# Email Marketing User Guide

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1 Locating your Email Marketing Application

Once you have logged on to your Online Presence Portal, you will see the Email Marketing Application in the upper left corner of the blue task bar. Click on the Email Marketing Application to launch.

If you have multiple plans on your account, you will need to select the plan you would like to work with.
2 Start from the beginning

1. Select “Get Started- Create an Email”

2. Choose a template you like and start building your email

**If you already have an email in HTML please refer to section 4 of the guide**

**You can also choose "Start from Scratch" to begin building a brand new email campaign from a bare template.**

2.1 Getting to know your email builder

2.1.1 Content Block

The left sidebar provides a view of the content for each section of the email

You can choose between basic and details view mode.

**Basic:** Shows thumbnail of section layout without any text/images

**Details:** Shows layout of section with text/images showing
1. Hover over the section you want to add to your email

2. Select "click to insert"

2.1.2 Edit Content

Use this tab to edit copy, add images and arrange the placement of your blocks.

EDITING OPTIONS

When in edit mode, you'll notice pop-ups next to the content in your email. You can select one of the buttons to change the background color of an image or section, delete it, copy it or change the image altogether.

To make changes to the content in your email, simply click and the left sidebar will open a menu to edit and make changes to the content you’ve selected. You can easily make change pictures, colors, text, buttons by simply clicking on it in the viewer.

TO CHANGE THE IMAGE:

1. Hover your mouse over the photo

2. Select "click to edit" or double-click the photo

3. You will have the option to "replace" or "edit" the photo on the left sidebar as well. Make sure it is pictured in the thumbnail to ensure you’re editing the correct photo

4. You will be redirected to a different screen where you can choose from the list of options:

- upload your own image
- browse free stock images
- browse free graphics
- browse saved images.
Note: To go back without adding a new image select the “x” to return to your email as you left it

5. Make your selection and choose the image file you would like to import by clicking on the image and selecting "import". The image should appear in the container you chose to edit

6. If you select "edit", the image will appear in the photo editing tool where you can enhance it, choose a filter/effects, crop it and more

Some of the photo editing features include…
- Enhance
- Effects
- Frames
- Stickers
- Resize
- Orientation
- Focus
- Brightness
- Contrast
- Saturation
- Sharpness
- Splash
- Text

7. Once you're finished, select "save"

To change the text:

1. Hover over the text block
2. Select “click to edit” To edit the buttons within a block
Text Editing Tools

When the text box is highlighted blue, type in your own copy. You can edit with the top navigation bar (pictured above). You can also copy, delete or change the background color of the text by hovering over the block you want to edit and choosing from the options (click to edit, copy, change color, delete)

Use the left sidebar to edit text inline (i.e. changing the border type, color and thickness; line height and color of the block; pad row top and bottom in the container)

2.1.3 Page Style

Here you can select the color, border and font displayed in your email. If you know the color code you would like to add, you can enter it in manually.

By clicking on background, you can choose either a color or pattern for the entire background of the email.

2.1.4 Viewing your Email

At the top of your email draft in the editor, you'll notice the following menu:

- Exit the screen and go back to your main dashboard by selecting "exit"
- Undo/Redo any changes you want to revert or bring back
- Preview the email in your browser (with option to view in desktop, mobile or tablet mode), send yourself a test, or send a test kit
- Save without sending
- Next to continue creating your campaign
3  Building Your Campaign

1. Fill out the required fields with your organisation information.

2. Once you are finished with the final touches of your email, select next and fill out your "Campaign & Sender Details".

3. Fill out the required information on the page such as: Email Name, From Name, Subject Line and Preview Text. Please note that there might be some information already filled out. It's important to replace the fields with correct information as to whom the email is being sent from, where to receive replies and other important information.

"On the right you’ll notice an image that shows you where this text will appear in the email"

4. Select “continue” to move on to the next step
3.1 A/B Subject Line Testing

You have the option to test two different subject lines in one email campaign.

In the campaign and sender details section,

1. Select “add A/B testing with different subject lines”

2. You’ll notice the option to type in two separate subject lines

3. Click “continue” to proceed with adding your recipient list

Note: The system will send to 25% of your selected list (12.5% —> A, 12.5% —> B. Based on the better performing subject line, the app will automatically send emails with the more successful subject line to the remaining 75% of the email list.
3.2 Adding Recipients

You have the option to choose from a previously existing email list, add the recipient(s) manually or import from a file.

3.2.1 Email Lists

If you have already created an email list group, you will have the option to select it here. If you have not created a list yet, you can create one using these options.

1. Go to the Contacts section and select, “create new list”.

2. Give your list a name and check the box to confirm whether you want to allow people to sign up for the list.

3. Select, “next”.

Create an email list

Name your list

Allow people to sign up for this list

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3.2.1.1 List Segmentation

Once you have created a list, you can also add segments to the contacts in it.
To do this, select “Segmentation” under the Contacts section.

UNDER CREATE A NEW SEGMENT, FOLLOW THESE STEPS:

Once you have created a list, you can choose one or more to add to the new segment you are creating. After creating a new segment, you can view it under View Saved Segments.

1. Select from the options “All Contacts” or a previously created list. If you choose “All Contacts”, you cannot select it again in Step 4 of the segment process.

2. Choose “Any” or “All” for the Contacts matching criteria.

Note: Any indicates that any contacts the selected conditions can be applied to will be added to the segment. All indicates that only contacts that meet all conditions specified will be added to the segment. Example: for conditions A, B, C ANY indicates A, B or C while ALL indicates A, B and C.
3. Choose from the following conditions to apply to the list segment. Starting with actions or performed, fields or labels and choose, one of the email type options with a date range.

4. If you have selected one or more lists (exclusive of “All Contacts”), you can select “Create a New List”. This will create a list segment with both contact lists included. If you have chosen “All Contacts”, you cannot select it here because it is the Master List. If you only selected one list in the first step, simply select it again here.

5. If it is a new list, select “Save List”.

6. Last, select “Create”.
3.2.2 Quick Add Contacts

In the **Contacts** section you'll notice a form to "Quickly Add Contacts" where you can type in the contact name and email address and add it to one of your exist lists.

You have the option to add new names and contacts one by one.

To add multiple email addresses, select the **Multiple Emails** tab, choose the list you want to add the emails to and select "save".

### Quickly Add Contacts

Choose between adding email addresses one at a time or cut and paste multiple emails.

<table>
<thead>
<tr>
<th>Name/email</th>
<th>Multiple Emails</th>
</tr>
</thead>
</table>

First Name

Last Name

email@company.com

Add another contact

Save this contact to a list:

Select One
3.2.3 Add Contacts Manually

1. To add the recipients manually, select “add manually”

2. Type in the email addresses one by one, and hit space to start typing the next address

Note: If you accidentally type in the same email twice, you will be notified of the error and the email will not be added

3. Once you’re finished adding the recipients, give the list a name and select "save list" to use it again in the future or add the new contacts to an existing list

3.2.4 Import from File

1. Enter a list name and select “next” or choose a list to add the new contacts to

2. On the Add Contacts screen, select “upload file” and choose an attachment from your computer with the names, email addresses of the recipients, and any other custom fields you want to add.
3. You will be taken to a page where you can map your contacts, there are pre-set mapping categories (i.e. name, email address) but you also have the option to create your own

**Note:** The email address field is required to proceed

4. Select, "import" to complete this action. Depending on the size of the list, it may take some time to process all of the contacts in your file

5. Once this is complete, you can save the list

### 3.2.4.1 Mapping Fields

Mapping fields in your email will allow you to send personalized and engaging emails. If you have already prepared a file with fields mapped, the tool will ask you to confirm them in the mapping section. You can also choose fields in advance or set custom fields.

#### Import from Email

If you have an existing contact list in your email, you can import it to the tool. Email providers supported currently are Gmail, Yahoo, Outlook, AOL and Constant Contact.

#### Timing Your Campaign

You have the option to send your email right away or schedule it for a later date and time.
Submit – Success! Your email will be delivered shortly.
4 Import HTML

If you already have an HTML coded email, you can easily copy and paste your code directly into the VR tool.

1. From the dashboard, under Email Campaign select "create one"

2. On the next page, you can choose a template to edit, create an email from scratch or import HTML

3. Select "import HTML"

3. You can type in the HTML code directly or you can copy + paste existing code you have created for your email

4. Once this is completed, select "save"

5. Next, fill in the subject line and preview text of your email with a "from address" and an email address that will accept replies from the your email list

6. Click the heading or select "save" to move to the next section. Edit the footer with your business and contact information

7. Add images from the image gallery. You can choose from a selection of still images, clipart graphics and/or GIFs

8. You will also be able to upload your own image and save it in the tool in case you want to use it again

9. Follow the same steps (as above) for adding recipients and timing your campaign
To upload an image in your html e-mail:

1. Select "upload image" in the Images section

2. Choose an image from your computer

3. It will automatically be added to your Saved Images
5 Email Automation

An Autoresponder series is an email set that is sent out automatically based on pre-defined times and dates. You can set up multiple emails to automatically send out to customers, choose the frequency/timing and get creative with different offers and promotions.

TO GET STARTED:

1. On the home screen under Messages, select "create one" under Email Automation.

2. First, create a name for the Autoresponder and select an email list to send it to. You can choose whether to send it to all contacts, new sign ups only or contacts currently on the list.

3. Next, decide when you would like this email list to receive a message from the series. You can choose frequency based on numbers of days, weeks or hours.
4. Select "Create Email" and follow the steps from Section 2 or 3, to create the emails in your series.

5. Once you're finished, you will have the option to add another email to the series. There is no limit on the number of emails that can be in one series.

6. This will take you through same process from Step 1 of this section

7. Next to the email, select "activate" to begin the series

8. Once the emails have been sent out, under **Messages** on the home screen, you can view the reporting stats. This will show number of emails sent, opened and clicked on.
6  Social Posting

1. Select "Create Social Post" in the main screen

2. If you have not connected a social account, you will be asked to do so at this time. You can connect your Facebook or Twitter account (Note: you must have a personal account connected to your Facebook business page in order to link the account)

3. Once you've signed in, you'll be able to post directly from the VR

4. Use the Compose a new social post window to write a message to your followers (if you chose Twitter you'll notice a character limit)

   Camera/Link: You'll notice the camera and link icon. These will allow you to add links (automatically shortened) or photos to your post

   Post later: This will allow you to choose a date and time for your post in the future in case you don’t want to post right away

6.1.1  Connecting Multiple Social Accounts

Yes, depending on the plan you have with VR, you can connect more than one social account. Click the Contacts tab

Under the Social Account section, select "Add new account". Once the account is connected it will appear under the list of Social Accounts.
6.1.2 Add New Account

1. Go to the **Contacts** section
2. From the list of options in the table, select “social accounts”

3. You will see a drop-down menu letting you select which social account you wish to connect
7 Reporting

7.1 Email Reporting

The Email Marketing Reporting tool provides insight into how your emails are working and how subscribers are interacting with your messages.

To view email statistics, go to Messages and select the email (by clicking the name) from the list.

In the reporting section, you will be able to:

- **View Email** - Preview what your email looks like on different devices by selecting “view email”
- **Share on social** – Create a social post with a link to your email
- **Download Email PDF** - Download a PDF copy of your email
- **Download Reports** - Download the overall stats for your most recent email campaigns
- **Create** – Create a list of Non- and Responders to tailor your Resend Email to target the appropriate audience
On the statistics page, you will see valuable information about the email campaign you sent.

- **Number of emails** sent
- **Number of followers** on social media channels (only applies to connected accounts)
- **Social media** interactions such as clicks, likes, shares comments, retweets
- **Number of opened emails**
- **Number of clicks** – people who opened the email also clicked on a link shared in the body of the message.
- **Unsubscribes/spam** - how many recipients unsubscribed or report spam

### 7.1.1 Create a List of Responders/Non-responders

#### Non-responders

In some cases, customers may notice that some recipients did not open the email (this could be for a number of reasons). If the first email did not capture as many recipients as you had hoped, you can try again by creating a list of the people who did not open the email aka “non-responders”.

1. Select “list of non-responders” next to create
2. You will be prompted to save the new list.

**Note:** if you picked the wrong email or type of list, choose “cancel” and you will return back to the reporting section

#### Responders

Follow the same process as above, but start by clicking on “list of responders”. This represents the people who have opened and/or clicked on something in the email. Before creating the list, you will be prompted to indicate whether you want the list to include both types of responders (clicks and opens). You can now tailor two different types of email campaigns to non-responders vs responders.
7.1.1 Enhanced Reporting Features

Gain valuable, actionable insights from campaigns. Use this information to understand more about your customers and improve your email marketing campaigns by adjusting a message’s appearance, subject line, content, or time sent.

Advanced Reporting features provides the following data on your email campaigns:

- **Device breakdown**: The percentage of users viewing messages on desktops and mobile devices, and which devices they use (e.g. iPhone, iPad, Android)
- **Email providers**: The email programs (e.g. Hotmail, Gmail) recipients read your messages on
- **OS and browser use**: Operating systems and Internet browsers your contacts use
- **Geographic breakdown**: Know where your contacts are located, by state or country
- **Heat maps**
Advanced Reporting also enables you to analyze these metrics:

- Subject lines: Learn how length impacts open rates
- When emails are sent: Measure click rates by time and day
- Comparison reports: Compare and benchmark past emails with those you recently sent
- Multiple list metrics: Send a single message to multiple lists and view a breakdown of opens, clicks, bounces, etc.,

### 7.2 Autoresponder Reporting

Once an Autoresponder email campaign is activated, it will be sent out to new subscribers within at least fifteen minutes. The statistics tracked include number of emails sent and the number of emails opened and clicked on. The stats are recorded for as long as the autoresponder email is active.

### 7.3 Social Post Reporting

Social media post reporting will include information on your current numbers of followers and how many interactions occurred based on your last post. This will you will know how many of your followers are engaging with your content.
8 Settings, Alerts and Help

8.1 Settings

From the Settings section found at the top right corner of the application, users can update their social accounts information, change default and update/add custom fields.

8.1.1 Connect Social Accounts

You can connect your social accounts under Settings as well.

To connect an account select “Connect My Account(s)”. You will be redirected to a new window and prompted to log in to your social media account.
Use this same process to add your Facebook account as well.

### 8.1.2 Default Email Settings

Here, you can specify the email address you want associated with the communications you send out. You can change things like the From Name and Email Address if you don’t want the login email used for Vertical Response in your email communications.

**Note:** not all fields are required in order to save the information provided.

You can also turn on/off your email notification settings as well as updated your contact (address) information.

### 8.1.3 Custom Fields

Under this section, you can specify fields that can later be added to your email recipient lists. For instance, if you wanted to create a list that separated users categorically using custom fields can aid in that.

Let’s say you specify a field as “Home Owner”, now you can add this label to a new recipient with the label of home owner or not (i.e. for Joe Smith, you can now enter true/false for the home owner field)
8.2 Alerts

The alerts section will keep you posted of activity on your account. For instance, if you are adding a large .csv file of new recipients, when the download is complete, there will be a notification under alerts.

8.3 Help

For access to support and help articles use this section, click Help "For this Page"
If you need to provide Feedback or required further Support, click “Support & Feedback”
9 Sign-up Forms

From the Contacts section, you can also set up a Sign up form by selecting the yellow plus sign.

9.1 Hosted Sign up Form

Build your audience

Turn website visitors into email subscribers by adding a sign up form to your website or sharing a link to your form on social media.

1. Select the email list you want to send to, or create a new one.
2. Choose from the two options available to start creating your sign up form

3. If you choose the recommended, "Hosted Sign up form", you will be taken through a step-by-step wizard to set up your sign up list

4. Pre-made templates will be available for you to choose from. Check off the boxes that apply to your list. Once you're finished editing, select "next"

5. Finalize, by adding a thank you and redirect to your website
6. You also have the option to share your sign-up form using the URL or HTML code

9.2 Embeddable HTML Form

1. If you decide to choose the HTML form, you will start by adding values to your form depending on what information you want to capture from your new email signups
2. Once you’ve added the value, this will generate an embedded code for your website or blog where customers can sign up directly

3. Before finalizing, you can change the name of the form, edit the list name or use an existing list

4. Copy and paste your embed code and add it to your website or blog
10 Frequently Asked Questions

What Email Lists can I use?
Your email addresses must be opted in, meaning all recipients have opted in. You cannot use a purchased or rented list, and you can’t use an email address without the recipient’s knowledge. If someone on your list unsubscribes or marks your email as SPAM, you should delete them from your email list and future email campaigns.

Why did my email go to spam?
Spam filters are constantly changing to adapt to new methods that spammers use to send emails. Some possible reasons include:

- The Junk Mail filter identified keywords in the message or subject line that spammers often use in their messages
- The use of excessive punctuation, all capitals or too many emoticons
- The recipient flagged the sender as someone that sends spam
- The recipient's ISP has filtered the mail as spam or junk mail based on the content or the sender's IP address
- The recipient has set up strict spam tagging rules

What is the CAN-SPAM act?
The CAN-SPAM act was enacted to stop the sending of the dreaded email spam. If someone on your email list unsubscribes or reports spam, it is considered illegal to continue sending them email marketing messages. The consequences of ignoring this law could result in costly fines.

What does bounce mean?
Bounces are email addresses that don't make it to an inbox.

Hard Bounce - A hard bounce generally means that the email address is invalid; these emails will never be delivered.

Soft Bounce - A soft bounce indicates a temporary issue that's preventing the email from being received, such as a restriction on the recipient’s mailbox size.

How is the email time zone determined?
When scheduling an email for a later date/time, keep in mind the time zone will be that of your own personal settings.

Gmail automatically displays my images, will this affect my Open Rate?
Gmail made some changes to their system, and now images are displayed automatically when an email is opened. You may see a better open rate for your Gmail readers than you have in the past but this is not a guarantee.