



EmailOut.com - Quick Start Guide

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Interactive content

Click on the titles with the info symbol to open video or get additional information about the section.

Getting started - Summary i

Welcome to our email marketing platform, it's great to have you on board!

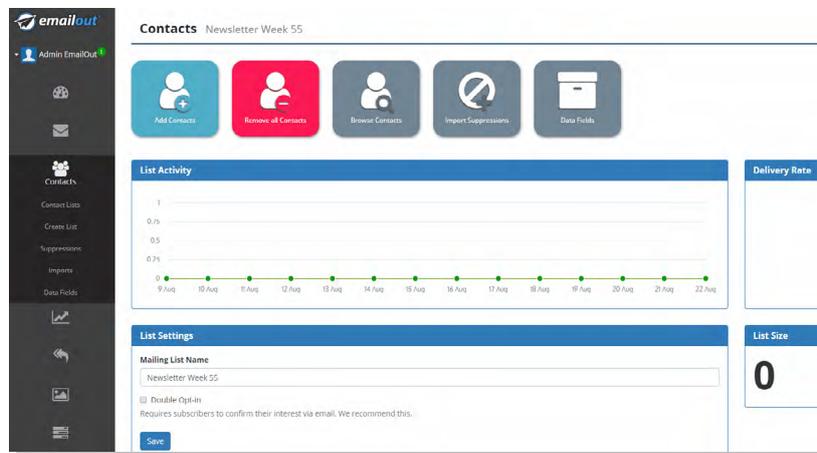
Our system enables you to manage all of your contacts' data and send out personalised great-looking emails with top quality reporting.

Add contacts to your account i

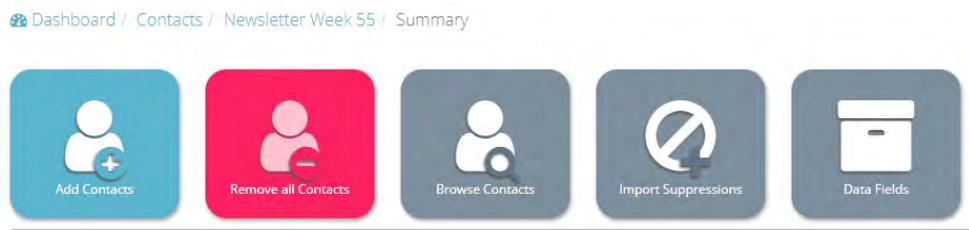
Every email address you store in your account is known as a 'contact'. Contacts can have all manner of data associated with them in addition to their email address, e.g. name, gender, birthday, where they live, their preferences and so on.

Contacts are stored in contact lists. These are used for organising your contacts and for choosing who to send campaigns to. Each contact in your account exists in one or more of these contact lists.

Go to **Contacts** -> **Create Lists**; give your list a name and choose the opt-in type. Don't forget to **Save** after you're done.



Now that you have created your contact list and saved it, you will be redirected to the 'Summary' page. From here you can do two things: **add contacts** and **create data fields**.

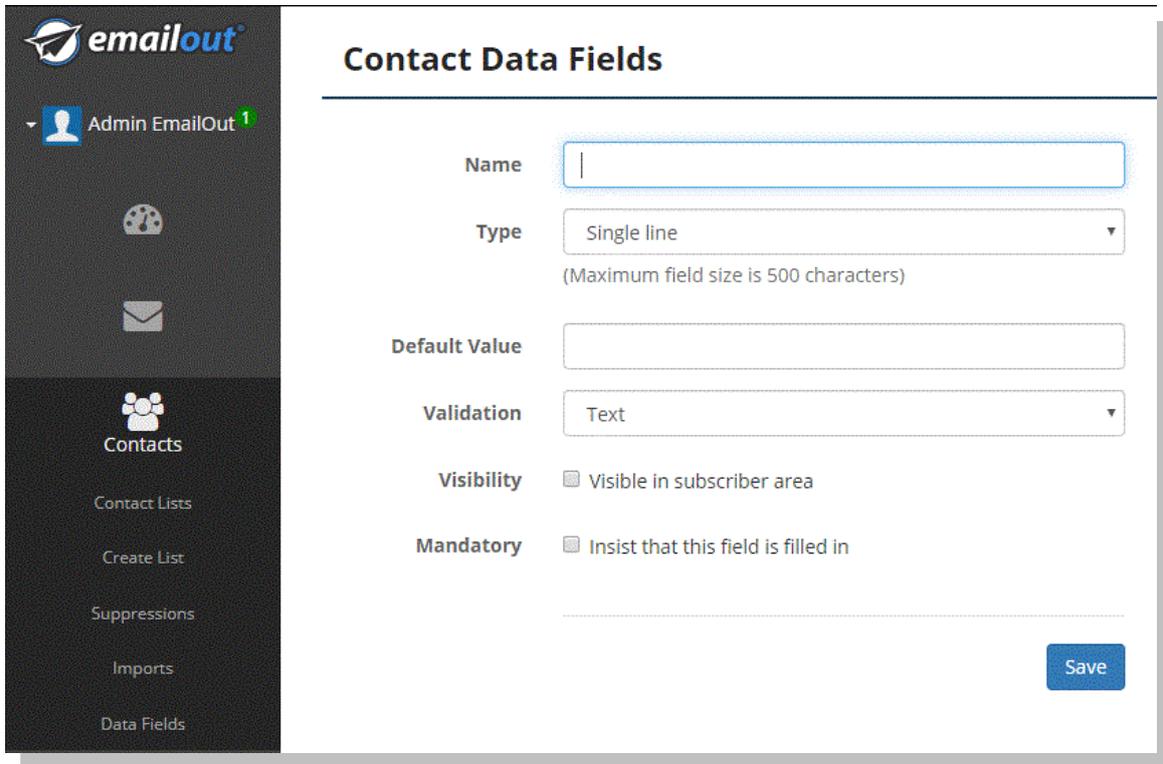


Before you start adding contacts, we **recommend** adding some *data fields* first. Such as first name, last name, company, telephone, etc. To do so, simply click on **Data fields**. You will, immediately, be redirected to the 'Data Fields' page. Then, just click on **Create field** and that's it - you can start adding data fields.



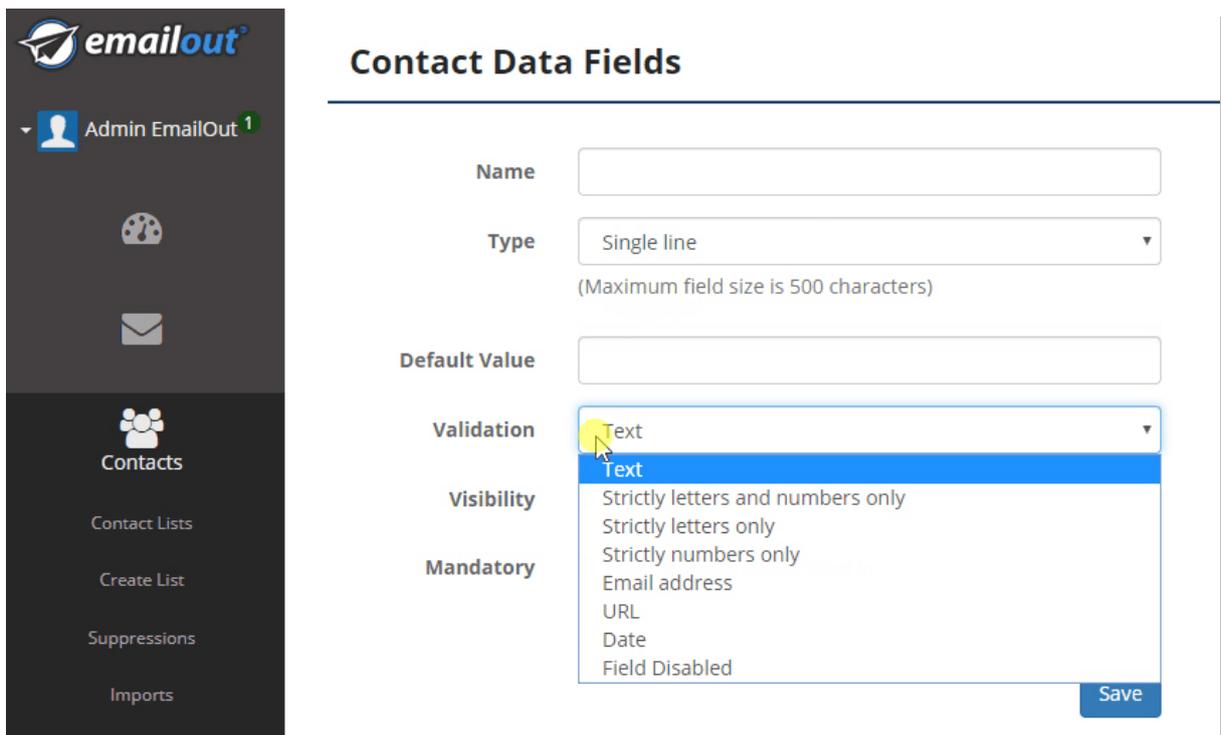
Before you start wondering how or what, we've already thought ahead. There are just a few easy steps and you'll have the data field created in no time at all.

There are six things you need to consider when creating a data field - its **name**, the **type**, the **default value**, **validation**, **visibility** and if it should be **mandatory** or not if you use it in data-capture form in future ('sign-up to our newsletter' for instance).



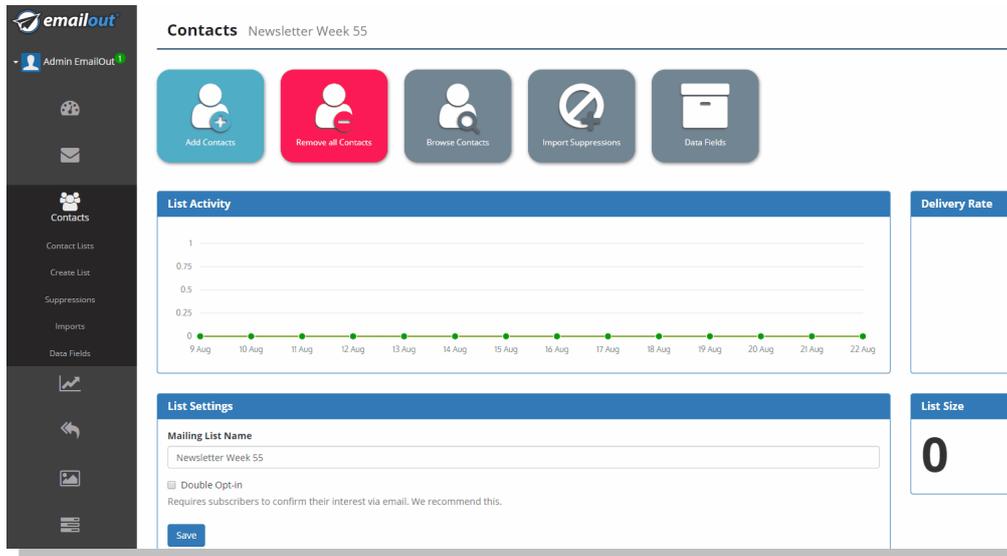
You can have *three* types of data fields - *single line*, *paragraph* and *date*.

As for **validation**, you can choose one of eight options - **text**, **strictly letters and numbers only**, **strictly letters only**, **strictly numbers only**, **email address**, **URL**, **date** and **field disabled**.



Now that you've created some data fields it's time to add your contacts.

Simply click on the large blue icon that says 'Add Contacts' and choose how you would like to import your contacts. You can either upload 'From File' or 'Copy & Paste'.

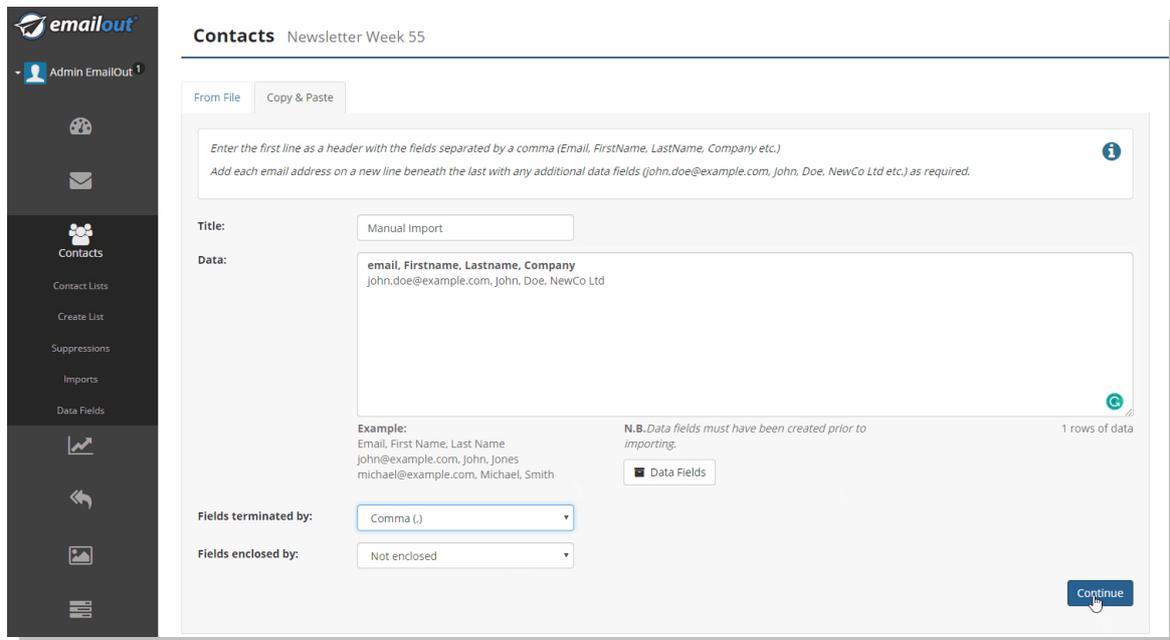


Adding your contacts manually i

(if you have an excel spreadsheet or .csv file you can skip this step)

If you are adding your contacts manually by choosing the 'Copy & Paste' option please note a very important step: Enter the first line as a header with fields separated by a comma (Email, Firstname, Lastname, company etc.) and then each email address on a new line beneath the last with any additional data fields (john.doe@exmaple.com, John, Doe, NewCo Ltd etc.).

You may import additional information such as name by terminating each field with a comma or semicolon (select below).



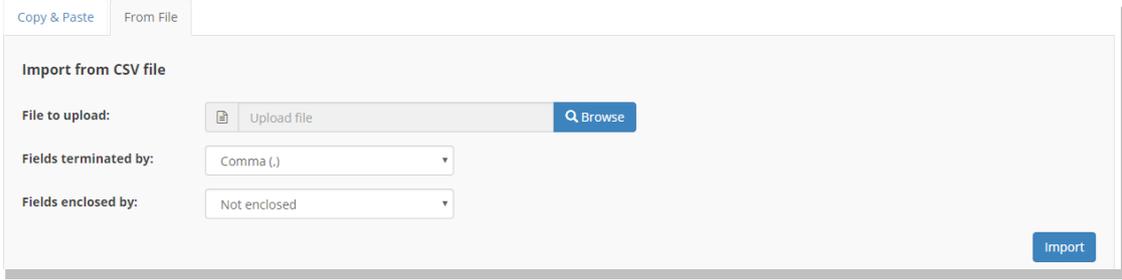
After you've done it just click **Continue**.

If this feels a little tricky the first time, don't worry, skip to the step below showing you how to simply upload a database file instead.

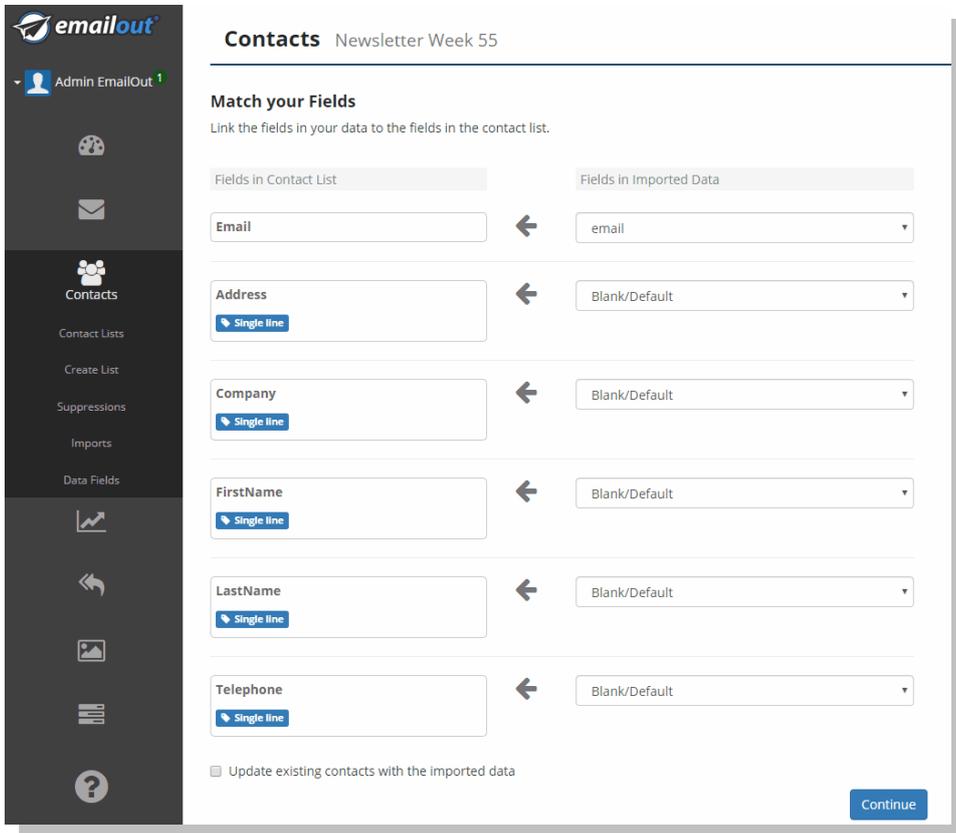


Adding your contacts 'From file'

Most of the time you will be uploading from a .CSV database file (it's important you always save your data as a CSV). Simply click on the 'From File' tab and then **Browse**. After you've selected the file you want to upload click on **Import** and that's it - for now.



Last but not least, simply **match the fields** from the contact list to the fields from the imported data using the drop down menu and hit '**Continue**'.



You will, then, be redirected to the '**Import**' page where you can see (download) the import reports - showing how many records were uploaded, which failed and which were removed by our anti-spam algorithms.

Creating a Campaign i

Go to **Campaigns** -> **Create Campaigns**. You will be redirected to our four-step process of creating a campaign. In Step 1: Campaign Settings, you will need to give your campaign a **name**, a **from address** and **from name**, a **quirky subject line** (you can personalise your subject line based on the data fields you've created) and a **preheader** text (some email clients, Apple products in particular, show the hidden preheader text before the subject line).

Campaign Settings « Previous **1** 2 3 4 Continue »

Campaign Name:

From Address:

From name:

Subject line: Personalise ▾

Preheader:

My Inbox

	EmailOut News Hi %Subscriber:firstname%Insert Quirky Subject Line Welcome To Our First Newsletter	Thursday 22nd August 2019 EmailOut News Hi %Subscriber:firstname%Insert Quirky Subject Line Welcome To Our First Newsletter
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After you have provided these details, click on **Continue** to go to Step 2: Campaign Creation which is where all the fun starts and you're about to get creative with making a stylish and one-of-a-kind campaign.

In Step 2, you can: **import** your own **HTML templates**, create your own campaign from scratch with our **Drag & Drop Editor** or, to get your creative juices flowing, simply use one of the many professionally designed free templates. Alternatively, you can use our classic **WYSIWYG** editor.

Campaign Creation Your First Campaign « Previous 1 **2** 3 4 Continue »

Drag & Drop Editor
WYSIWYG Editor
HTML Import
Generate Plain Text
Plain Text

Free Templates | Saved Templates

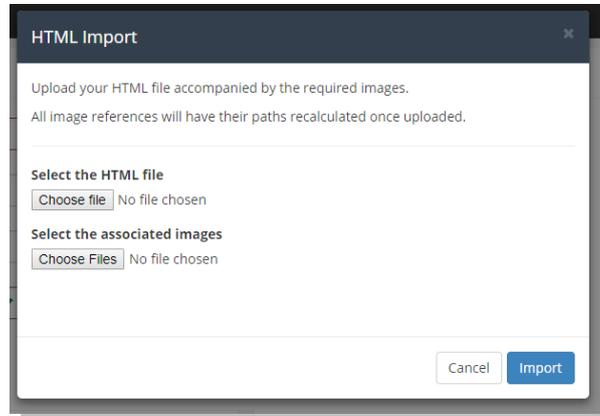
<p>Almost-Famous</p>	<p>Bakery</p>	<p>Corner</p>	<p>End-of-Season</p>	<p>Gadgets</p>
<p>Happy-Meal</p>	<p>Manhattan-Feedback</p>	<p>Manhattan-Thank-You</p>	<p>Manhattan</p>	<p>Priceless-Discout</p>

HTML Import

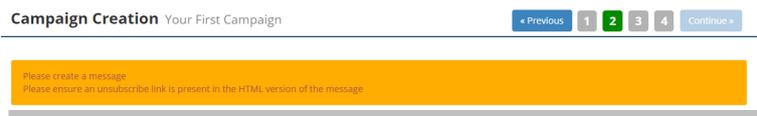
If you do not have your own Email Template stored on your computer, just skip to the next step.

If you choose to upload your own HTML template simply click on HTML Import.

When you see the pop up window please select the HTML file and associated images you want to upload. Then, just click **Import**.

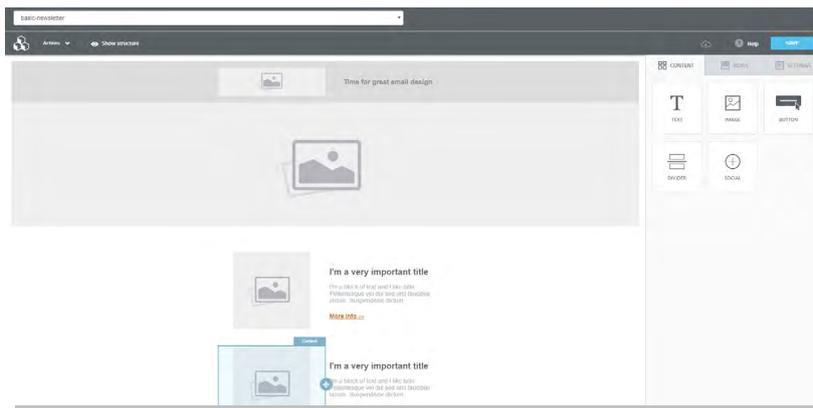


Important: If you are uploading your own template, you **MUST** add an EmailOut unsubscribe link. The application will prompt you to do so if you have forgotten. Please use the WYSIWYG editor to do so.



Drag & Drop editor

If, however, you have an amazing idea for your template and want to start from scratch, simply click on the green icon which says **Drag & Drop Editor**. You will be redirected to a basic newsletter template.

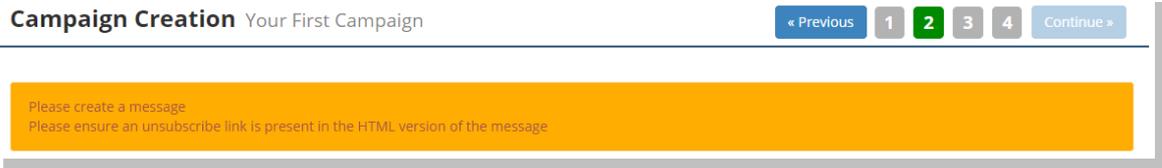


Then allow your creative juices to flow - detailed articles on how to use our Drag & Drop Editor and utilise all its functionalities can be found [here](#).

NB - Do **NOT** swap between templates once you have started editing or you risk losing your work. In order to ensure that will **NOT** happen click on 'save' periodically during your current progress. Once you have saved your progress the editor will 'lock' the template. If you want to work on a new template you will have to start a new campaign.

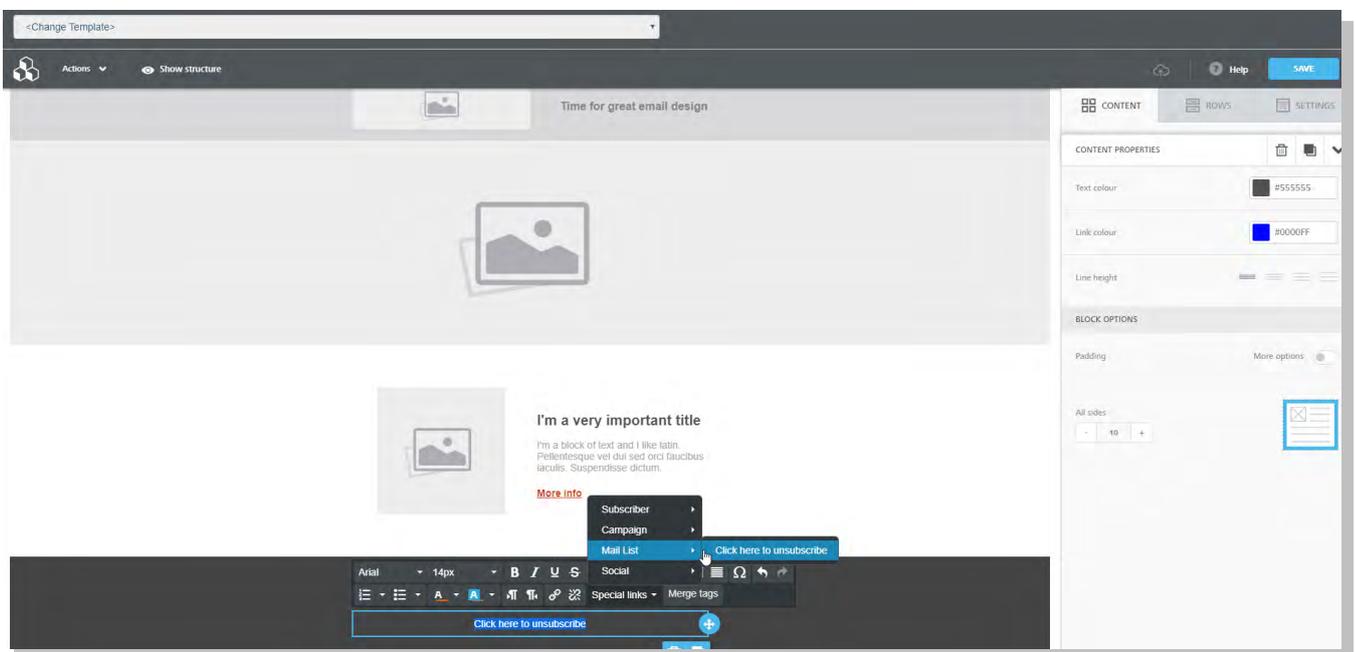
Adding an Unsubscribe Link i

All free templates in our library have an EmailOut unsubscribe link. However, if you have imported your own HTML template or create one from scratch, you **MUST** add the unsubscribe link manually, the application will prompt you to do so if you have forgotten.



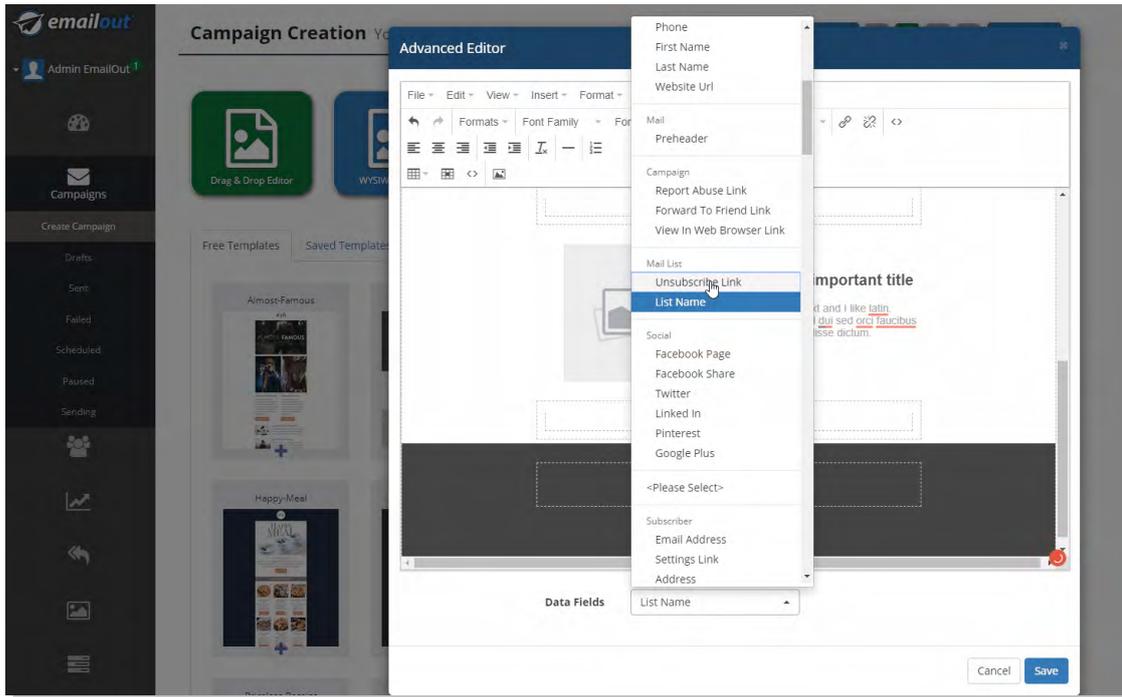
Follow these steps to add an unsubscribe link via the Drag & Drop Editor:

1. Go to the Drag & Drop Editor -> Add text block -> Double click on the element to edit/remove text -> Add Special Links -> Mail List -> Unsubscribe Link.



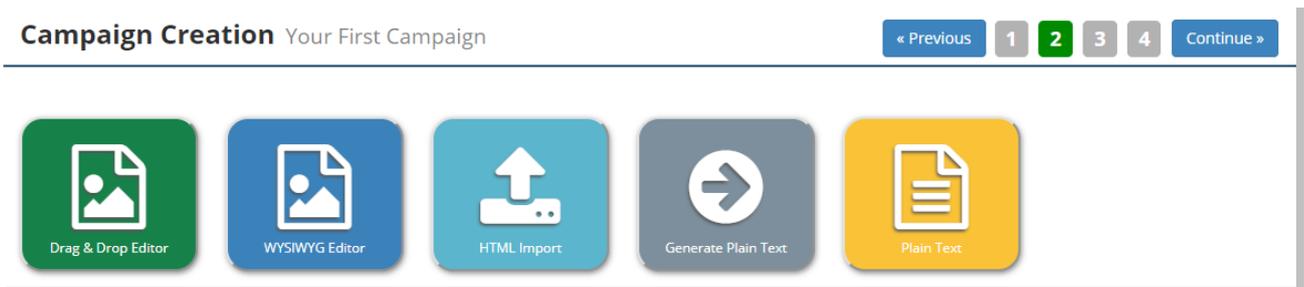
This is how you add an unsubscribe link via the WYSIWYG Editor:

1. Go to the WYSIWYG Editor -> Data Fields -> Scroll to Mail List -> Select UnsubscribeLink .



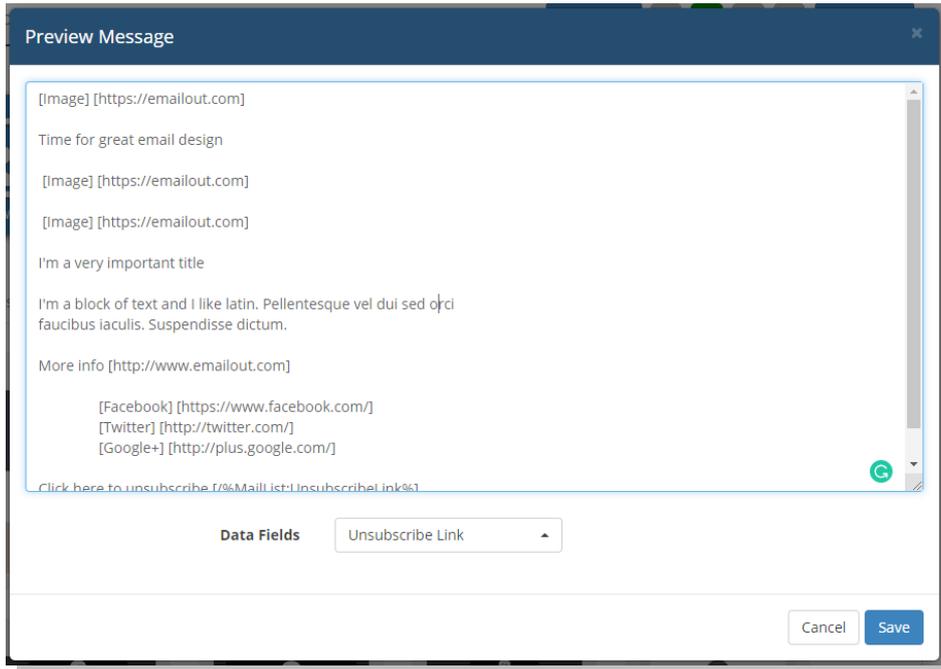
Your Plain Text version i

An important step when creating your campaign is generating the plain text version. Don't worry, your campaign will be sent as the pretty HTML version but however rare, some of your recipients might elect to get the plain text version - we've made it super simple to create. Just click on **Generate Plain Text** and that's it.



Plain text is regular text, with no special formatting options such as bold, italic, underline, or special layout options.

You can *preview* your message by clicking on the yellow Plain Text button. You will get a pop up window with the preview message.



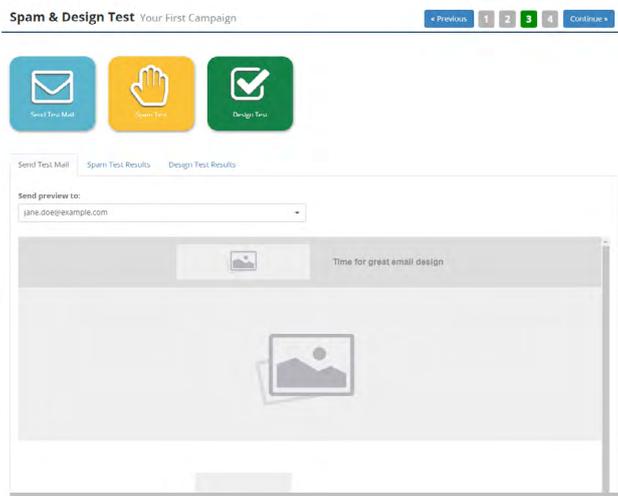
The system will prompt you to generate it if you still haven't done it.

Important: Having a plain text version with the same content as the HTML version will help improve deliverability of your emails.

Click **Continue** to Step 3.

Test your campaign i

Once you're happy with the design of your campaign and before emailing it out to your contacts, it's important to test it thoroughly. This is where Step 3: Spam & Design Test comes into play.

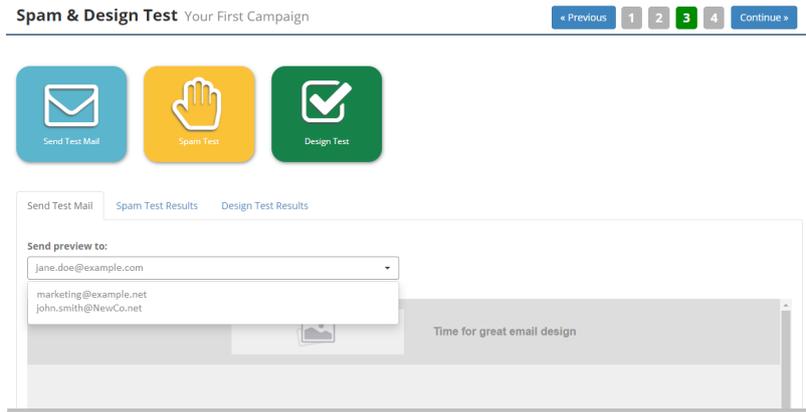


Testing allows you and your colleagues to proof your email, to confirm that it contains all of the expected content, and they can give you feedback about what it looks like in their different email clients and devices.

The platform provides testing tools for you. After creating the content of your HTML and plain text versions of your campaign, you can: Send Test Email, request Spam Test and Design Test and all from one place. More on using spam and design testing [here](#).

Preview Test

Send a preview to you and your team by selecting an email address from the drop down list.



The subject line will be **prefixed with [Preview]** followed by the subject line and the tracking will not be enabled as this would be only a preview test.

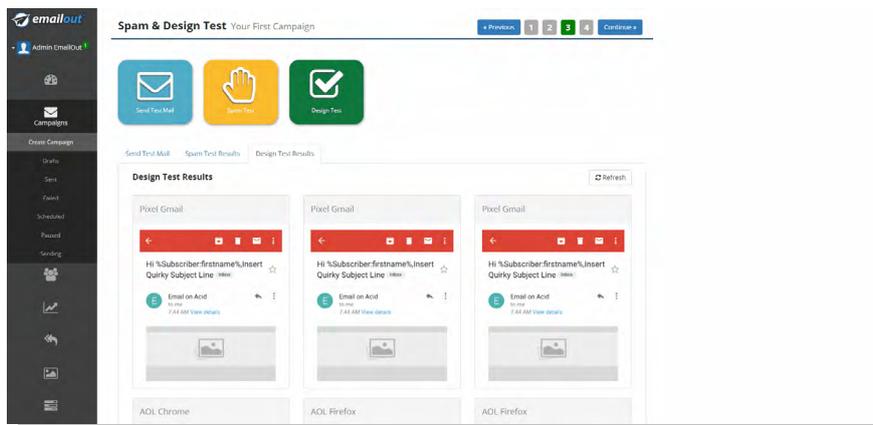
Design Test

Emails render differently in every email client.

Our **Design Test** allows you to preview your email campaign in over 70+ different email clients and mobile devices in seconds.

In order to see the results, you just need to click on the green **Design Test** button.

This will automatically take you to the design test results section. In case the thumbnails are not available - 'awaiting image' - just click on the *Refresh* button at the top right.



Note: Please note the results preview might take a few seconds!

Spam Test

Keep your email out of the spam folder, no matter what email provider your recipients use.

In order to spam test your campaign you only have to perform one single step - click on yellow **Spam Test** button and it'll automatically take you to the spam test results section.

Your campaign is passed through a spam filter and is scored accordingly.

The spam test will test your email against 23 of the most popular spam filters. In your final report you will receive pass/fail feedback in Google Apps, SpamAssassin, Barracuda, DKIM, Gmail, Outlook, SPF and many more.

Spam & Design Test Your First Campaign

« Previous 1 2 3 4 Continue »

Send Test Mail Spam Test Design Test

Send Test Mail Spam Test Results Design Test Results

Spam Test Results Refresh

Passed	Symantec Cloud	Score: 0.2
Passed	Barracuda	
Passed	Cloudmark	
Passed	Symantec Messaging Gateway (formerly Brightmail)	
Passed	Google Apps	Passed all Google App filters.
Failed	Gmail	
Failed	Outlook.com	
Passed	Yahoo	
Passed	AOL	
Failed	Outlook 2007	
Passed	Outlook 2010	

Note: Please note the testing requires some time and 'pending' status will appear next to each test. Please click 'refresh' to preview the spam results which are ready!

Click **Continue** to Step 4.

Sending a campaign i

Now that you have created a beautifully unique campaign, let's send it. You can do so in Step 4: Select List & Send.

The screenshot shows the 'Select List & Send' interface for 'Your First Campaign'. At the top right, there are navigation buttons: '< Previous', '1', '2', '3', '4' (highlighted in green), and 'Continue >'. Below this, there is a 'Permission' section with a 'View/Agree' link and the text 'Please agreed to the Terms and Conditions'. The main area is divided into 'Lists' and 'Segments' tabs. Under 'Lists', it says 'You may select multiple lists' and lists two options: 'Newsletter Week 55 (1)' and 'EmailOut Team (2)'. Below the lists is a calendar for August 2019 with the 22nd selected. To the right of the calendar are fields for 'Time zone' (set to 'Europe/London'), 'Time' (set to '00:00'), and 'Scheduled for:' (set to 'not scheduled'). At the bottom right, there are three buttons: 'Schedule' (blue), 'Send Now' (red), and 'Save as Draft' (green).

Recommended: you may wish to send to an internal test address database before a live send to your customers.

Don't forget to view (and read!) the Terms and Conditions and agree.

You have three options presented. You can either **schedule** the campaign by setting date and time, **send now** (immediately) or **save as draft**.

If you decide to **schedule** your campaign make sure to select the correct **time zone** and then **time**. Afterwards, just click on the blue schedule button and that is it, your campaign is scheduled.

This screenshot is similar to the previous one but shows the 'Schedule' button highlighted in blue. The 'Time' field is now set to '15:30' and the 'Scheduled for:' field shows '2019-08-22 15:30:00' with a clock icon.

If, however, you decide to **send now** click on the red button. You'll be prompted to confirm this is what you want to do, just click **OK**.

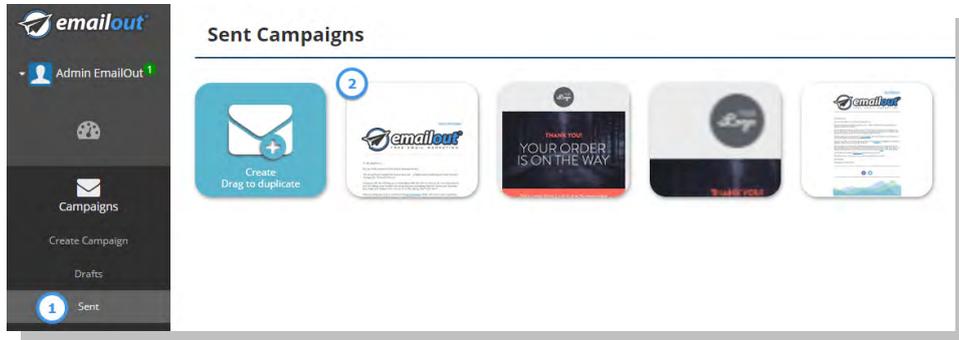
The screenshot shows a 'Send Campaign' dialog box with the text 'Are you sure that you wish to send the campaign immediately?'. At the bottom right, there are two buttons: 'Cancel' and 'OK'.

And, if you do not want to send the campaign for any reason just click the green **Save as draft** button and it'll be stored in your Draft Campaigns section.

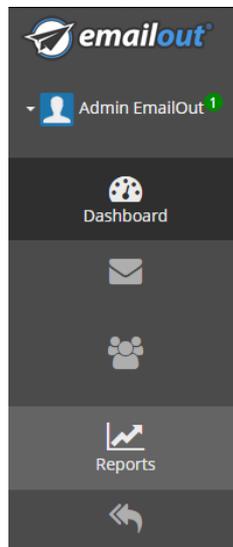
Campaign Reports i

You can get detailed reports on how your campaigns have performed.

A campaign's report can be accessed by clicking on 'Campaigns' -> 'Sent' (1) and clicking on the sent campaign's thumbnail (2).

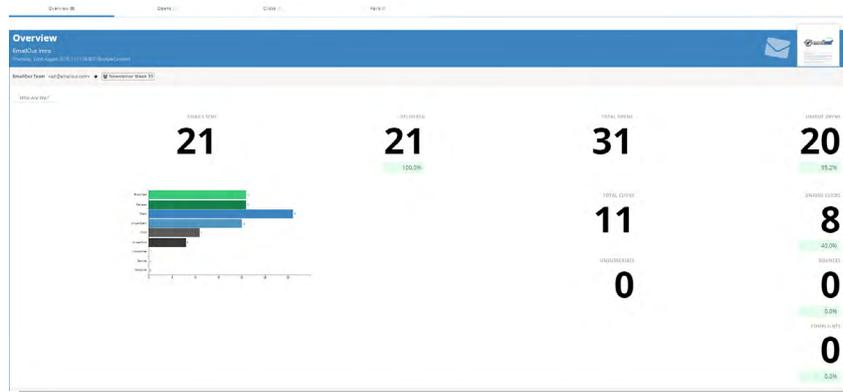


You can also access you campaign reports by clicking on Reports menu which is located on the left hand-side just below Contacts.



Campaign overview statistics

The campaign overview statistics show top level statistics for each of the below key metrics.



Delivery

Emails sent

This report shows how many emails in total have been sent for this particular campaign.

Emails delivered

This report shows the number of emails that have been delivered to their intended recipients. If there's a difference between the number delivered and the number sent, this difference will relate to the hard and soft bounces shown further down the reporting list.

Engagement

Total opens

This report shows the sum total of all opens for the campaign whilst unique opens represent the number of unique individuals that opened the email.

Unique opens

This report shows the number of emails tracked as being open. This is a worst case scenario, as not all email clients or business email servers allow emails to be tracked by this metric.

Non openers

This report shows recipients who haven't opened your campaign.

Interaction

Total clicks

This report represents the sum total of clicks for a campaign whilst unique clicks represent the number of times users clicked on the link for the first time.

Unique clicks

This report registers the unique number of recipients who've clicked links in your campaign. This report shows the total number of link clicks. This includes recipients who've clicked a link more than once and/or different links.

Removes/Fails

NB Currently hard and soft bounces results are grouped under **Bounces**.

Hard bounces

This report shows the number of permanently undeliverable email addresses. This will be because they're incorrect or no longer in use.

Soft bounces

This report shows the number of temporarily undeliverable email addresses. Generally, this will be because of 'out of office' or 'mailbox full' replies.

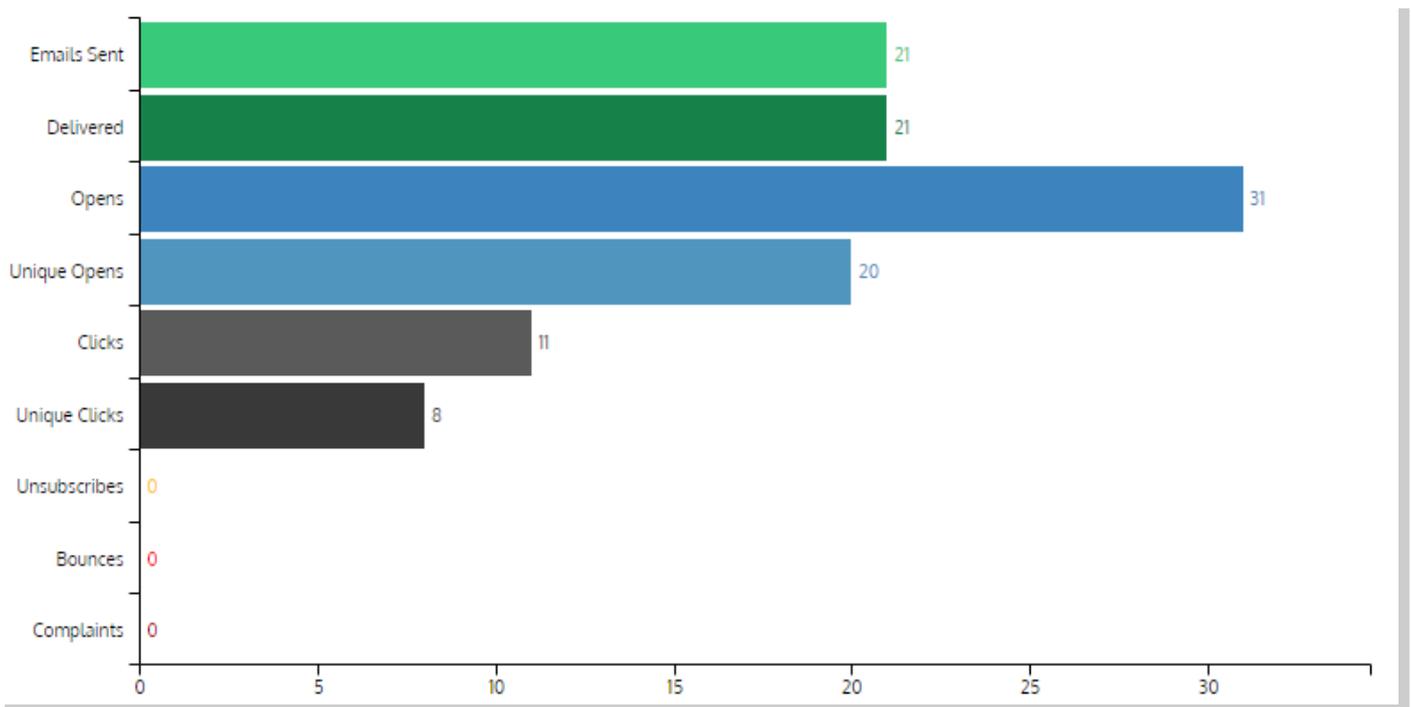
Unsubscribe requests

This report shows how many recipients have asked to be removed from your contact list(s). These addresses are automatically removed from your address book(s) so that they can't be emailed in the future. This would apply even if these email addresses were included in a future upload to the same or different address books. They'd be automatically excluded from the upload. The **Suppressed contacts** option under **Contacts** provides a list of all addresses permanently removed.

Click complaints

This report shows the number of ISP (Internet Service Provider), complaints that have been registered against you by your recipients.

In the campaign overview, you can also view your reports in a **graph** format.



Congratulations on sending your first campaign!



NOTES