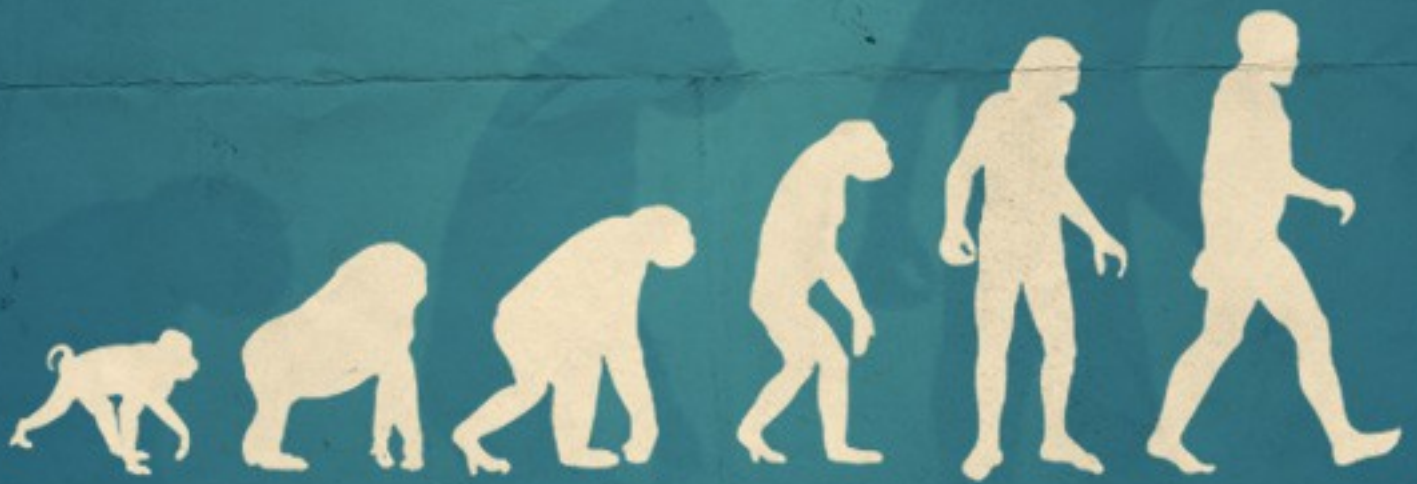# FIRST STEPS

ON EMAILMANAGER

A QUICK GUIDE FOR BEGINNERS
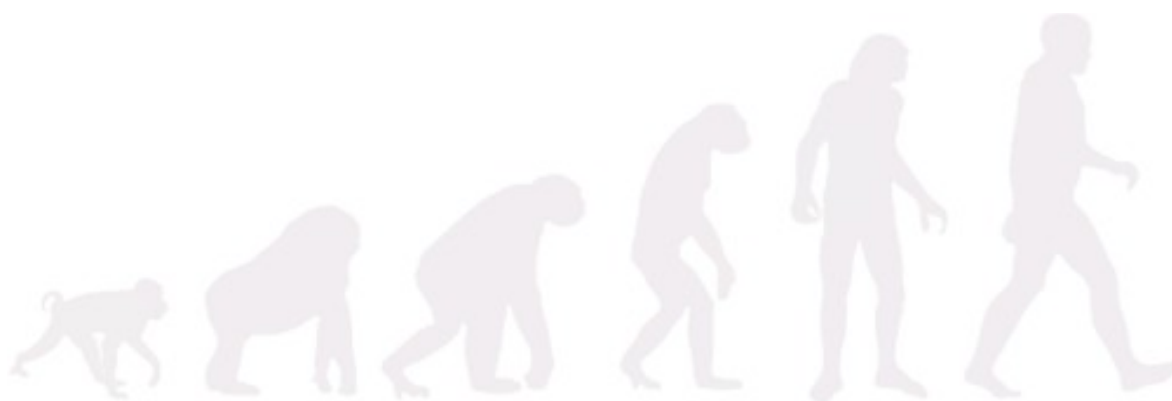
emailmanager

Introduction

Hello!

Welcome to **emailmanager**. The best email marketing system on the market. This guide provides basic steps on how to use the **emailmanager** system.

In this guide you will learn how to:

- Create a list

- Import contacts list

- Create and send campaigns

- Monitor results

Take a look at the other guides available on our site and find out how you can fully benefit from our online tool. Learn more how to maximize your results and ROI.

Getting started with emailmanager in 3 easy steps

When we access the **emailmanager** for the first time, we should get familiar with a Dashboard. It has a function that provides a summary of the system's main information. In order to make it simple and conveniently for you to learn, we provide a step-by-step guide that walks you through various processes such as: creating list, adding contacts, creating and sending campaigns and monitoring results.

Step 1 – Create a contact list

Creating a list is a very first step while building your campaign. A contact list is a place where your contact information will be stored. We recommend that the name of your list is relevant to the contacts from your database.
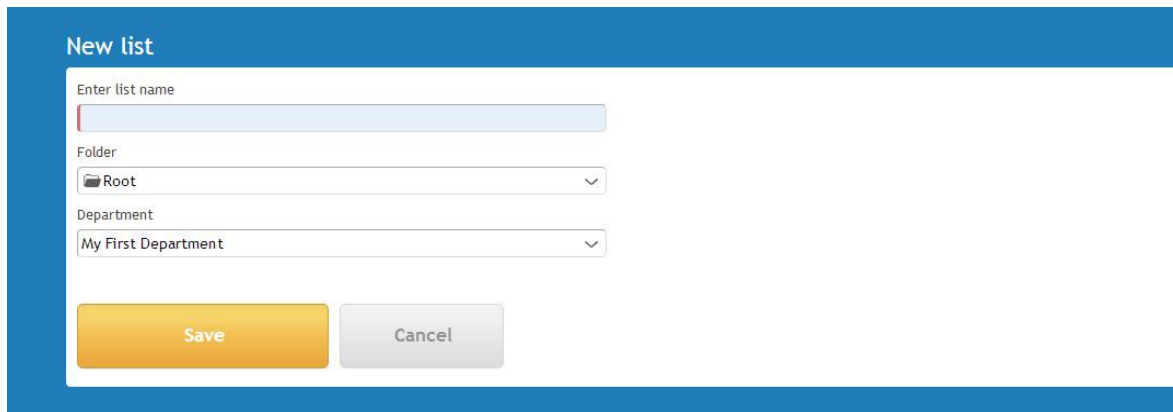
Enter the list name:

Image 1 - Creating a list

Selecting the import type

Please note, that just below your list name you can find various options that allow importing data into the **emailmanager**:

Import types:

Copy and paste
Copy and paste or manually enter a list of contacts you want to import.

Importing from Computer
Import a contact file (CSV or TXT) directly from your computer.

Importing from Gmail
To import contacts from Gmail, you should click on the Gmail icon and select the authorization button in order to authenticate an account.

Select the group of contacts you want to import and wait until **emailmanager** completes the process. Click: **Save and import**.

> **Done!**
> Your contact list was imported. Click again on Dashboard and go to the second step.

Step 2 – Send your campaign

We can describe "campaign" as a group of created components for disseminating products or services to customers.

There are four stages of creating campaigns on **emailmanager**:

Stage 1 - Configuration

Step one is to set up two types of information:

Campaign information

Campaign information is data that identifies your campaign.

Name

Name that identifies your **emailmanager** campaign.

Subject

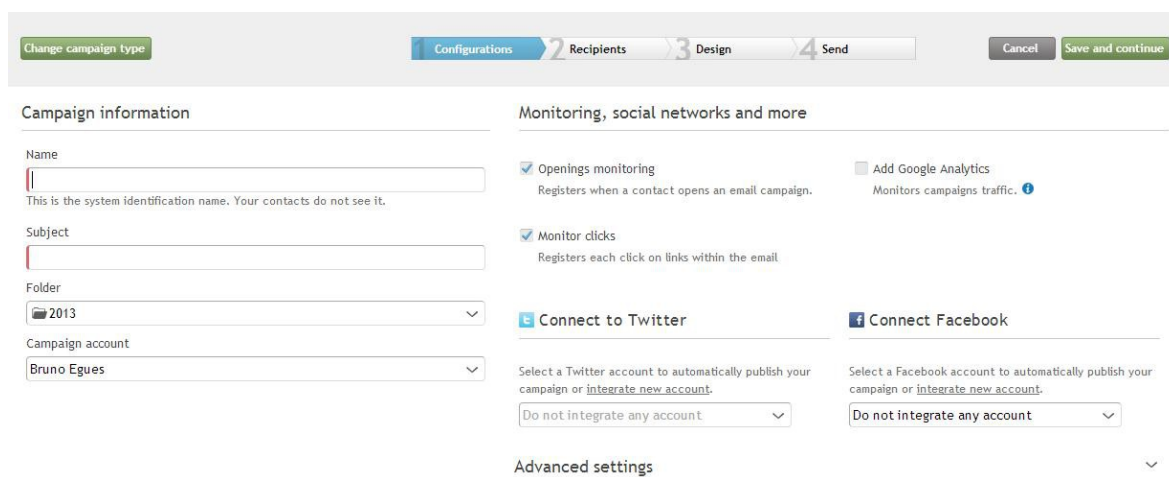Subject that identifies your email campaign.

Folder

Place where your campaign is stored. It helps organizing campaigns.

Sending account

Campaign sender.

Monitoring and social networks

Allows selecting the type of information that you want to track as well as social networks, in which you want to publish your campaign.

Image 1 – Campaign configuration

Integrating a social network

In order to publish your campaign on social networks (**Twitter** or **Facebook**), you should click the **"Connect to Facebook"** button or **"Integrate a new Twitter account"** link. Then an authorization form will be loaded and you will be able to enter your access data (please remember: emailmanager does not store your login details). The next step is to confirm your integration by clicking the **"Authorize emailmanager"** button. After you complete all these steps your **emailmanager** account will be synchronized with your social networks account and you will be able to start posting campaigns.

Stage 2 – Select recipients

You can choose and select recipients in 3 ways:

Included Groups
Groups that will receive the campaign.

Excluded Groups
The system compares contacts that are assigned to different lists, and blocks campaign delivery for these contacts
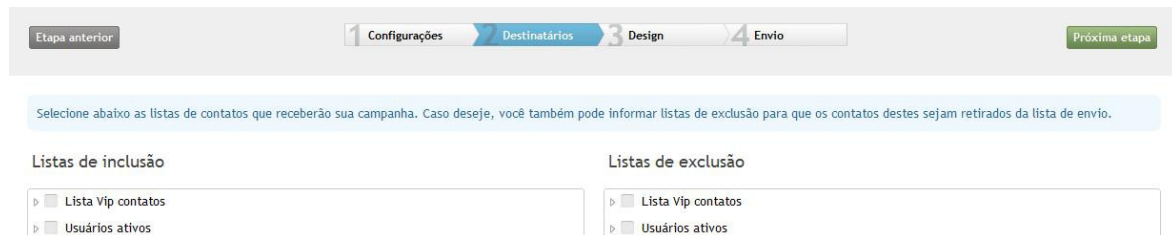

Image 1 - Selecting lists for sending

Using filters
Create a filter to segment your contacts list. This way you can group your contacts lists and use filters (instead of selecting lists).
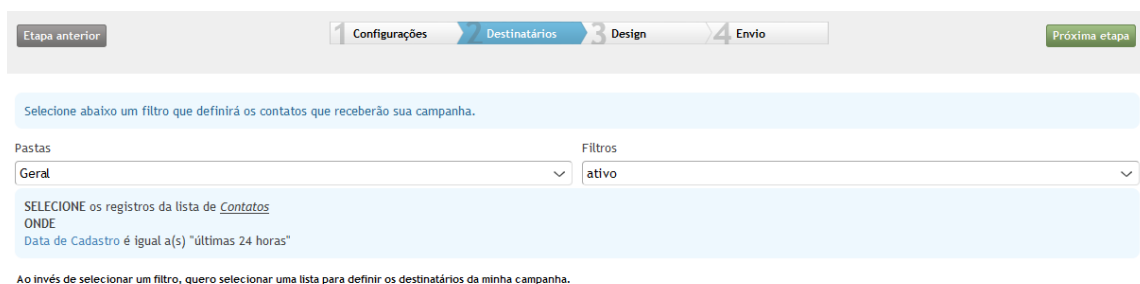

Image 2 - Using filters instead of list

Stage 3 – Design
There are five options for creating campaign design:
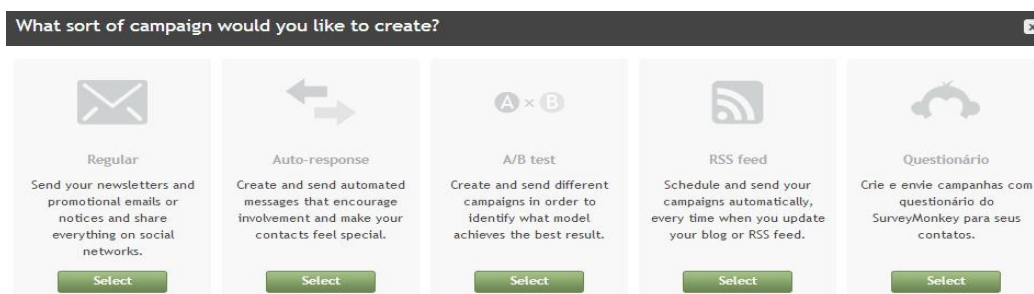

Image 3 - Templates options

Create a content
You can create a campaign as a plain text or edit an HTML content.

Code
Copy and paste your HTML code

Import HTML
Enter the campaign URL that you want to use.

Insert HTML from your computer
If you have created your campaign using an HTML editor installed on your computer, use this option to upload it.

Using Template
Select one of our ready to use templates.

To exemplify the campaign creation, you can use a ready template. To do so, select the **template** option.

After selecting it, you will see a template checkbox. Then, use the filter to select a category; choose a template that you would like to use and click it.
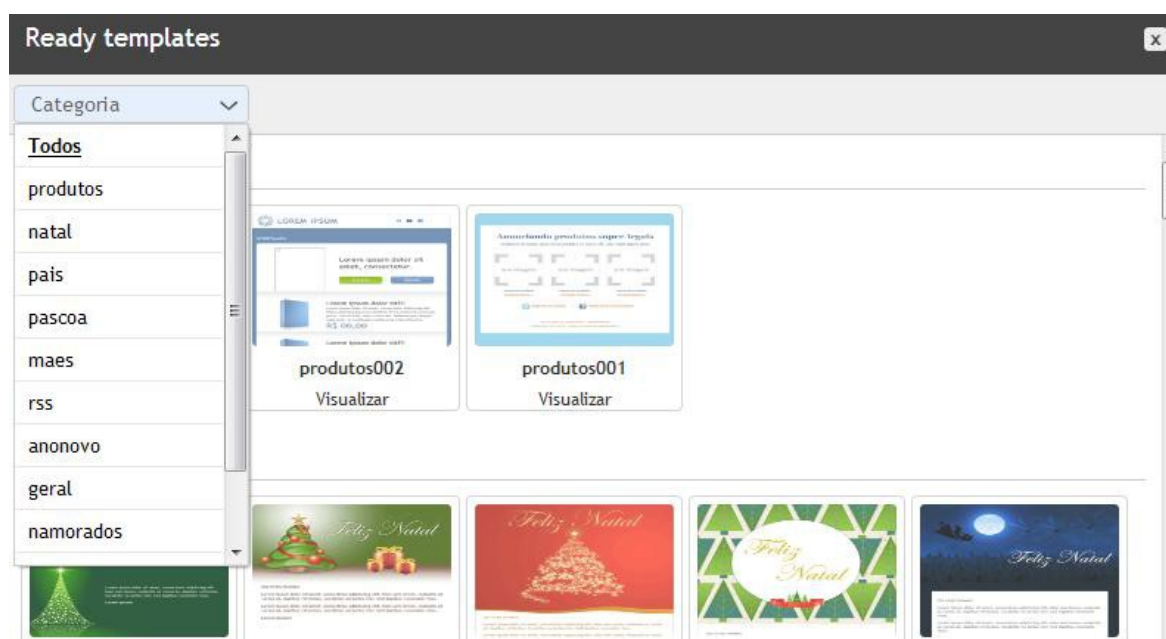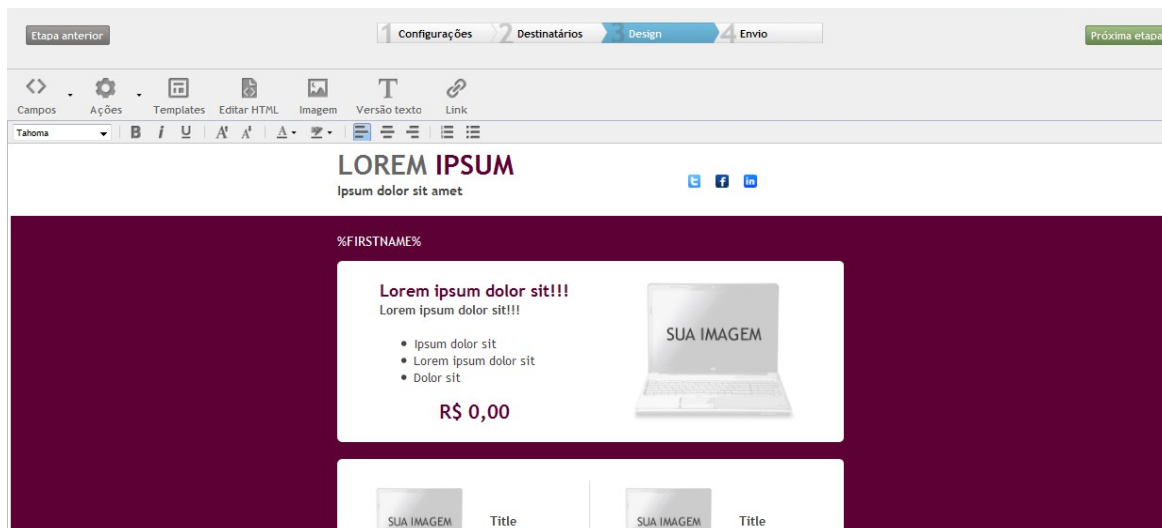

Image 4 – Using Templates

After clicking, the selected template will upload into Design guide.

To edit a template, simply click on the text and type a new content. In addition, you can use a toolbar to assist you in customizing the template (add data fields of your contacts, and select pictures). If you want to change the current template, just click on in.
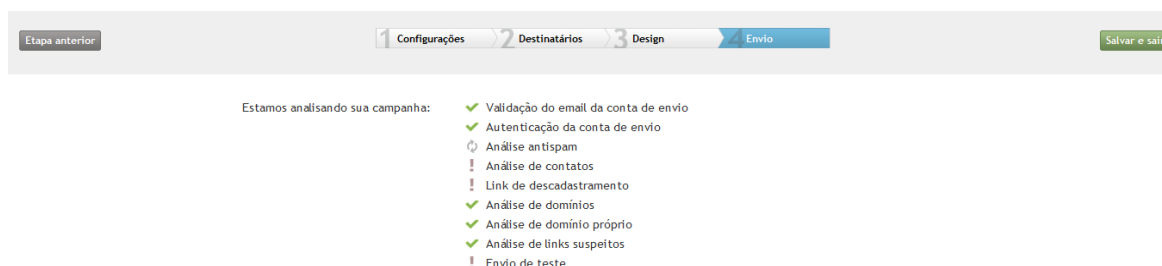
Image 5 - Changing template content

Bear in mind the ABEMD regulations. The unsubscribe link in your campaign is required. Add it using a **toolbar**.

Stage 4 – Dispatch

The last step is to validate the campaign data before sending it.

Your validations are listed below:

Image 6 - Validating sending data

Account email Validation
Validates selected e-mail.

Authentication of an account
Verifies the SenderID and DomainKey settings that are responsible for account authorization.

Anti-spam analysis
Analyzes and points out your campaign according to the criteria of SpamAssassin.

Contacts analysis
Verifies the contact list status. Displays a report about the current status of the list and presents the current number of active and inactive contacts list.

Unsubscribe link
Verifies if the link was added to the list.

Domains analysis
Verifies if the domain has no restrictions.

Domain analysis
Verifies if the domain is correctly configured.

Suspicious links analysis
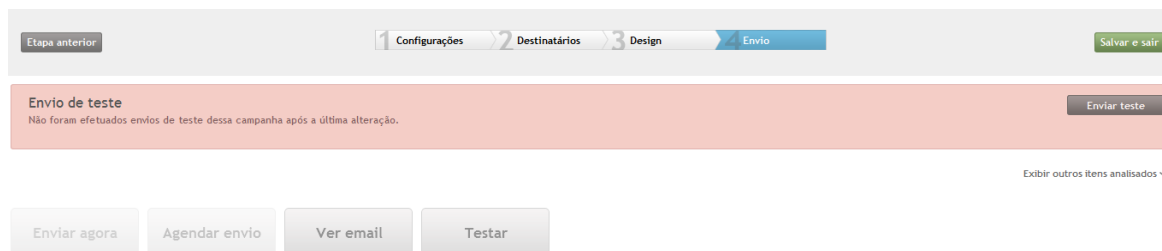Verifies if your campaign does not contain links that are considered as spam.

Image 7 - Validating details of the campaign

Testing
Allows to send a campaign content to one or more email accounts for test purposes. Note that, after validating the information about your campaign, all the items that did not comply with the required characteristics will be displayed in red. If you want to take a look at your campaign layout, simply click: **View email**.

In an example below you can see that the **Campaign Test** (required) was missing.

Image 8 - Campaign test
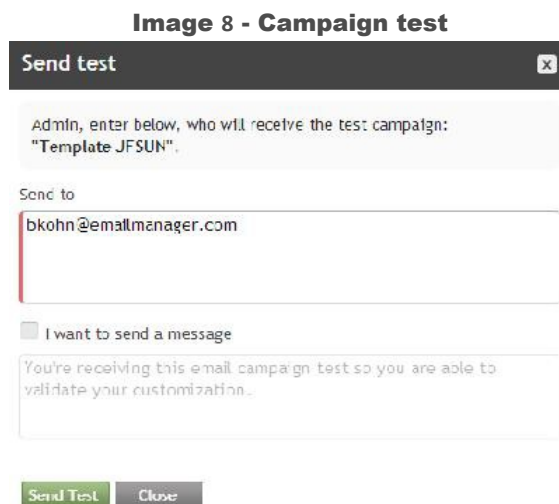
Enter the email address to send the test and click submit.

Finally you can select: **Send Now** and schedule campaign dispatch for a specific date and time, or just save for later.

Perfect! We registered our list, inserted contacts, created and sent campaign. Now it is time to monitor the results that will help us planning before our next campaigns. So, go back to the Dashbord and select the last step.

Reports understanding

Emailmanager reports are divided into three categories:

What are consolidated reports??

These are reports that unify a volume of information occurred in a given period:

Image 9 - Raports

Consolidated Summary – Shows a unified portlet of sending information and interactions for the selected period.

Consolidated Campaigns– Displays a list of sent information, errors, views and campaign interactions for the selected period.

Consolidated Unsubscription – Contacts list that has requested an optout option.

Consolidated Cancellation – Contacts list that has requested campaign cancellation.

Consolidated Denounces – Presents contacts that have denounced your campaign (after sending it to them).
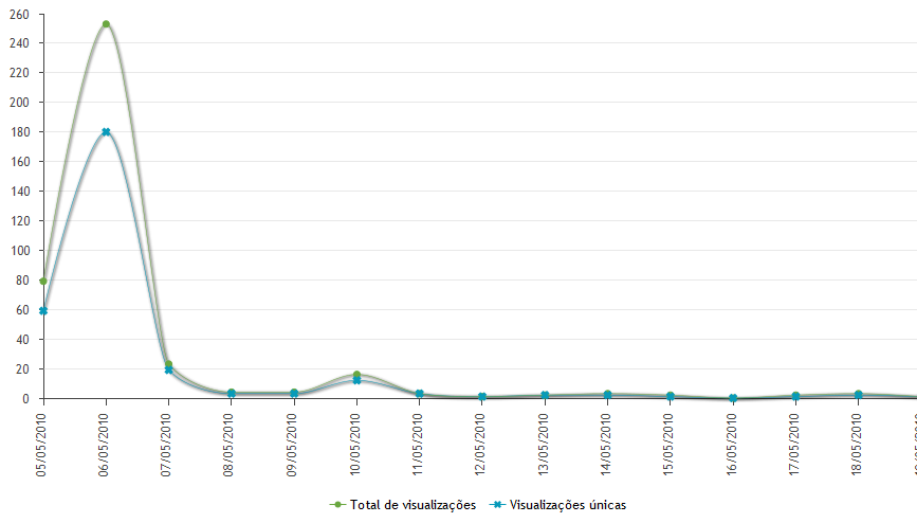
Campaign summary

The campaign summary presents a "table" with general and specific information about your campaign performance during the selected period. Take a look at the campaign reports:

Summary
Presents a general information summary about the campaign.

Interactions reports:
The campaign interactions report is subdivided into four types.

Views

Displays a histogram (graph) of total views that are relevant to the selected period.

Clicks

Displays a histogram (graph) of the total number or clicks that are relevant to the selected campaign.

Link clicks

Presents information about the clicks that your campaign received.

Referrals

Displays campaign referrals (number of views and clicks).

Contact interaction report

Lists information about individual interactions of each contact.

Contact without interactions report

Contacts list that received but did not interact with your campaigns.

Contact error report

Displays a list of errors occurred while sending your campaign (Bounce-rate).

Domain report

Displays a list of all the interactions made within a domain.

UserAgent

Shows information about contacts interaction.

Hot Hour

Controls the time of most of your contact interaction. It shows for example the time that your campaign reached the highest peak of interaction. The report consists of a **Hot Hour** timeline.

The **Hot Hour** timeline presents reports about the **DAILY** interaction of your contacts (ex. viewing and clicks)