User Guide: Build an Email Message

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In Act-On, you can create messages easily, send them with confidence, and track your results. You can link your messages to forms, landing pages, webinars, documents, and more. You can create a series of messages to be sent out automatically as part of a drip or nurture program, and you can use dynamic content to personalize a single message to different segments.

This guide explains how to generate, send, and track an email message in Act-On, and shows you how to make the most of additional capabilities.

GENERATE A NEW MESSAGE OR TEMPLATE

Act-On gives you three different ways to create a new email message.

Option 1: Create a new email campaign

1. Go to the Home page, navigate to the Message menu and select New Message from the drop-down list. There are six options available for crafting a new message. (These same options will be available when you create a template.)

2. Start with a Blank Message will open a blank new message.

3. Start from a Draft Message will let you access messages you have saved in draft mode. You will see all the drafts you have available to work from. Select one, and you will be shown a preview of that message. If it is the correct one, click Next. If not, click Back to see other drafts.

4. Start from an Existing Template takes you to the page that displays templates organized in folders. Make your selection and a preview will appear. If it's the right one, click Next to place it in draft mode. If not, click Back to see other templates.

5. Start from a Sent Message will open up Sent Messages, a chronological list of the messages sent, listed by the subject lines. Once you find the message you want to repurpose, click Next to place it in draft mode.

6. Under More Options, click Upload a Pre-Designed Message if you want to upload a custom, externally designed HTML message.

7. Also under More Options, click Create a Plain Text Format Message to build a plain text message with no HTML formatting.

> **NOTE:** There is a difference between HTML code for web pages and for mail clients, so make sure your HTML code is email client compatible.

Document shortcuts

- Generate a New Message or Template

- The Act-On Message Builder

- Message Builder Step 1: Compose

- Message Builder Step 2: Address

- Message Builder Step 3: Review

- Message Builder Step 4: Send

- Message Reports and Analytics

- Terms to Know

Option 2: Create an email template

There are significant advantages to using templates. If you create a message which will be sent out repeatedly, creating a template will *save time*. You can also create and name folders to store message templates in. Such organization makes it *much easier to find* the email you want.

1. On the Home page, navigate to the Library main menu and select Templates from the drop-down menu.

2. Click New Template. A window opens up giving you the options of making a template from scratch; starting with a draft; starting from another template; or starting from a Sent Message.

3. Click More Options if you want to upload a custom- designed HTML message or if you want to build a plain text template.

Option 3: Repurpose a previously sent message

Method 1: On the Home page, go to Recently Sent to see the subject lines of your most recently sent messages.

1. Click any subject line to go directly to the message analytics for that campaign.

2. Click the Message tab to view the message and verify that it's the one you want.

3. Click New Message. This will automatically make a copy of the sent message and put it into Draft mode.

Method 2: If the message you want to repurpose is not in your Recently Sent queue, go to your Quick Start Menu and click on Email Campaigns.

1. This defaults to the Sent listing under the Messages menu.

2. Your Sent Messages will be listed in chronological order, from the newest down to the oldest, depending on the time frame you have specified.

3. Hover over the Sent Message and select New. This automatically makes a copy of the Sent Message and puts it into Draft mode.

THE ACT-ON MESSAGE BUILDER

Four easy steps to create and send a message:

1. **Compose**. Create the content of your message here. In this step you also have many options for testing your message.

2. **Address**. Select the individuals or groups of people you are sending the message to.

3. **Review**. Send your message through a validation process for basic content check. Check for personalization errors, see individual previews, and check Spam Score and Account Limit.
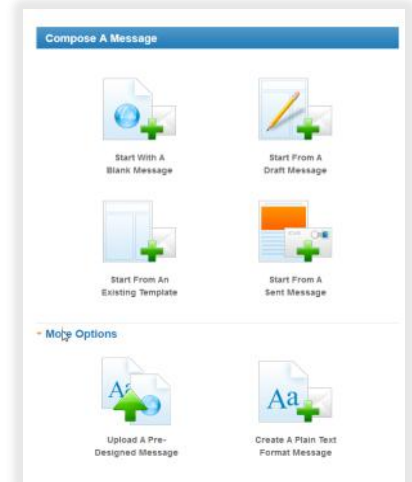
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4. **Send.** You can send your message immediately or schedule for a later date and time.

MESSAGE BUILDER STEP 1: COMPOSE

Act-On supports your message-building creativity in many flexible ways.

1. **First, fill in the top part of your message.**

   1.1. The default From address (selected as the default email address in your Account>Users>From Addresses) will automatically be shown in the From field. If you have not set a default From email address, the field will be filled by the email address associated with your user login. If you have additional email addresses set up (Account > Users > From Addresses), click the drop-down list to see them and select one.

      a. If your Act-On account is integrated with Salesforce, you can select "Salesforce Owner" to send the email from

      b. Act-On will place the Salesforce record owner's name and email address in the From field (This option is available when sending your message to a list imported from Salesforce)

   1.2. In the Reply To field, click on the drop-down menu and select from your list of qualified additional From addresses if you want this to be different from the From email address.

   1.3. Add a Subject line.

   1.4. Choose your Stationery. If you have established a default stationery (in Account > Branding>Stationery), it will automatically be applied. To choose a different stationery, click the drop-down menu to see all available and choose one.

   1.5. The box to the right of Stationery is Logo. If you have established a default logo (in Account > Branding>Logo), it will automatically be applied to the message. If you have multiple logos, click the drop-down menu to see all available and choose one. You may also select No Logo.

   1.6. Choose a Font. The box to the right of Font is for determining the font Size. These defaults you specify will apply to any text that Act-On generates. However, when you use the Rich Text blocks to create the body of your message, you will be able to selectively override whatever formatting is set here.

NOTE: The fields and drop-down menus for Stationery, Logo, Font and Size are also found in the builders for forms, landing pages, and templates.

2. **Fill in headers and footers**

   2.1. There will be a default Header (e.g., *View this message in a browser window*) included at the top of your message. If you have created custom headers (in Library>Headers), they will be available via the drop-down menu. You can also choose to suppress the header.

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2.2. At the very bottom of the message, your selected default Footer will appear. Similar to the header, custom footers you have created (in Library>Footers) will be available via the drop-down menu. You can also choose to suppress the footer.

About the opt-out link

- If you choose to suppress the Footer, you need to ensure (for CAN-SPAM compliance) that you do include your corporation name, a physical mailing address, and a clearly marked opt-out link somewhere within the body of your message. The Act-On system will not send a non-CAN-SPAM compliant message.

- To insert your opt-out link outside of the Footer, edit a Rich Text block and choose the Insert Personalization Field icon on the toolbar.

About Smart Content Blocks

In Message Builder**,** Smart Content Blocks are pre-formatted templates that make it easy to add specific types of content.
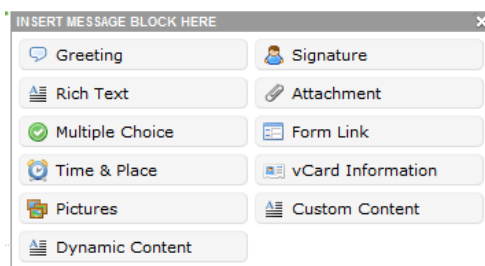
- The **Greeting** block. Click to define how your **Greeting** will look; choose a generic greeting to display in place of missing names.

- The **Rich Text** block. Hover over a **Rich Text** block and click **Edit**. This will open up a WYSIWYG editor. If you're familiar with MS Word, you will be familiar with most of these icons. When you mouse over any of the icons in the toolbar, a brief description of the function will appear. (See also the **Rich Text User Guide** for full directions.)

    a. The Personalization feature is especially useful. It lets you inject variables to personalize your message for each recipient, or place system links for *Opt-Out* and *View in Browser* into your message.

    b. First, go to the rows of icons at the top of the Rich Text Editor and select the icon that allows you to **Insert Personalization Fields**.

c. The dialog box that opens displays the available personalization fields. Your options are *Recipient*, *Sender,* or *System*.

d.

e.

Insert Personalization Fields

| Recipient | Sender | System |

Insert Recipient Personalization Field

○ From standard field names
○ From specific list or segment

--select field name--

Optional: Enter generic text to display if your recipient doesn't have a value for the field above:

✓ Insert   ✗ Cancel

i

i. *Recipient*: Choose *From standard field names*, or click *From specific list or segment* to drill down into a specific list and choose among its fields. You can also create generic text to display when a record's field is empty. Click *Insert*.

ii. *Sender*: Choose a field in the categories of *Message sender*, *Salesforce Owner* (these values currently work only for Salesforce CRM), or *Account User*. Click *Insert*.

iii. *System*. Use this to inject *Opt-Out* and *View in Browser* links wherever needed. Click *Insert*.

• The **Multiple Choice** block. You can easily create a simple form; just enter a prompt and a set of choices. There are additional options below. If you need to add more questions or insert different types of formats, such as drop-down lists or paragraph text, please make sure to use Act-On's Forms feature to adequately build out your questionnaire or survey.

• The **Time & Place** block allows people to download event details to their calendars. Click **Edit** to modify the event details. then click **Done**. When people receive your email and hover over the Calendar icon, they can download all the meeting details to their calendars.

• The **Pictures** block provides access to your **Images Library**; you can insert up to two pictures per Smart Content Pictures block. (You can also insert images into a Rich Text Block via the Image icon.)

• **Dynamic content** allows you to create one message, and define entire sections of your message – including text, links and graphics – that will display differently for recipients depending on profile attribute rules you define. This allows you to launch a single message to your entire marketing list and still provide targeted, relevant information for each contact. It also allows more customized responses from a single confirmation email associated with forms or automated programs.

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- The **Signature** block. Click the **Edit** button to see all the signatures generated in the Account > Branding>Signatures area. You can select any of them to insert into your message.

- The **Attachment** block. Here you can add a document or media link, give it a clickable display name or choose a graphical button, and set an optional download expiration date.

- The **Form Link** block. By default, your form name will appear as a blue button, but you can choose to give it a different label. You can also choose a graphical button to appear instead. The button will appear prominently in the center of your message.

  Depending on the form or the media link you want to include, if you want that prominence then you might consider inserting the form link or attachment in its own block. These links may also be inserted directly into the text in your **Rich Text** or **Dynamic Content** blocks.

- The **vCard Information** block is great for distributing contact information. For example, if you are having an upcoming event featuring a guest speaker, you can include their contact information and make it available for download. First, select **Edit**. Type in the contact information you want to share, then click **Done**. The vCard and all its details will appear on the message, and people can download it to their contacts.

- The **Custom Content** block. Use this block to upload or insert preformatted HTML code. When you select this block, a pop-up will appear, offering uploading options. Once uploaded, the HTML codes will appear. You can make edits to your HTML code here, or you can select **Open Rich Editor** and make edits that way. Once complete, make sure to click **Done**.

In a new blank message, by default, you have three **Smart Content Blocks**. When you hover over any of these blocks, four standard options will appear: **Edit**, **Delete**, **Move**, and **Insert Block Above**.

- **Edit** allows you to create and modify content.

- **Delete** deletes the block and all of its content.

- **Move** allows you to drag and drop blocks so you can reposition content.

- **Insert Block Above** allows you to insert a new **Smart Content** block.

3. **Fill in the body of your new blank message**

   3.1. Click Greeting, and determine your choices.

   3.2. Hover over a Rich Text block and click Edit.

   3.3. Where it says Enter text here, you can simply type into this space.

   3.4. You can link to collateral you have uploaded, such as images and

NOTE: When you send out a test message, your message remains open in draft mode, so you can keep making edits to it.

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documents, or collateral you have created, such as forms and Landing Pages.

    a. For example, to link to a form, simply choose the icon to **Insert Link to an Act-On form**. You can preview the form to ensure it's the right one.

    b. You can choose to prefill. **Prefill** allows the system to auto-populate data on the form if the data exists on the list you are sending to.

3.5. Build out the body of your email, using additional Smart Content blocks as needed.

3.6. In the Signature block, choose a signature. (Signatures are created separately in Account > Branding > My Signatures and Account Signatures. Click Done.
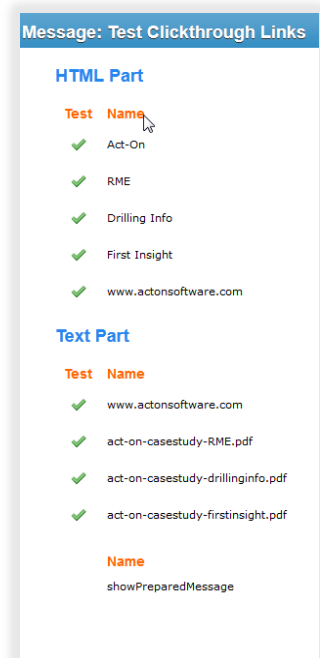
4. Preview and test your message

4.1. Select Preview to see the message without the block headers. It will show you both the HTML and text versions the way your recipients will see it.

4.2. The Tests option gives you a variety of testing capabilities.

    a. Select **Send Test Message** to send a test message to yourself, your Test List, or any segments you have under your Test List.

    b. If you haven't created a test segment, you can specifically select individuals from your Test List to send a test message to. Your Test List can be modified by going to Lists > Account Lists.

       When sending out a test message, consider opening it up in different browsers and different mail clients, such as Hotmail, Gmail, Yahoo, or AOL, so you can see how your images and text are being rendered and interpreted. Each mail client and browser will interpret your HTML code differently, and you'll want to see what the end result will be.

    c. Select **Test Clickthough Links** and the Act-On system will automatically test your links in both the HTML and Text version of your message, and show you if the links are valid or if any are broken. Clicking on the blue arrow to the right will allow you to view the URL. When completed, click **Done**.

    d. If you have a Litmus account, select **See Appearance in Various E-mail Programs** to push your email through Litmus account. Establishing an integration between Act-On and your Litmus account can be done by going to Account > Connectors > Litmus. If you do not have a Litmus account, you will not see this testing option.

Message: Test Clickthrough Links

HTML Part

Test	Name
✔	Act-On
✔	RME
✔	Drilling Info
✔	First Insight
✔	www.actonsoftware.com

Text Part

Test	Name
✔	www.actonsoftware.com
✔	act-on-casestudy-RME.pdf
✔	act-on-casestudy-drillinginfo.pdf
✔	act-on-casestudy-firstinsight.pdf
	Name
	showPreparedMessage

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e.   Select **Spam Score** and Act-On will evaluate your message against SpamAssassin's spam filter validations. Your spam score will be shown on a scale of 1-14. Any infractions will be listed with an explanation so you can make the necessary changes.

4.3. Selecting Edit Text Version allows you to modify the text version that Act-On automatically creates for you. If you want to sync your edited text version with the HTML version, click Generate From HTML. When you create an HTML message, a text version is always generated and sent as well, for recipients whose email clients settings are set to plain text.

4.4. If you want to close the message and continue editing another time, click Save Draft and the message will be saved in your drafts area for you. To return to your draft, access the Messages menu and select Drafts. Locate the message you would like to continue editing, hover over the message and choose Resume Edit.

MESSAGE BUILDER STEP 2: ADDRESS

Act-On allows you to be very precise about whom you send – or don't send – messages to.

1.   Click **Address** on the blue bar. By default, the message you just built is set to be sent to entire lists.

2.   If you prefer to send to specific people, however, you can select the first radio button, **Specific People.** First click **Change List** to select the list you want to pick the contacts from. Then click **Pick People** and all the contacts in the list will appear. Make your selection, then click **Select** at the bottom.

3.   Choosing the second radio button allows you to send to one or more entire lists or groups. Two columns of checkboxes will be available to make your list selections from.

   a.   The first column is for lists you are sending to; the second column allows you to select lists to suppress.

   b.   You can send and suppress multiple lists in the same campaign. This protects you from sending a message to a contact on a suppressed list – who happens to be also on a list you are choosing to send to.

   c.   List choices are: Account Lists, Marketing Lists, Signup Lists, and Webinars lists, and all segments of those lists.

   d.   Act-On automatically suppresses all contacts in your Opt-Out, Hard Bounces, Spam Complaints, and Email Suppression Domains lists, and duplicates. If duplicate suppression is not desired for a particular campaign, uncheck the **Suppress Duplicates** at the top of the screen.
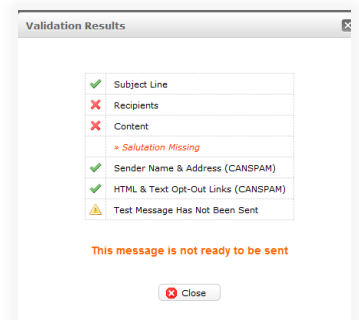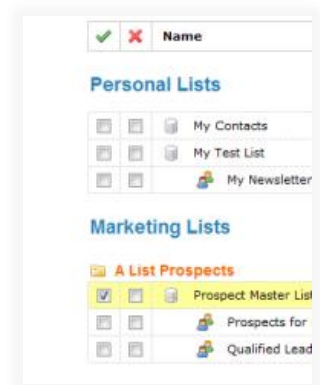
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MESSAGE BUILDER STEP 3: REVIEW

Act-On helps you ensure that your message is correct in every area.

Act-On automatically pushes your email through a validation process, to make sure key components are in place to help increase deliverability and ensure recipients are receiving accurate content.

- If you have not sent out a test message, Act-On will display a warning notice. This does not prevent your message from being sent, but emphasizes that sending test messages is a best practice.

- As you proceed through the validation, green checkmarks indicate that the message has passed a checkpoint. If all checkmarks are green, it will state this message can be sent. If any checkpoint has a red X, the Act-On system tells you explicitly *This message is not ready to be sent*. If you ignore that and attempt to proceed to Step 4 (**Send**), it will tell you the message needs a final review, and will take you back to Step 3. Once you review the validation results, continue to Step 4..

- What validation looks for:
    > Subject line entered
    > Valid recipients
    > Obvious errors in review content blocks (e.g., a Form Link block without a form attached)
    > Organization name and address (in footer or body copy)
    > Opt-out link in both HTML and text versions (the default footer in the Act-On Message Builder contains an automatic opt-out link)

Review steps

1. **Validation**. If you have gone through validation already and made corrections, this step will re-run when you select this option.

2. **Personalization**. Act-On reviews your email message for any personalization fields that you've requested, and ensures those values exist for each recipient on the list. The system will show you how many records were checked for personalization errors, and how many errors there are. If you proceed to send out the message, the system will explicitly state that recipients with personalization errors will not receive the message. Click the **Fix errors** button to see a list of all records with missing data. Selecting any record on the list will show you the missing personalization data. If you are able to fill in the missing data, when you click to update, the updated information will get pushed to the contact record as well as the mailing list.

3. **Previews**. Click **Previews** to pull up a random sampling of your email recipients. Select any recipient to see the exact message that person will receive with all personalization components filled out. For example, you will notice that the "To" field now shows the

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person's name and email address versus generically showing "1 segment". Scroll through the message and make sure everything looks correct.

4. **Spam Score**. Act-On will evaluate your message against SpamAssassin's spam filter validations. Your spam score will be shown on a scale of 1–14. Any infractions will be listed with an explanation so you can make the necessary changes. Keep in mind every receiving email client has its own rules and policies as to what is considered spam or not.

5. **Limits**. Your Act-On account is provisioned with a set number of active contacts (unique email addresses). You can mail multiple times in one month to the same contacts, and those contacts are counted only once. When you prepare to send to a list that contains new contacts, Act-On reviews the number of active contacts you've already used this month, and counts the new contacts in the list you want to send to. If the combined amount exceeds your subscription, the system will tell you that this message cannot be launched. As a best practice, make sure to check your limits before each email campaign launch. Please contact your dedicated team if you need additional contacts.

MESSAGE BUILDER STEP 4: SEND

Act-On gives you precise control over when you send messages.

Once you're satisfied with your message, you can send it out immediately or schedule it for a later date and/or time.

Schedule a message to be sent:
1. Click on the calendar icon and pick the date.
2. Choose the time you want the message to be sent.
3. By default, the time zone which appears is the one you have established in your profile, but you can select another time zone from the drop-down menu.
4. Add a **Sent** listing description if you want your message to display in the **Sent** listing with a title other than the subject line. When sending multiple messages with the same subject line, for example, you can add a title that reminds you which industry or region this particular message was sent to.
5. If you are integrated with Salesforce, MS Dynamics, or SugarCRM, and have chosen to send to a list imported from your CRM, you have the option to update each lead or contact's activity history in your CRM, to note that an Act-On email was sent to them. Act-On checks this box by default.

Message Formats

Selecting **Send HTML** will send your message in a Multipart format, with an attached text version for recipients who are unable to view HTML. Don't forget that during the **Compose** step, Step 1, you can manipulate

4. Send

the text version that accompanies your HTML email message by clicking **Edit Text Version**.

After clicking **Send HTML message**, Act-On will confirm your selection one more time. The confirmation window will show you:

- Who the message is being sent from.
- The lists or segments it's being sent to and how many records are in each.
- The date and time when the message will be sent.
- If you need to make edits, you can click **Go Back** to change your selection.
- If no edits are needed, click **Send Now** to send the message or **Schedule** if the message is scheduled for a future launch.
- Preview your message. Click either one of the **Preview** links found below each sending option to view your email message prior to sending it. To make modifications, simply click the **Go Back** button. If the information is correct, click the **Schedule** or **Send** button.
- Any e-mail messages that are scheduled to be sent in the future will be placed in Messages > Scheduled.

Once your message has been sent, you'll have immediate access to robust reports to help you analyze the success of the e-mail blast and view responses.

MESSAGE REPORTS AND ANALYTICS

Act-On lets you track and analyze your campaigns so you can leverage your successes.

From the Home page, there are multiple ways you can navigate to your **Sent Message** report:

- In the **Recently Sent** area, you can click on the message subject line to directly open that specific message report.
- In the **Quick Start** Menu, click **Email Campaigns** and all the sent messages will be listed in chronological order.
- Hover over the **Messages** menu at the top of the screen and go to the **Sent** submenu. It will pull up all the sent messages in chronological order.

Hover over the message titles and additional options will appear:

- **New** allows you to compose a new message using the contents of that sent message. The new message will have its own message report.
- **Add Recipients** allows you to send the message to additional recipients. If you are sending to the same list, it will automatically suppress anyone who has already been sent the message and will only send it to new email addresses it recognizes. Additional

NOTE: The usual reason to use **Add Recipients** with an existing email, rather than creating a **New** message, is that sending the same message to additional recipients will add the new recipient statistics to the already-gathered statistics of your original send, while a new message creates a separate report.

analytics will be added to the existing report.

- **Reports** shows you all the message report details. See **Report Details**, below.

- **Make Landing Page**. You can make a landing page out of your message immediately. Then, you can broadcast it out via your social media accounts.

- Under **More,** you can choose to **Rename** messages to help you organize the sent messages by changing their description in your **Sent** listing, or **Delete** a message altogether.

Report details within a message

- If you open a **Sent Message**, at the top, you can see who it was sent from, the different lists or segments it was sent to, the subject line of your message, and a timestamp.

- In the first tab, the **Message** tab, you will see the actual message.

- The second tab, the **Report** tab, is where you will see the message analytics. As you hover over any of the report's components, you can click on it to see more information. For example, click on **Opened** to see an individual's name, operating system, browser, and a date and time stamp. You can download a list of all these individual records, and also click on any of these names to pull up their overall Act-On activity history.

- You will be able to view statistics and individual data about successful, bounced, suppressed, and failed deliveries.

- If you inserted a **Multiple Choice** block into a message, Act-On gives you a summary of the different choices and their options; who selected which option, and a tally of it.

- If you included **Clickthrough Links** in your email campaign, Act-On lists those links and how many times those links were clicked. If you click on any of the numbers, you can drill down to see more information.

- Although you can download each individual component (e.g., **Opened**, **Clicked**, **Bounced**, etc.), you can also click on **Download Report** at the top to download the overall detailed message report.

- If you have applied **Website Visitor Tracking** to your website, and you linked to tracked web pages in your email message, you will also have a **Visits** tab, which will show you website visits driven from that campaign. You can scroll through it, click on any of these individuals, and see their overall activity history.

- The **Clickthrough Links** tab allows you to edit incorrect, broken, or changed links. This will take effect immediately, so if someone has yet to click on a link, they will get the correct link when they do click. Make sure to test it out and save your changes. This

NOTE: You can review bounces at any time, by going to Lists > Bounces & Opt Outs > Hard Bounces. Hard bounces, Opt-Outs, and Spam Complaints are automatically used as suppression lists for future email sends.
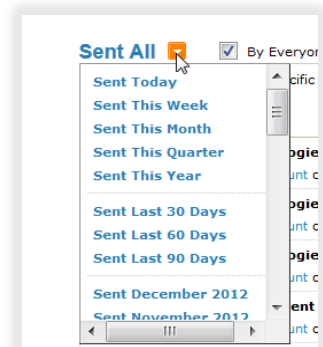
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capability helps you avoid having to rebroadcast your message with corrected links.
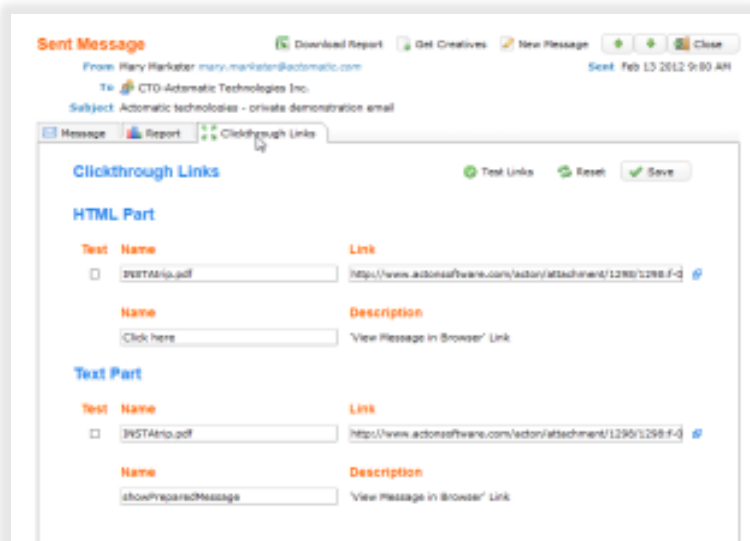
More options within the report

- Click **Search** to search through titles and text of **Sent Messages**.

- Click **Rollup** to download a complete Excel report of all messages sent to three or more recipients during the selected time period. (Select the time period in the drop down in the upper-left corner of the **Sent** listing frame.)

- Run the **Best Performing** report to see which messages have had the most opens and which the most clicks. You can set the minimum number of recipients, and the time period.

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TERMS TO KNOW

Total Sent	The **total number of messages sent** out to valid recipients. This number does not include recipients that failed or were suppressed.
Not Sent / Suppressed	Messages that are **not sent** are often due to a failure such as an invalid email address, or because the recipient didn't have the personalization fields you defined. Messages are **suppressed** because the recipient has either opted out of your message communications, or because the email address is a duplicate of another that has already been sent. Messages to specific recipients can be **suppressed** if, for example, they have previously opted-out of your communications, or if their email address is in the Hard Bounces list, is a duplicate of an address that has already received this message, or is in one of the suppression lists you chose when composing the message.
Opened	The **number of unique individuals** who have opened your message.
Bounced	The **number of messages that bounced** upon reaching their specified domain. Hard and soft bounce messages are the two types you may encounter. A **soft bounce** is an email message that makes it to the recipient's mail server and is accepted by the IP filter, but is bounced back undelivered before it gets to the recipient. This can happen if the content didn't pass muster, the receiving server is overloaded, or the receiver's mailbox is full. A **hard bounce** is an email message that has been returned to the sender and is *permanently undeliverable*. This may be due to an invalid address, or perhaps the email recipient's mail server has blocked your sending server.
Did Not Open	Recipients that received your message but **did not view** it
Clicked	The **unique number of recipients who clicked** on any link in your message. Click to view details such as who clicked on a specific link, and when they clicked.
Total Times Opened	**The total number of times** your message has been viewed, including multiple views by a single recipient.
Total Times Clicked	The **total number of times** links in your message were clicked on. To view the number of people who've taken action on your message see the **Clicked** statistic
Last Opened	The last date and time that your message was **viewed** by a recipient
Last Clicked	The last date and time that a link in your message was **clicked on** by a recipient.
Opt-Outs	The **number of people** that have opted out of communications of this message
Spam Complaints	The **total number of spam complaints** that this message received. A "spam complaint" occurs when a recipient marks your email as spam, not when a webmail provider filter tags your email as spam. Note that unsubscribes do not hurt deliverability, but spam complaints and hard bounces do.
Responses So Far	This term will show only if a **multiple choice option** was in your message. Recipients will be shown in a list, with their response to your question.

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