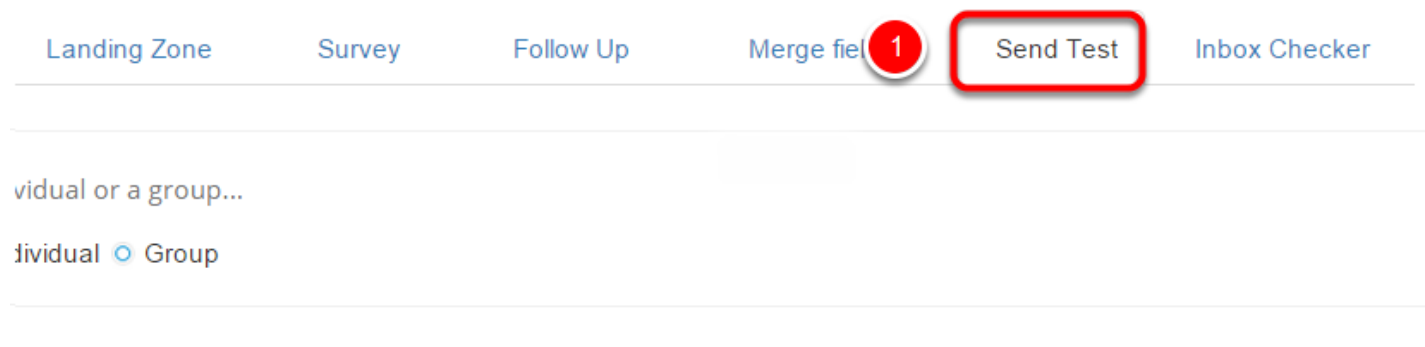
How to Test Dynamic Content and Merge Data

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

Individual Options

First, select a person to mimic by clicking on one of the buttons beside "Contact Email".

Quick Select = Fast method for selecting a contact.

Audience Select = Selects a contact from your audience only.

In either option select a contact from the list shown. The "Contact" selected will NOT get the test.

Second, select or enter an email address in "Send Test To".

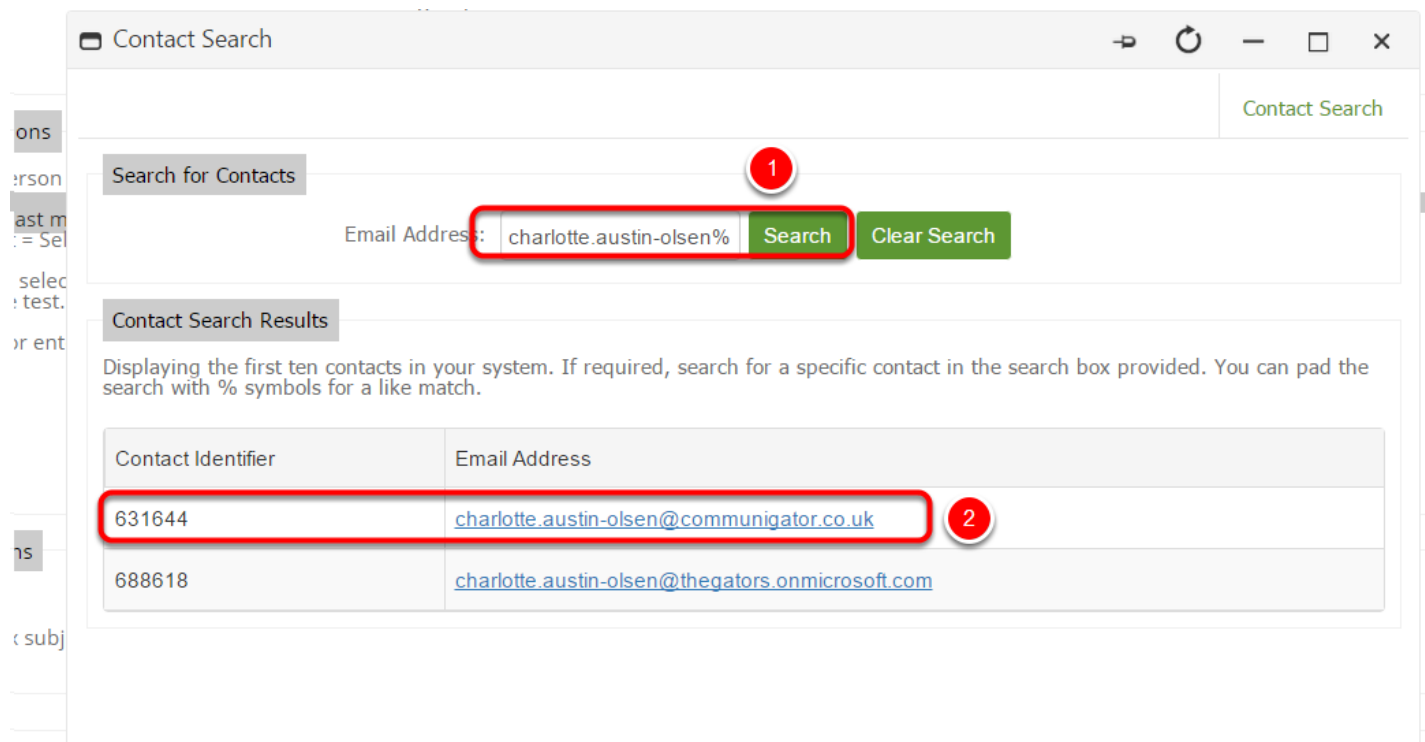


1 Contact: support@communicator.co.uk Quick Select...

Send Test To:

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

Selecting the Contact



Contact Search

Search for Contacts

Email Address: charlotte.austin-olsen% Search Clear Search

Contact Search Results

Displaying the first ten contacts in your system. If required, search for a specific contact in the search box provided. You can pad the search with % symbols for a like match.

Contact Identifier	Email Address
631644	charlotte.austin-olsen@communicator.co.uk
688618	charlotte.austin-olsen@thegators.onmicrosoft.com

1. Search the Contact
2. Select the Contact

Send

In either option select a contact from the list shown. The "Contact" selected will NOT get the test.

Second, select or enter an email address in "Send Test To".

Contact: Quick Select...

Send Test To: ▼ 1

General Options

☐ Both (HTML and Text) ☒ HTML Email ☐ Text Email

Prefix subject with 'Preview:': ☐

Send Test

2 Send Test View All Test Results View In Browser Check Spam Score

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

End Result

Delete	Respond	Quick Steps
	Mon 27/04/2015 12:59 Support@supporttesting.geml1.co.uk Preview: Testing	
To ☐ CommuniGator Support		
DearCharlotte Welcome to CommuniGator Support! If you have any questions please contact support@communigator.co.uk Regards, CommuniGator Support CommuniGator.co.uk email marketing with teeth 		

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

Save and Close **Save and Initiate** **Save** **Close**

Detail Audience Email Landing Zone Survey

Initiate an Inbox Check

Inbox Checker Results 1

As Charles [redacted] on the product will send your email into various mail systems to get advanced spam scoring.

The check process adds the "Start" button. The results will become available in the results screen to do something else and check later, or use the "Refresh" button on the right side of the screen.

Contact: [charlotte@communitagator.co.uk](#) **Quick Select** 2

HTML Email Test Email

Start **Cancel**

Search for Contacts

Email Address: charlotte.austin@olem% **Search** **Clear Search**

Contact Search Results

Displaying the first contacts in your system. If required, search for a specific contact in the search box with search with % symbols for a file match.

Contact Identifier	Email Address
631644	charlotte_austin_olem@communitagator.co.uk
688618	charlotte.austin@theagents.comicpost.co.uk

ice Email Landing Zone Survey Follow Up Merge fields Send

Inbox Checker: This add-on to the product will send your email into various mail systems and spam check product to get advanced spam scoring.

The check process adds the "Start" button. The results will become available in the results section below, please click in this screen to do something else and check later, or use the "Refresh" button on the grid below to check.

Contact: [charlotte.austin@olem.co.uk](#) **Quick Select**

HTML Email Test Email

3 **Start** **Cancel**

AOL Mail Chrome	AOL Mail Desktop	AOL Mail Firefox	Asses Mail 7	Asses Mail 8
Great Chrome	Great Desktop	Great Firefox	Great Asses (Chrome)	Google App (Chrome)
Paid Review	Paid Mini	Phone 5 iOS 7	Phone 5 iOS 8	iPhone 6

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

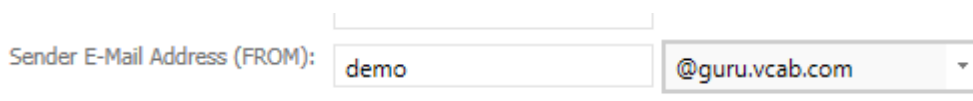
- ## Campaigns

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.

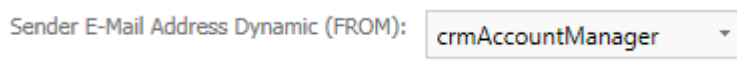
Sender Email Address



Sender E-Mail Address (FROM): @guru.vcab.com

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



Sender E-Mail Address Dynamic (FROM): crmAccountManager

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 were 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

The Campaign Name **Campaign 1409** is in use. Please save as another name.

Detail

Audience

Email

Landing Zone

Survey

Follow Up

Merge fields

Send Test

Inbox Checker

Standard Details

Status: **In Setup**

Name: Campaign 14095

Notes:

Launch Date and Time: 17/09/2015 14:43

Close Date and Time: 17/10/2015 00:00

Type: EMail

Action Type: EMail

Sender Alias:

Sender E-Mail Address (FROM):

Reply E-Mail Address (REPLY-TO):

SMS

Follow Up Campaign

RSS To Email

Show Advanced Options

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

The interface shows a top bar with buttons: 'Save and Close', 'Save and Initiate', 'Save', and 'Close'. Below this is a message: 'The Campaign Name **Campaign 1409** is in use. Please save as another name.' A tabbed interface has 'Detail', 'Audience', 'SMS' (selected), and 'Send Test' tabs. The 'SMS' tab is highlighted with a red circle '1'. Below the tabs is a section titled 'SMS Campaign' with a description: 'Simple, attach an email to the campaign that the entire audience will receive. If desired attach multiple contact receives.' There are two input fields: 'Enter an Alias for the SMS message:' (with a red circle '2') and 'SMS Message:' (with a red circle '3'). Below these is a green 'Attach SMS' button (with a red circle '4'). At the bottom is a section titled 'Attached SMS' containing a table with columns 'Alias' and 'Message'. The table is empty, with the text 'No records to display.' below it.

Save and Close Save and Initiate Save Close

The Campaign Name **Campaign 1409** is in use. Please save as another name.

Detail Audience SMS Send Test

SMS Campaign

Simple, attach an email to the campaign that the entire audience will receive. If desired attach multiple contact receives.

Enter an Alias for the SMS message:

SMS Message:

Attach SMS

Attached SMS

Alias	Message
-------	---------

No records to display.

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 Communicator 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.

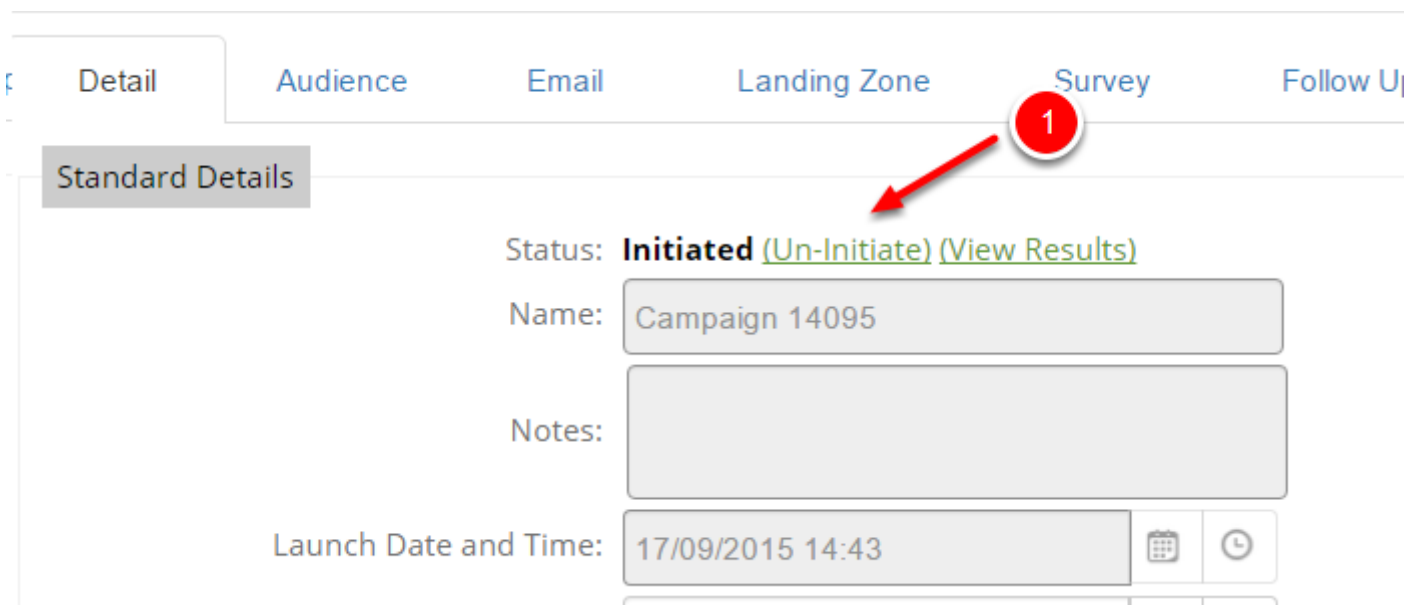
How to Uninitiate a Campaign

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



The screenshot shows the 'Detail' tab of a campaign interface. The 'Status' is 'Initiated', and there is a red circle with the number '1' next to the '(Un-Initiate)' link. A red arrow points from this link to the 'Standard Details' section. The 'Name' is 'Campaign 14095', and the 'Launch Date and Time' is '17/09/2015 14:43'.

Detail Audience Email Landing Zone Survey Follow Up

Standard Details

Status: **Initiated** (Un-Initiate) (View Results)

Name: Campaign 14095

Notes:

Launch Date and Time: 17/09/2015 14:43

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

The screenshot shows the top navigation bar with buttons: Save and Close, Save, and Close. Below this is a sub-header 'Campaign Detail - Campaign'. A series of tabs includes Detail, Audience, Email, Landing Zone, Survey, Follow Up, Merge fields, Send Test, Resend (highlighted with a red circle and number 1), and Inbox Checker. The 'Resend' tab is active, showing a 'Campaign Resend' section with a 'Resend Type' dropdown menu containing three options: All Campaign Audience (selected with a blue dot and a red circle with number 2), All Failed Emails, and Selected Individual. Below the dropdown is a green 'Resend Campaign' button.

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

Resending to a Selected Individual

This screenshot shows the 'Resend' tab with the 'Selected Individual' option selected in the 'Resend Type' dropdown. Below the dropdown, there is a 'Contact:' label followed by a text input field. To the right of the input field are two green buttons: 'Quick Select...' and 'Audience Select...'. At the bottom of the section is a green 'Resend Campaign' button.

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

[Detail](#)[Audience](#)[Email](#)[Landing Zone](#)[Survey](#)[Follow Up](#)[Merge fields](#)[Send Test](#)[Resend](#)[Inbox](#)

Campaign Resend

Resend Type: ☒ All Campaign Audience ☐ All Failed Emails ☐ Selected Individual

Resend Campaign

Resend has been initiated

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

Save and Close

Save and Initiate

Save

Close

Campaign Detail - CommuniGator

DetailAudienceEmailLanding ZoneSurveyFollow UpMerge fieldsSend TestInbox Checker

Email Type

Please select the type of email you would like to setup...

Email Type:

Standard

Split Test

Standard Email Campaign

Simple, attach an email to the campaign that the entire audience will receive. If desired attach multiple emails to the campaign and use selection criteria to decide which email the contact receives.

Select the Email Design:

Search for an Email

...

Subject Line:

Custom Li...

Attach Email

Attached Emails

Below are all the Emails attached to this Campaign...

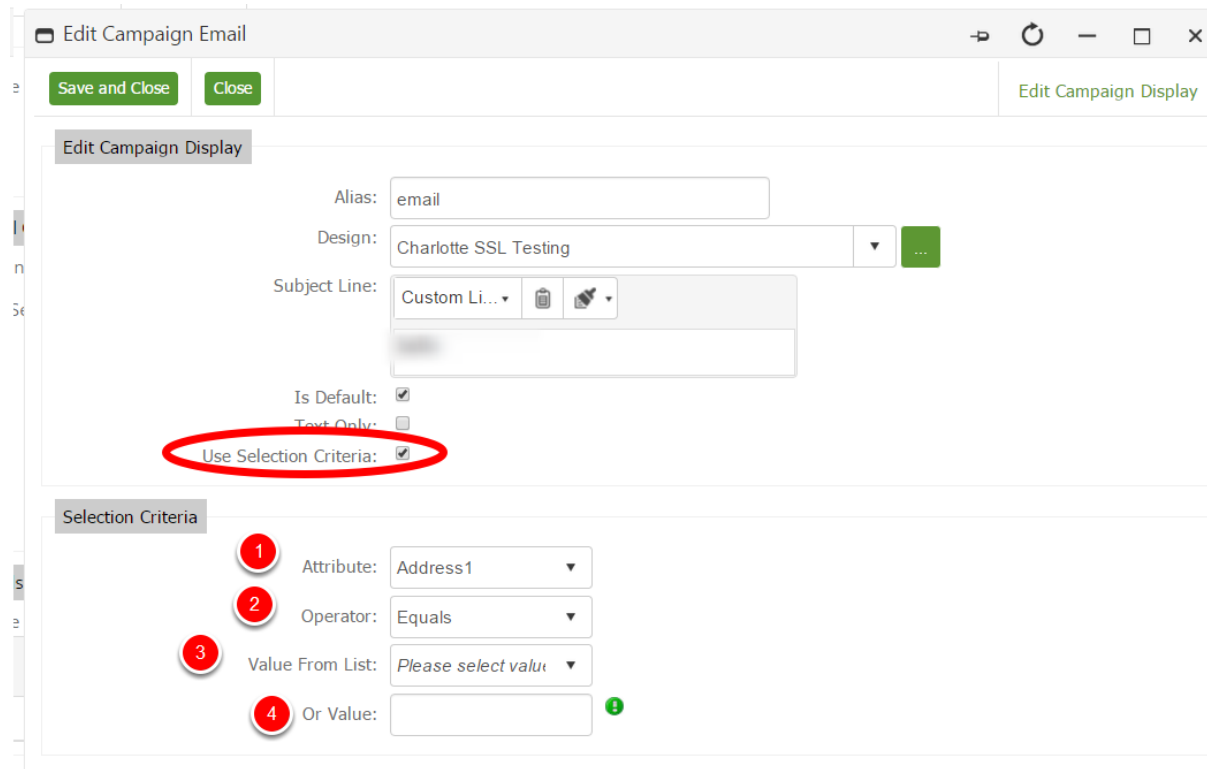
	Alias	Design	Subject Line	Is Default	TextOnly	Articles	Events	Dynamic Content	
	email	Charlotte SSL Testing	hello	1	0				

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

Campaigns

Page 89

Selecting a Criteria



The screenshot shows the 'Edit Campaign Email' window. At the top, there are buttons for 'Save and Close' and 'Close', and a tab labeled 'Edit Campaign Display'. The main section is titled 'Edit Campaign Display' and contains the following fields:

- Alias: email
- Design: Charlotte SSL Testing
- Subject Line: Custom Li...
- Is Default: ☒
- Text Only: ☐
- Use Selection Criteria: ☒ (highlighted with a red circle)

Below the 'Edit Campaign Display' section is the 'Selection Criteria' section, which contains four numbered steps:

1. Attribute: Address1
2. Operator: Equals
3. Value From List: Please select value
4. Or Value: (empty field)

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

Email Type

Please select the type of email you would like to setup...

Email Type: ☐ Standard ☒ Split Test

Split Test Campaign

Split test allows you to attach up to two different emails and two different subject lines to the campaign.
By initiating these to a proportion of your audience, you then send the remaining audience the winning design.

The winning design send can be automatic or manual. For automatic, specify the amount of days after the original send to complete the split test. For manual you must choose the winning design from the campaign results.

Setup Events

Sample Size: ☐ Actual ☒ Percentage

Percentage: 10 %

Send Method: ☐ Manual ☒ AutoSend

Hours: 1

Days: 1

AutoSend Criteria: ☐ Open Rate ☒ Click Through

Design 1: Search for an Email

Alias 1:

Sender Alias 1:

Subject Line 1: Custom Li...  

Design 2: Search for an Email

Alias 2:

Sender Alias 2:

Subject Line 2: Custom Li...  

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

Split test rules

the winning design send can be automatic or manual. For automatic, specify the

Setup Events

1 Sample Size: ☐ Actual ☒ Percentage

Percentage: %

2

3 Send Method: ☐ Manual ☒ AutoSend

Hours:

Days:

4 AutoSend Criteria: ☐ Open Rate ☒ Click Through

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 participate 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

Design send can be automatic or manual. For automatic, specify the amount of days after the original send to complete the split test. For manual you must click from the campaign results.

Setup Events

Sample Size: ☐ Actual ☒ Percentage

Percentage: %

Send Method: ☒ Manual ☐ AutoSend

Hours:

Days:

AutoSend Criteria: ☐ Open Rate ☒ Click Through

Design 1:

Alias 1:

Sender Alias 1:

Subject Line 1:

Design 2:

Alias 2:

Sender Alias 2:

Subject Line 2:

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

Attached Emails

Below are all the Emails attached to this Campaign...

Alias	Design	Subject Line	Is Default	TextOnly	Articles	Events	Dynamic Content	
 email	Charlotte SSL Testing	hello	1	0				

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

Setup Articles

Save and Close

Save

Close

Please add or remove articles for your email by 1) selecting the article block you wish to add articles to and 2) moving articles between the left (excluded) and the right (included) grids.

Article Block

Article_1

Search

Article Title

Search

Clear

Article Title	Created Date
	17/09/2015 11:52:35
	14/09/2015 10:21:04
	14/09/2015 10:09:25

➡

⬅

⬆

⬇

 Set Article Rules

 Clear Article Rules

Article Title	Created Date
No records to display.	

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

Setup Article Rules

Save Close Setup Article Rules

Setup Article Rules

Article Title: Mobile DevTools: Remote Debugging for Android with Screencast - Google Chrome

Configure the rules which will determine whether the selected article will be displayed for each contact.

+ Add Rule 1

(Attribute Name	Operator	Value	) And/Or
accountmanageremail	(=) Equal To		And X

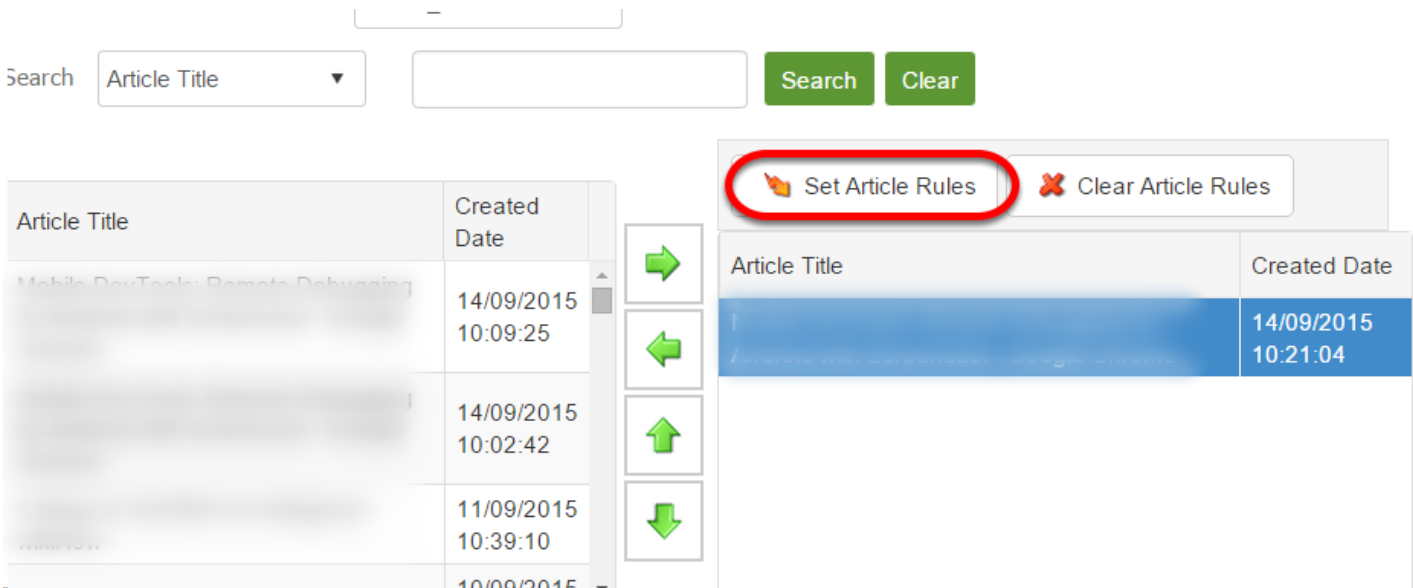
2 3 4 5

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.

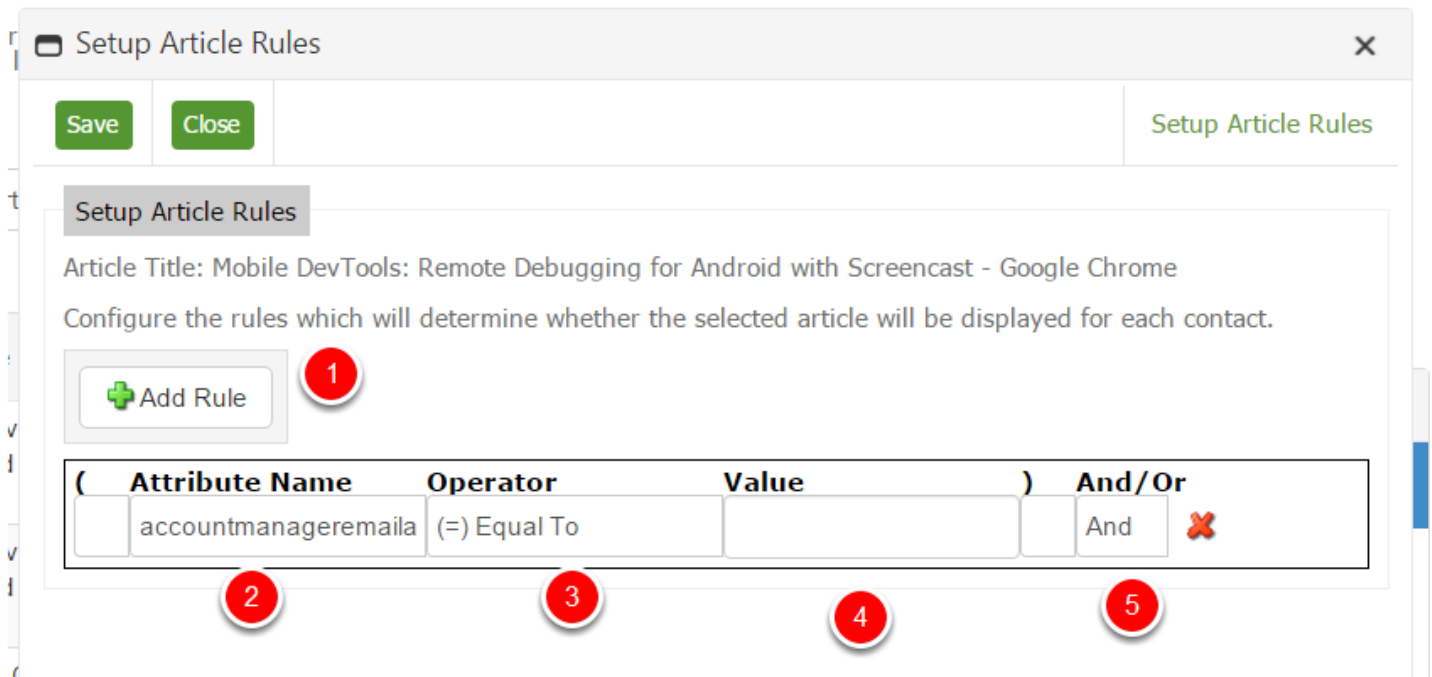
If you would like to add additional rules click add rule and this will place the rule below the rule you have just created. Once you are happy with the rule click save, then click close and you would have successfully created a dynamic article block rule.

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

Save and Close

Save and Initiate

Save

Close

Campaign Detail - CommuniGator

Detail

Audience

Email

Landing Zone

Survey

Follow Up

Merge fields

Send Test

Inbox Checker

Attached Follow Ups

Follow Up Name:

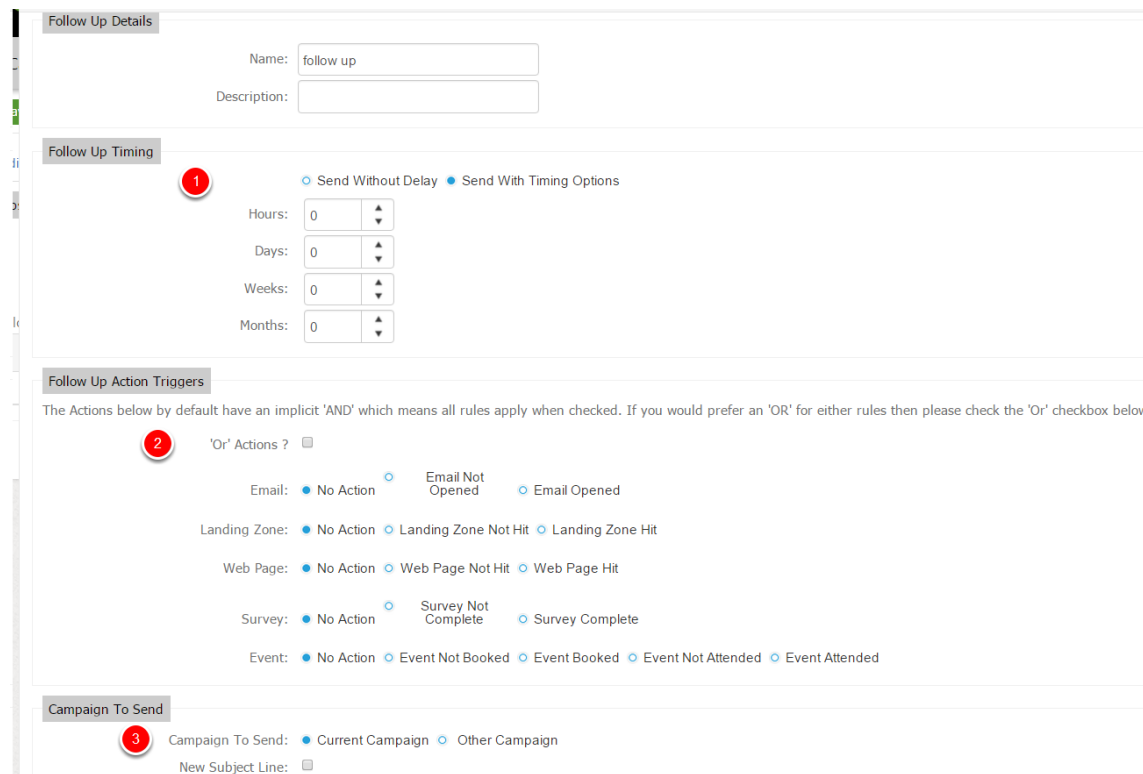
Attach Follow Up

Below are all the follow up emails attached to this Campaign...

Name	Description	Send Type
No records to display.		

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



Follow Up Details

Name: follow up

Description:

Follow Up Timing

1

☐ Send Without Delay ☒ Send With Timing Options

Hours: 0

Days: 0

Weeks: 0

Months: 0

Follow Up Action Triggers

The Actions below by default have an implicit 'AND' which means all rules apply when checked. If you would prefer an 'OR' for either rules then please check the 'Or' checkbox below.

2

'Or' Actions ? ☐

Email: ☒ No Action ☐ Email Not Opened ☐ Email Opened

Landing Zone: ☒ No Action ☐ Landing Zone Not Hit ☐ Landing Zone Hit

Web Page: ☒ No Action ☐ Web Page Not Hit ☐ Web Page Hit

Survey: ☒ No Action ☐ Survey Not Complete ☐ Survey Complete

Event: ☒ No Action ☐ Event Not Booked ☐ Event Booked ☐ Event Not Attended ☐ Event Attended

Campaign To Send

3

Campaign To Send: ☒ Current Campaign ☐ Other Campaign

New Subject Line: ☐

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

The screenshot shows the CommuniGator web application interface. At the top, there is a navigation bar with the CommuniGator logo, user information (support@communigator.co.uk), instance information (supporttestinglz), and support links (Live Chat, Email Us, Video). Below the navigation bar is a secondary menu with options: Home, Recent, Calendar, Campaigns, Creative, Events, Audience, Templates, Tools, Reporting, Admin, and Help. The 'Tools' menu is open, showing a list of options: Business Object, Campaign Series, CSS Select, File Manager, Integration, Lead Score Set Up, My Details, RSS External Feeds, RSS Internal Feeds, Send to a friend, Suppress Domain, System Defaults, Test Group, and Unsubscribe. The 'Test Group' option is highlighted with a red circle and the number 2. In the background, the 'Add New Test Group' button is highlighted with a red circle and the number 1.

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

Adding a New Test Group

The screenshot shows the 'Add New Test Group' form in the CommuniGator web application. At the top, there is a navigation bar with the CommuniGator logo, user information (support@communigator.co.uk), instance information (supporttestinglz), and support links (Live Chat, Email Us, Video). Below the navigation bar is a secondary menu with options: Home, Recent, Calendar, Campaigns, Creative, Events, Audience, Templates, Tools, Reporting, Admin, and Help. The 'Tools' menu is open, showing a list of options: Business Object, Campaign Series, CSS Select, File Manager, Integration, Lead Score Set Up, My Details, RSS External Feeds, RSS Internal Feeds, Send to a friend, Suppress Domain, System Defaults, Test Group, and Unsubscribe. The 'Test Group' option is highlighted with a red circle and the number 2. In the background, the 'Add New Test Group' button is highlighted with a red circle and the number 1. Below the navigation bar, there is a form with a text input field labeled 'Test Group' containing the text 'TestGroup'. To the right of the input field are three buttons: 'Add', 'Cancel', and 'Clear Filter/Search'. The 'Add' button is highlighted with a red circle and the number 3.

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

NOTE: You can only add contacts into test groups if they have been imported into the product.

The screenshot shows a web interface for adding a contact to a test group. At the top, there are two buttons: 'Add Group Contact' (marked with a red circle and number 1) and 'Filter/Search'. Below these is a table with two columns: 'Contact Id' and 'Email'. Under the 'Contact Id' column, there is a text input field and a green button labeled 'Select Contact...' (marked with a red circle and number 2). At the bottom right of the interface, there are two green buttons: 'Add' (marked with a red circle and number 3) and 'Cancel'.

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

The screenshot shows a configuration page for sending a test. It has a top navigation bar with tabs: 'Detail', 'Audience', 'Email', 'Landing Zone', 'Survey', 'Follow Up', 'Merge fields', and 'Send Test'. The 'Send Test' tab is active. The page is divided into several sections: 'Test Audience Type' with radio buttons for 'Individual' and 'Group' (the latter is selected); 'Test Group Options' with a dropdown menu for 'Test Group' set to 'test'; 'General Options' with radio buttons for 'Both (HTML and Text)', 'HTML Email', and 'Text Email' (the latter is selected), and a checkbox for 'Prefix subject with 'Preview:'' which is unchecked; and a 'Send Test' section at the bottom with three green buttons: 'Send Test', 'View All Test Results', and 'Check Spam Score'.

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 an 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

Detail Audience Email Landing Zone Survey Follow Up Merge fields **1** Send Test Inbox Checker

Test Audience Type

Please select whether to send a test to an individual or a group...

☒ Individual ☐ Group

Individual Options

First, select a person to mimic by clicking on one of the buttons beside "Contact Email".

Quick Select = Fast method for selecting a contact.
Audience Select = Selects a contact from your audience only.

In either option select a contact from the list shown. The "Contact" selected will NOT get the test.

Second, select or enter an email address in "Send Test To".

2 Contact: support@communicator.co.uk **Quick Select...** **Audience Select...**

3 Send Test To: charlotte@communicator.co.uk ▼

General Options

☐ Both (HTML and Text) ☒ HTML Email ☐ Text Email

Prefix subject with 'Preview:': ☐

Send Test

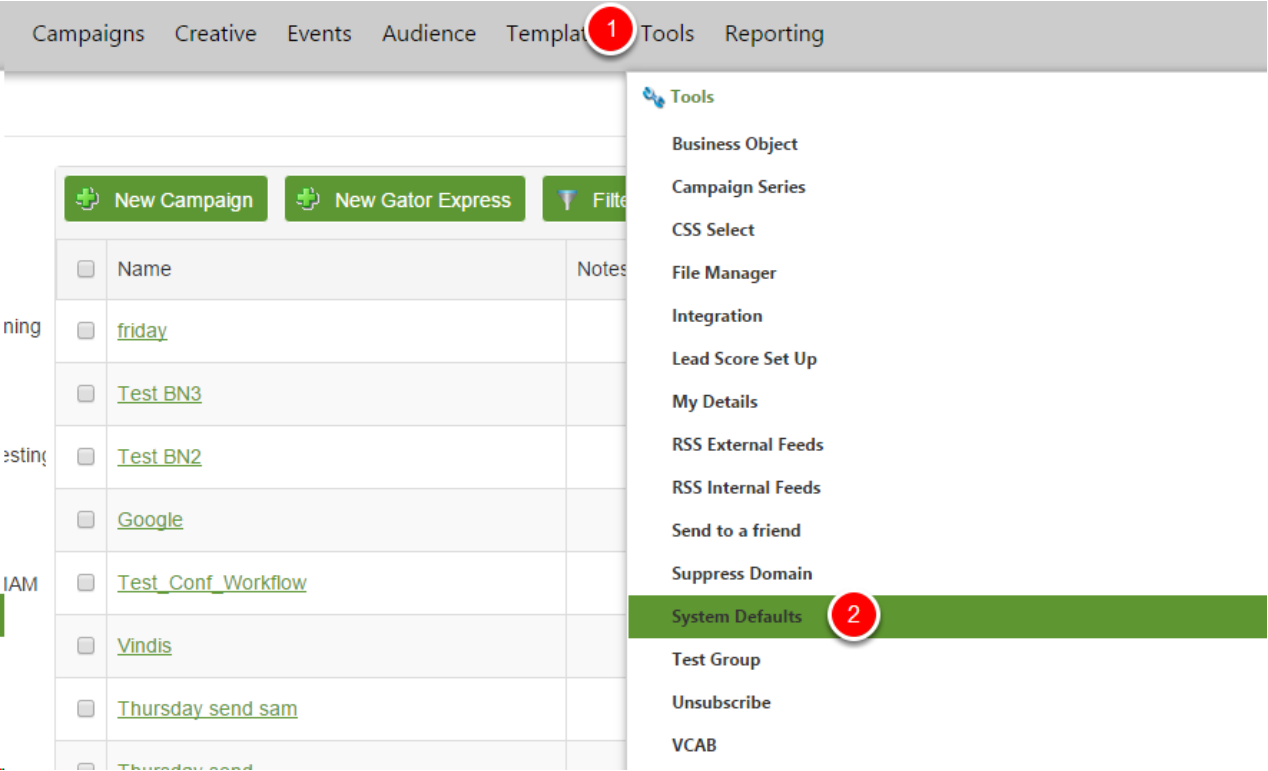
4 **Send Test** **View All Test Results** **View In Browser** **Check Spam Score**

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

[Save](#)

[Campaign Defaults](#) [Tracking Defaults](#) [Editor Defaults](#) [Lead Score Defaults](#) [Social Media Defaults](#) [Other Defaults](#)

System Campaign Defaults

Use the options below to set defaults for campaigns...

1 Sender Alias:

2 Reply E-Mail Address (REPLY-TO):

3 Sender E-Mail Address (MAIL-FROM):

4 Campaign Type:

5 Unsubscribe:

6 Send To A Friend:

7 Close Date Weeks:

8 Close Date Months:

9 Apply Close Date Defaults To Integrated Campaigns: ☐

10 Prefix tests with 'Preview': ☐

Seed Addresses: [0 Seed Addresses defined. Click here to manage.](#)

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

Prefix tests with 'Preview': ☐

Seed Addresses: [0 Seed Addresses defined. Click here to manage.](#)

Click the Seed Addresses button to manage seeds

Adding Seeds

The screenshot shows a window titled 'Manage Seed Addresses'. At the top left is a 'Close' button. At the top right is a 'Manage Seed Addresses' link. Below the title bar, there is instructional text: 'Use this screen to setup default seed addresses which will be applied to all the campaigns you create (these can be removed on a per campaign basis in the campaign screen).' and a note: 'Please note the seed functionality will not send for resends, campaign series, or other triggered sends.' Below this, a toolbar contains three buttons: 'Add New Seed Address' (highlighted with a red box and a red circle with the number 1), 'Filter/Search' (with a funnel icon), and 'Clear Filter/Search' (with a red X icon). To the right of these buttons is an alphabetical character set 'A B C D E F G H I J K L M N O P Q R S T U V W X Y Z *'. Below the toolbar is a text input field labeled 'Contact Email Address'. Below the input field, it says 'No records to display'.

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

1. Click 'Add New Seed Address'

Contacts

This screenshot shows the same 'Manage Seed Addresses' window as before, but with a pop-up dialog box open. The pop-up has a title bar 'Add new Seed Address'. Inside, there is a text input field. To the right of the input field is a button labeled 'Select Contact...' (marked with a red circle and the number 1). To the right of that button are two more buttons: 'Add' (marked with a red circle and the number 2) and 'Cancel'. Below the pop-up, the main window's toolbar and character set are visible, along with the 'Contact Email Address' input field and the 'No records to display' message.

1. Select a contact
2. Click Add contact.

Add as many contacts as needed

1. Go to your campaigns

Save and Close

Save and Initiate

Save

Close

Detail

Audience

Email

Landing Zone

Survey

Follow Up

Standard Details

Status: In Setup

Name:

Campaign1809

Notes:

Launch Date and Time:

18/09/2015 09:33

Close Date and Time:

16/10/2015 09:33

Se

Rep

1

Show Advanced Options

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

You can now see the seed addresses

Advanced Details

Unsubscribe: --None--

Send to a Friend: --

Campaign Strategy: Acquisition

Campaign Code:

Batch Settings: None set

Per day

Use GatorLeads (post click): ☒

Finished Message on End Date: ☐ 

Stop Access Now!: ☐ 

Seed Addresses: 1 Seed Addresses defined. Click here to manage.

Enable Gator Express: ☒ 

Reply

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

Home Recent Calendar Campaigns Creative Events Audience Templates Tools Reporting

Save and Close Save Close

Attribute Details

Enter the attribute name you want to add. There are two options to confirm, whether it is a preferred attribute or not. If you select 'Preferred', a check box on the contact screen. Only select this option if necessary. The data type is used in the web capture to appear as a check box in the web capture.

Attribute Name: DOB

Display Name: DOB

Attribute Data Details

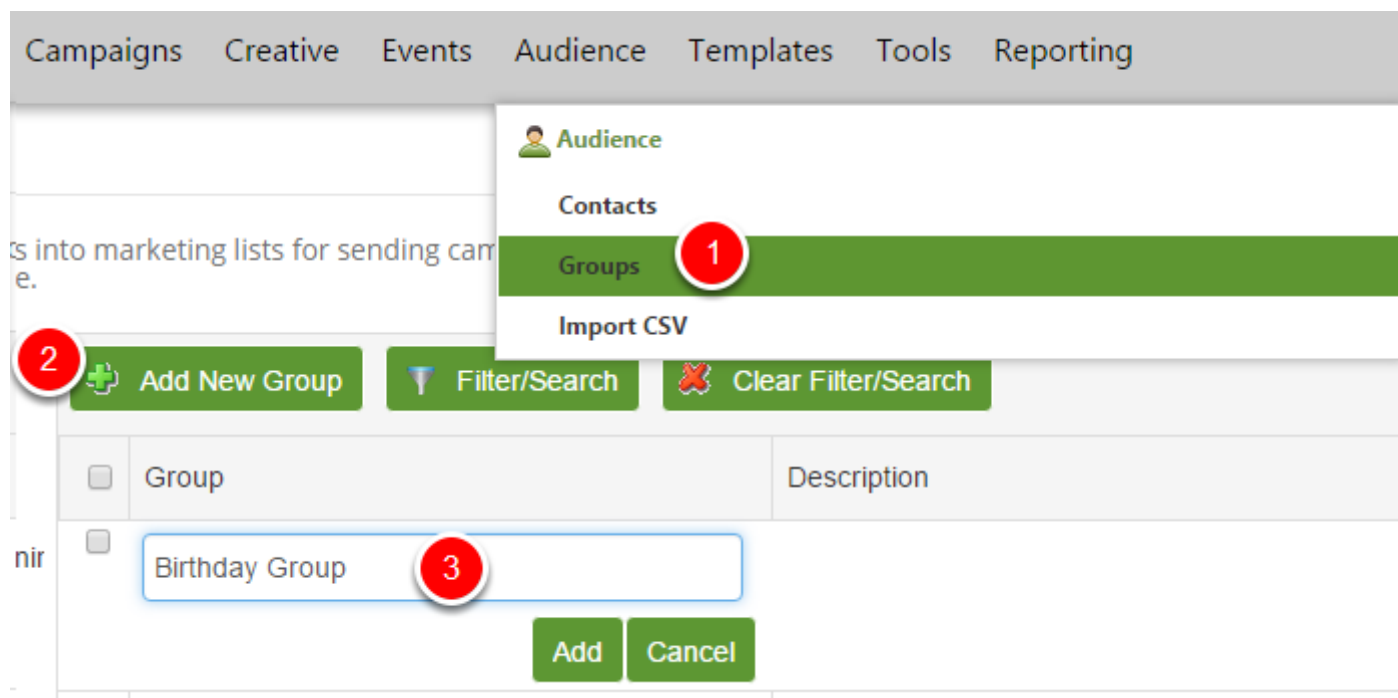
Data Type: Date

Tools

- Business Object
- Campaign Series
- CSS Select
- File Manager
- Integration
- Lead Score Set Up
- My Details
- RSS External Feeds
- RSS Internal Feeds
- Send to a friend
- Suppress Domain
- System Defaults
- Test Group
- Unsubscribe

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

The screenshot shows a 'Setup your Rule' dialog box with the following fields and values:

- Rule Type:** Contact Rule (indicated by a red circle with the number 1)
- Description:** BirthdayDay (indicated by a red circle with the number 2)
- Contact Field:** DOB (indicated by a red circle with the number 3)
- Operator:** Is Equal To (indicated by a red circle with the number 4)
- Dynamic Date:** datepart(d,GETDATE()) (indicated by a red circle with the number 5 and a green information icon)
- Value:** (empty field with calendar and clock icons)
- Add:** (green button, indicated by a red circle with the number 6)

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

The screenshot shows a 'Setup your Rule' dialog box with the following fields and values:

- Rule Type: Contact Rule (Step 1)
- Description: BirthdayMonth (Step 2)
- Contact Field: DOB (Step 3)
- Operator: Is Equal To (Step 4)
- Dynamic Date: datepart(m,GETDATE()) (Step 5)
- Value: (Empty field with calendar and clock icons)
- Add button (Step 6)

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

Rules

Group Name: Birthday Group

Show Key

BirthdayDay Count: 0 And

BirthdayMonth Count: 1 And Or

Total Count: 1

Click to Update

Included Groups Excluded Groups

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

Detail Audience Email Landing Zone Survey Follow Up Merge fields Send Test Inbox Checker

Standard Details

Status: In Setup

Name: friday

Notes:

Launch Date and Time: 18/09/2015 09:33

Close Date and Time: 13/09/2017 09:33

Type: Email

Action Type: Static Recurring

Recurrence Interval: Weekly

Recurrence Interval: Weeks: 1

Don't Send if Received in the Last: Weeks: 51

Sender Alias: L...

Sender E-Mail Address (FROM): k...@guru.gatormail.co.uk

Reply E-Mail Address (REPLY-TO): a...

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

Detail

Audience

Email

Landing Zone

Survey

Follow Up

Merge fields

Send Test

Inbox Checker

Standard Details

Status: In Setup

Name: campaign1809

Notes:

Launch Date and Time: 18/09/2015 09:33

Close Date and Time: 13/09/2017 09:33

Type: EMail

Action Type: Static

Sender Alias: L

Sender E-Mail Address (FROM): @guru.gatormail.co.uk

Reply E-Mail Address (REPLY-TO): a@communigator.co.uk

Show 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

Advanced Details

Unsubscribe: --None--

Send to a Friend: --

Campaign Strategy: Acquisition

Campaign Code:

Batch Settings: None set

Per day

Use GatorLeads (post click): ☒

Finished Message on End Date: ☐

Stop Access Now!: ☐

Seed Addresses: 0 Seed Addresses defined. Click here to manage.

Enable Gator Express: ☒

Reply

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

Batch Volume

Batch Settings: None set

100,000

90,000

80,000

70,000

60,000

50,000

40,000

30,000

20,000

15,000

10,000

5,000

4,000

3,000

2,000

1,000

500

GatorLeads (post click):

Message on End Date:

Stop Access Now!:

Seed Addresses:

Enable Gator Express:

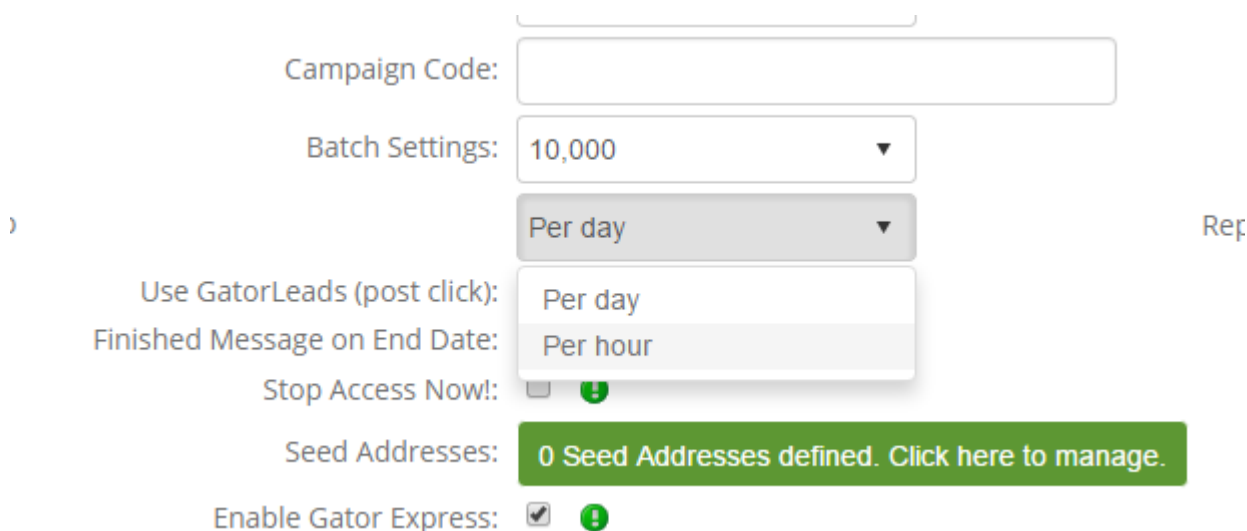
Copy Campaign:

audience (of the selected campaign):

Click here to

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

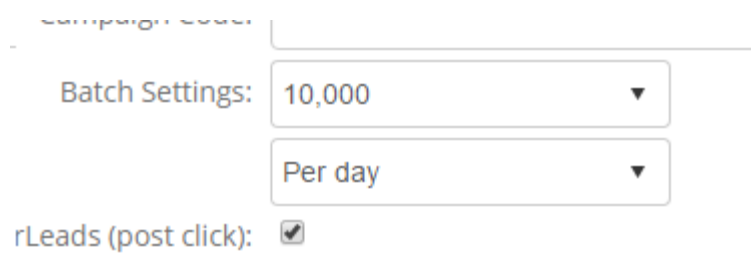


The screenshot shows a form with the following fields and options:

- Campaign Code:** A text input field.
- Batch Settings:** A dropdown menu currently showing "10,000".
- Frequency:** A dropdown menu with "Per day" selected. A tooltip is visible showing "Per day" and "Per hour" as options.
- Use GatorLeads (post click):** A checkbox that is checked.
- Finished Message on End Date:** A checkbox that is unchecked.
- Stop Access Now:** A checkbox that is unchecked, with a green information icon.
- Seed Addresses:** A green button that says "0 Seed Addresses defined. Click here to manage."
- Enable Gator Express:** A checkbox that is checked, with a green information icon.

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

Initiating your campaign with Batch Settings



The screenshot shows a form with the following fields and options:

- Campaign Code:** A text input field.
- Batch Settings:** A dropdown menu currently showing "10,000".
- Frequency:** A dropdown menu currently showing "Per day".
- Use GatorLeads (post click):** A checkbox that is checked.

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

The screenshot shows the 'Survey' tab in the campaign details section. It includes sections for 'Survey Selection' (with dropdowns for design and reference number), 'Attached Surveys' (a table of existing surveys), and an 'Edit Campaign Survey' form. The 'Edit Campaign Survey' form has checkboxes for 'Is Default', 'Is Anonymous', 'Authentication Required to View', 'Use Selection Criteria', and 'Use Notification Emails'. The 'Notification Emails' section at the bottom is currently empty.

Alias	Survey	Reference Number	Is Default	Is Anonymous
Survey Demo	Survey Demo	1	1	0

id	Name	Subject	Email Design	Email From	Email To	Email To
No records to display.						

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

Survey type: Standard Testing

Conditional Notifications:

+ Insert 1		
	Notification	
No records to display.		

Conditional Notifications:

Add 3 Cancel		
	Notification	
	test 2	

Conditional Notifications:

+ Insert		
	Notification	
4	test	✖

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

Survey Notifications 9

Save and Close Save Close

Email Notifications

+ 1
✎
✓

Email Details

2 Notify Name: Notification

3 Subject: Notification

4 Email Design: Survey Demo

5 Email From: support@supporttesting

6 Email To: support@communicato

7 accountmanagere

8 Apply Criteria Cancel Criteria

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 must 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

Question Conditions

1 Question: Page 2-Which Cou

2 Answer: United Kingdom

3 Add

4

Reply Reply All Forward IM

Mon 09/03/2015 11:29

support@communicator.co.uk

Support

To: CommuniGator Support

[This Survey has been completed](#)

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 an email notification if the question in the condition has the specified answer in the condition

Contact Conditions Notifications

Contact Conditions

1 Attribute: PositionInCompan ▼

2 Operator: Equals ▼

Value From List: ▼

3 Or Value: support

4 Add

Conditions

PositionInCompany = support

5

Reply Reply All Forward IM

Mon 09/03/2015 11:29

support@communiGator.co.uk

Support

To ☐ CommuniGator Support

[This Survey has been completed](#)

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

Save and Close

Save and Initiate

Save

Close

Detail

Audience

Email

Landing Zone

Survey

Follow

Standard Details

Status: **In Setup**

Name:

Campaign 2309

Notes:

Launch Date and Time:

23/09/2015 12:46

Close Date and Time:

23/10/2015 00:00

Show Advanced Options

1

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

Attaching the Unsubscribe

Advanced Details

1 Unsubscribe: Default Unsubscribe

Send to a Friend: --None-- 2

Campaign Strategy: Default Unsubscribe

Campaign Code: fakeunsub

Batch Settings: Gator testing 39209

gator

Preference Centre

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

Recent Calendar Campaigns Creative Events Audience Templates Tools Reporting Admin

1

Tools

Business Object

Campaign Series

CSS Select

File Manager

Integration

Lead Score Set Up

My Details

RSS External Feeds

RSS Internal Feeds

Send to a friend

Suppress Domain

System Defaults 2

Test Group

Campaign Defaults Tracking Defaults Editor Defaults Lead Score Defaults

Item Campaign Defaults

the options below to set defaults for campaigns...

Sender Alias:

Reply E-Mail Address (REPLY-TO):

Sender E-Mail Address (MAIL-FROM): Support @supporttesting.geml1.co.uk

Campaign Type: Email

3 Unsubscribe: Default Unsubscribe

Send To A Friend: --

unigatemail.co.uk/default.asp?tabId=117#

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

Save and Close Save and Initiate Save Close

Detail Audience Email Landing Zone Survey Folk

Standard Details

Status: **In Setup**

Name: Campaign 2309

Notes:

Launch Date and Time: 23/09/2015 12:46

Close Date and Time: 23/10/2015 00:00

Show Advanced Options 1

'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

Advanced Details

Unsubscribe:	Default Unsubscribe ▼
1 Send to a Friend:	-- ▼
Campaign Strategy:	--
Campaign Code:	AuDeo send to a friend
Batch Settings:	Charlotte SSL Testing
	charlotte test
	Dawn Test
	Demo
	Demo
Use GatorLeads (post click):	Emma Testing
Finished Message on End Date:	Install Example 1
Stop Access Now!	

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

Campaigns

Charlotte

Charlotte

Charlotte

Charlotte

Charlotte

Charlotte

Charlotte

Charlotte

Charlotte

Charlotte

New Campaign

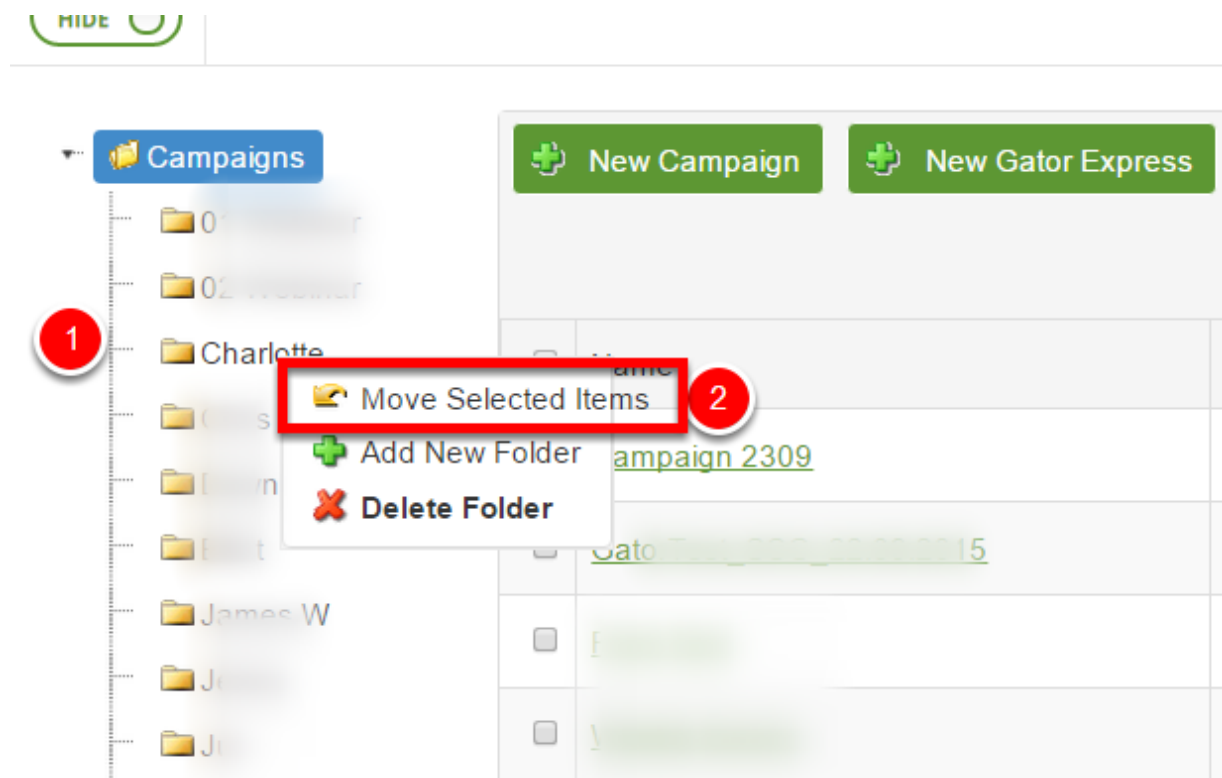
New Gator Express

Filter/Search

☐	Name	Notes
☒	Campaign 2309	
☐		
☐		
☐		

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.

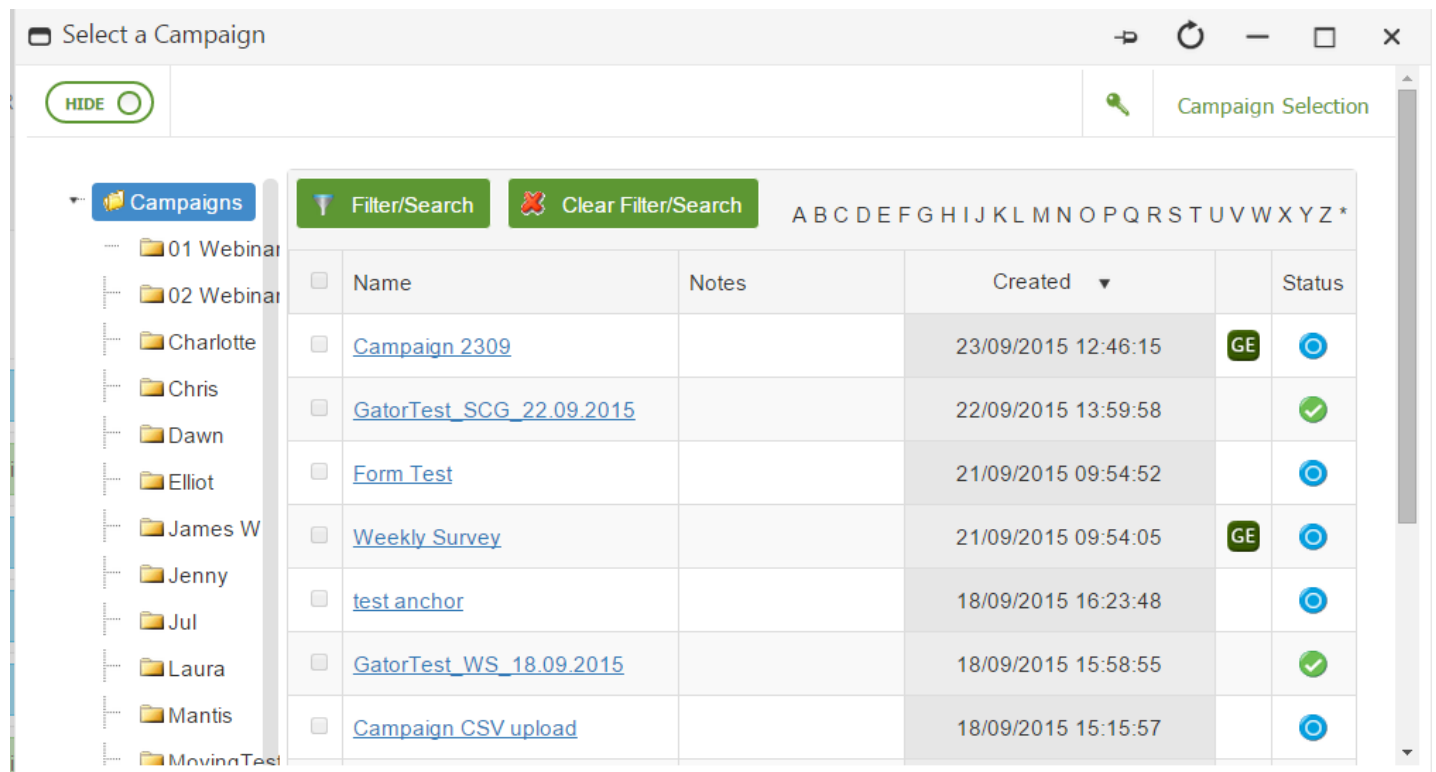
The new campaign will be an exact copy of the one selected. This will include exact copies of the campaign details, any follow ups, surveys or merge fields and audience (if you want to send to a different audience group, make sure to clear this first).

Create a new campaign

The screenshot shows a web interface for managing campaigns. At the top, there are four green buttons: 'New Campaign' (with a plus icon), 'New Gator Express' (with a plus icon), 'Filter/Search' (with a funnel icon), and 'Clear Filter/Search' (with a red X icon). Below these buttons is a table with columns for 'Name', 'Notes', and 'Create'. The 'Name' column has a checkbox and a text input field. The 'Notes' column has a text input field. The 'Create' column has a dropdown menu. Below the table, there is a search bar with a 'Cancel' button, a 'Search for a Campaign' button, and a 'Copy..' button. The 'Copy..' button is highlighted with a red circle and the number 2. The 'New Campaign' button is highlighted with a red circle and the number 1.

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

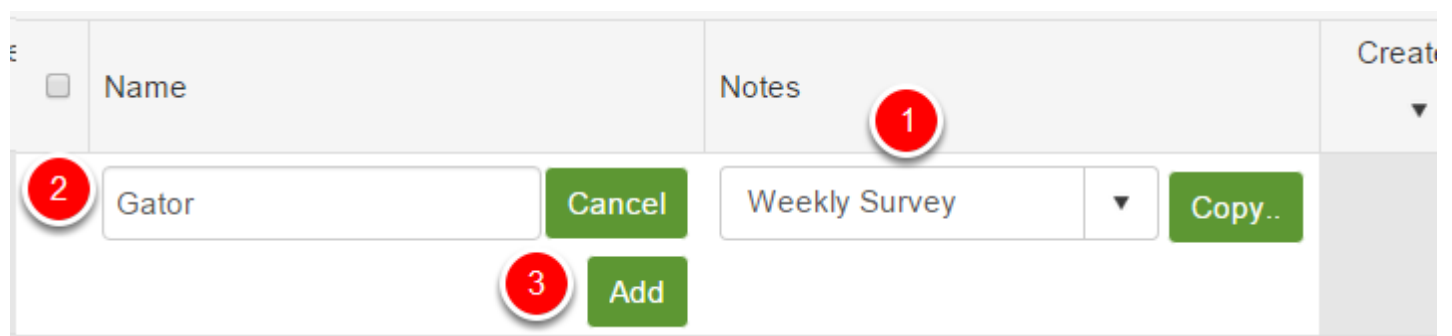
Select the campaign to copy



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.