Creating an Email Campaign

What is the purpose of email campaigns?

Email campaigns are a great way to empower partners to promote products and services while generating leads in a ready-made format. Emails include marketing assets, which allow partners to cobrand email campaigns, and can also include landing pages to generate leads through forms.

Emails allow partners to monitor the success of their marketing efforts through open and click rates using the reporting feature within marketing center.

How do I create them?

Like forms, start by copying an existing email to use as a framework. Be sure to select an email that mirrors the type of email you want to create. (In other words, the email you create should maintain the same structure as the email you copied).

Once copied, update the content and images within the body of the email. Before activating the email, enter marketing center and send yourself a test email to ensure that the content and images are placed correctly.

(**Note:** In this lesson, you practice updating several fields within a copied email of your choice. You will not update every field available.)

What will I do in this lesson?

By the end of this lesson, you will be able to do the following:

- Copy an email campaign
- Create email settings
- Add a subject line
- Edit banner content & image
- Edit body content & CTA button
- Run a test message
- Publish email (This step is for **reference only.** Publish emails for partner use. **Do not publish practice email content created during this onboarding program**.)

To complete this lesson, you must download the assets located within the **Building your Content** Block**.** Once downloaded, save each item to your local drive.
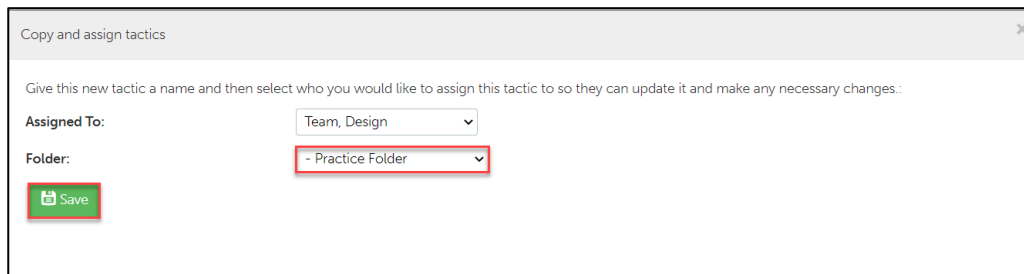
Steps

COPY EXISTING EMAIL

1   In **Content Manager**, from **Current Program**, select **Setup Content**.

2   From the **toolbar**, select **Tactics > Emails.** A list of existing emails appears.

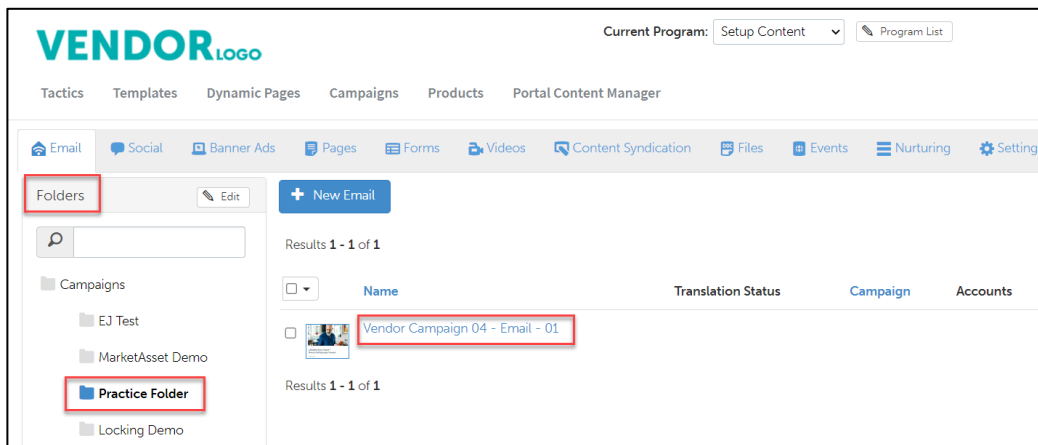**3**   Place a **checkmark** next to the email you want to copy. Then click **Copy**.
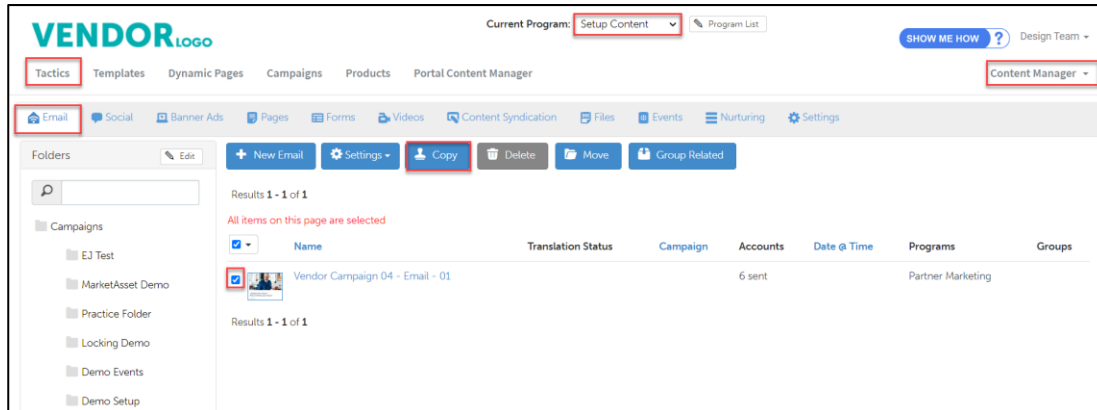
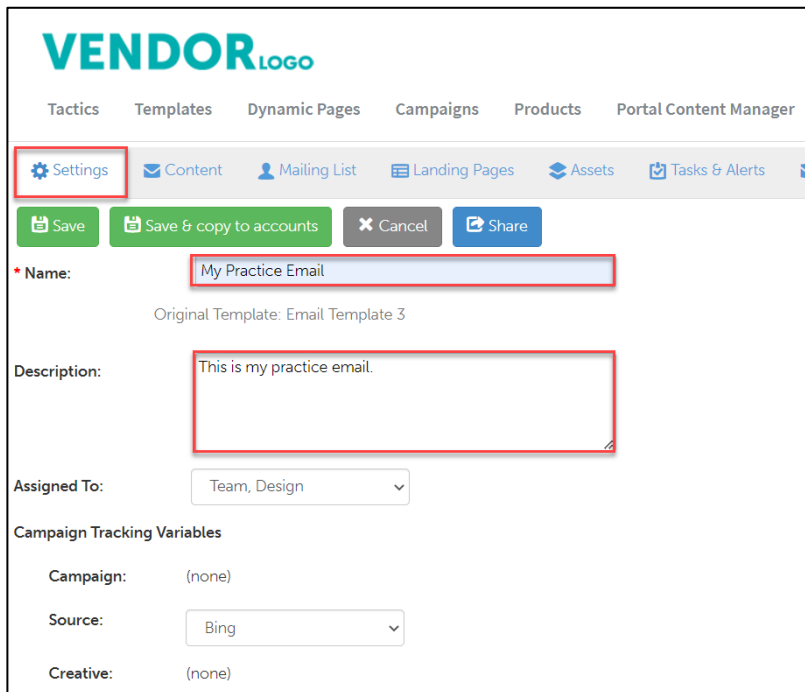**4**   From the **folder** drop-down menu, select the **folder** to copy your email.

5   Click **Save.**

CREATE EMAIL SETTINGS

1 From the **Folders** panel, select the **folder** for which you copied the email. Then select the **email**.

2 From the **toolbar**, select **Settings**.

3 In the **Name** field, type **My Practice Email**.

4 In the **Description** area, type. **This is my practice email.**

5   From **Send Email From,** select **Use the name and email address associated with each contact or account.**

6   In **Custom Thumbnail,** click **Allow system to overwrite your thumbnail with a generic version.**

7   In **Enable testing mode,** click **No, disable testing mode, I am sending out this campaign.**

8   In **When would you like this to be available in the managed library,** click **Always.**

9   In **What program would you like to use the campaign in**?, click **Setup Content.**

10 In **Would you like to limit access based on account profile fields,** click **No.**

11 In **What attributes would you like to set for this asset?**, select **all attributes**.

What attributes would you like to set for this asset:

* Languages
- [ ] All
- [x] English (United States)
- [ ] English (United Kingdom)
- [ ] Spanish

* Marketing Focus
- [x] All
- [ ] Prospects
- [ ] Existing Customers
- [ ] Enterprise
- [ ] SMB

💾 Save   💾 Save & copy to accounts   ✖ Cancel

12 Click **Save**.

ADD SUBJECT LINE

1 From the **Email** toolbar, select **Content.**

2 In the **Subject** text box, copy & paste: **Payment Processing just got a whole lot cheaper.**

VENDOR LOGO

Tactics   Templates   Dynamic Pages   Campaigns   Products   Portal Content Manager

⚙ Settings   ✉ Content   👤 Mailing List   ▦ Landing Pages   ◈ Assets   ☑ Tasks & Alerts

👁 Preview ▾   💾 Save & Copy Changes   👁 Save, Copy Changes & Preview   ⬇ Download ▾

In-Line Edit   Table View Edit
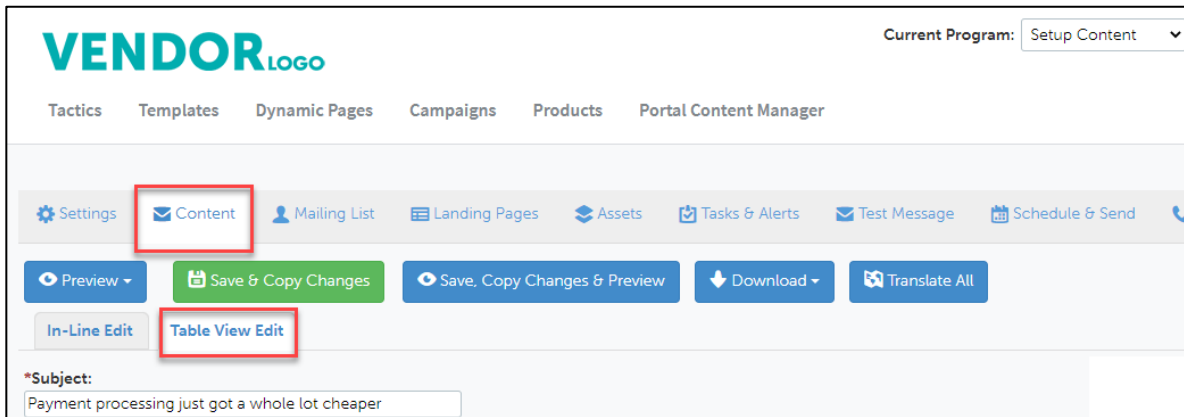
*Subject:
Payment processing just got a whole lot cheaper
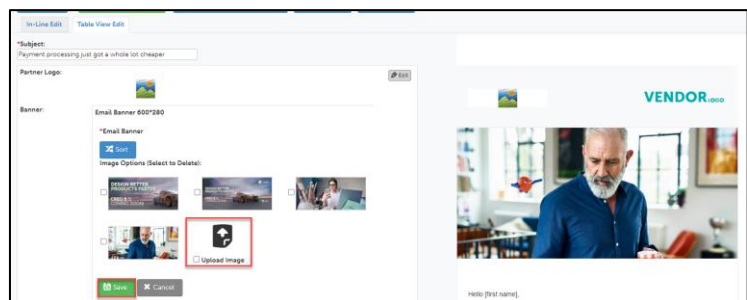
Partner Logo:

EDIT BANNER CONTENT & IMAGE

1   **Note:** This exercise is to practice updating banner content and images in an email. The placement of this content may vary depending on the email you are viewing.

2   From the **Email** toolbar, select **Content > Edit Content.**
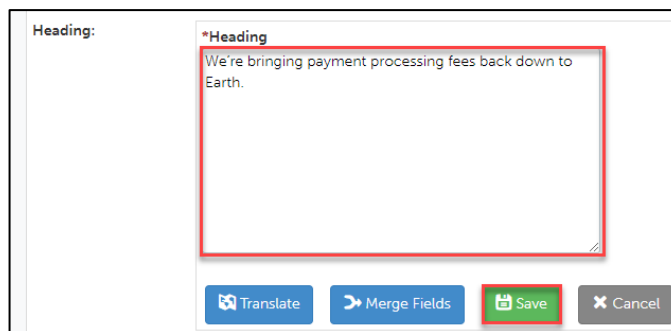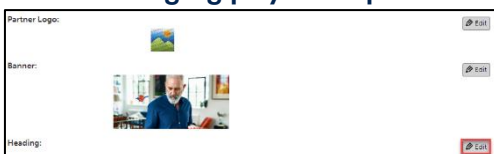
3   Click **Table View Edit**.

4   To update a banner image, in the appropriate row, click **Edit**. Then click **Upload Image**. Select the **image** from your local drive. (Note: this image is included in your download packet.)
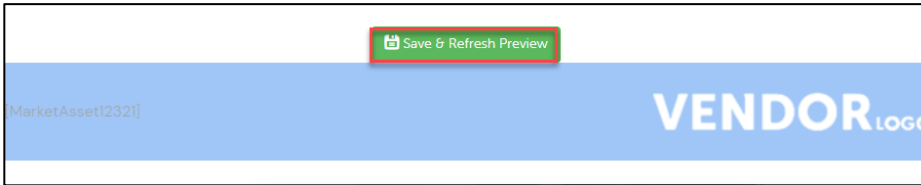

5   Click **Save**.

6   To update banner content, in the appropriate row, click **Edit**. Then, copy & paste:

We're bringing payment processing fees back down to Earth.
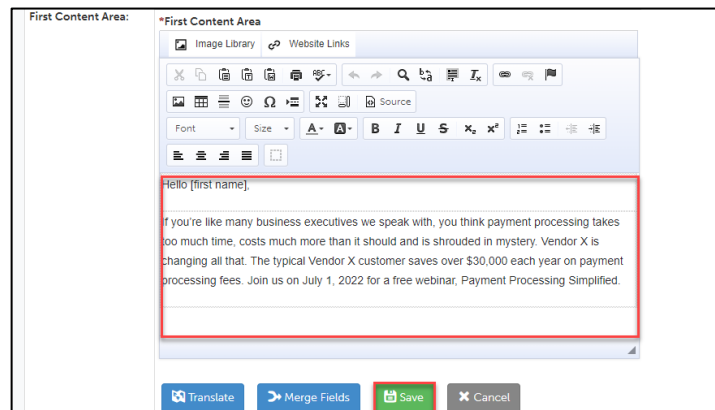

7   Click **Save**.

8   Click **Save & Refresh Preview**. Review your changes in the preview pane on the right side of the page. Leave the email open during the next step.


EDIT BODY CONTENT & CTA LINK

1   **Note:** This exercise is to practice updating body content and CTA links in an email. The placement of this content may vary depending on the template you are viewing.

2   To update body content, in the appropriate row, click **Edit**. Then copy and paste**:**

If you're like many business executives we speak with, you think payment processing takes too much time, costs much more than it should and is shrouded in mystery. If you're like many business executives we speak with, you think payment processing takes too much time, costs much more than it should and is shrouded in mystery. Vendor X is changing all that. The typical Vendor X customer saves over $30,000 each year on payment processing fees. Join us on for a free webinar, Payment Processing Simplified.
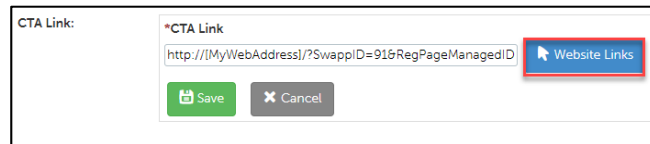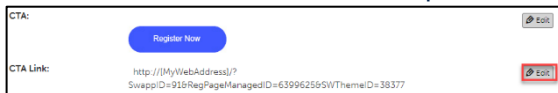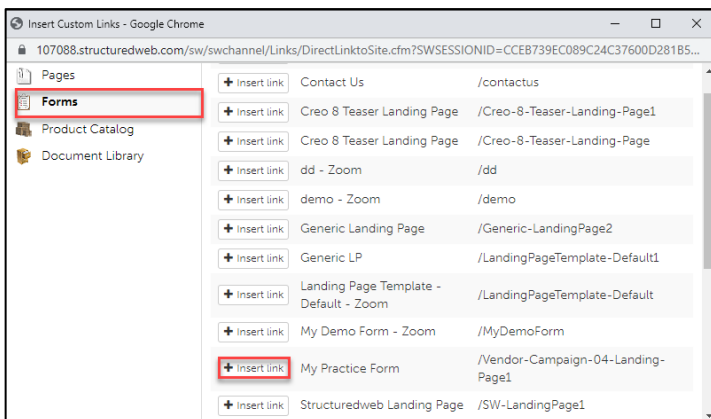

3   Click **Save**.

4 To update a CTA Button, in the appropriate row, click **Edit**. Then, in the CTA text field type, **Register Now.**
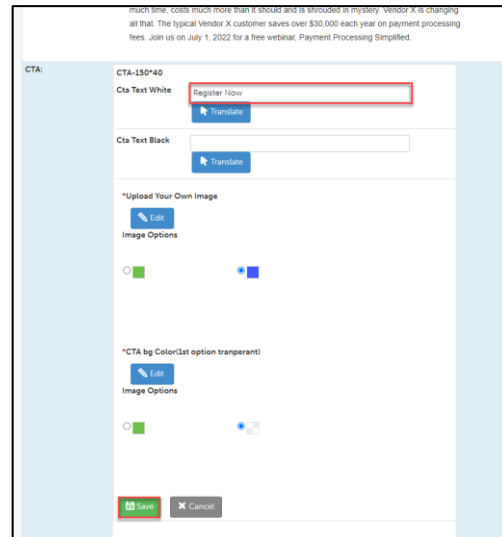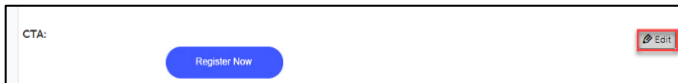

5 To edit a CTA link (in this example, adding a landing page), in the appropriate row, click **Edit**. Then select **Website Links**. A box opens.

6 On the left side of the box, click **Forms**. Locate **My Practice Form**. Then click **Insert Link**. This action brings you back to the CTA Link box.
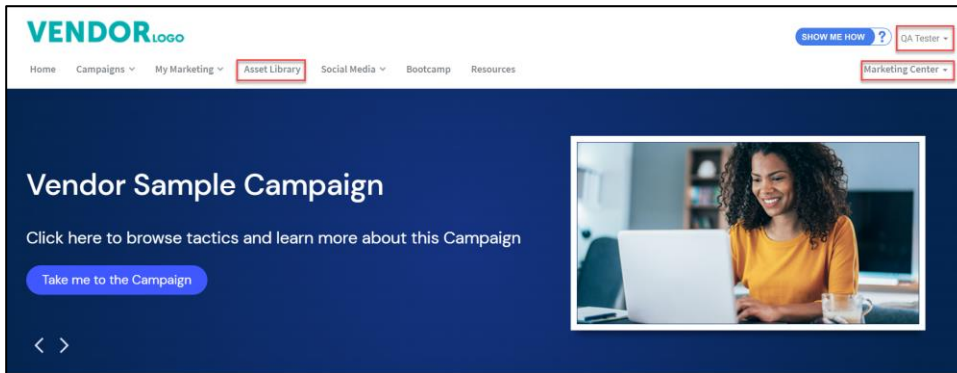

7 Click **Save & Refresh Preview**. Review your changes in the preview pane on the right side of the page. Leave the email open during the next step.
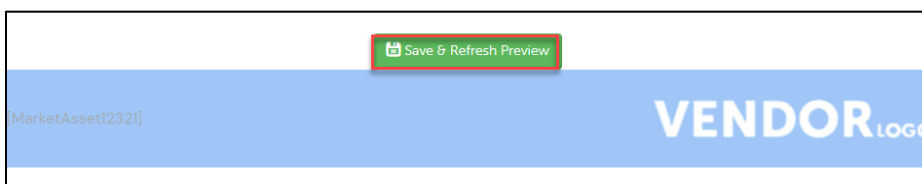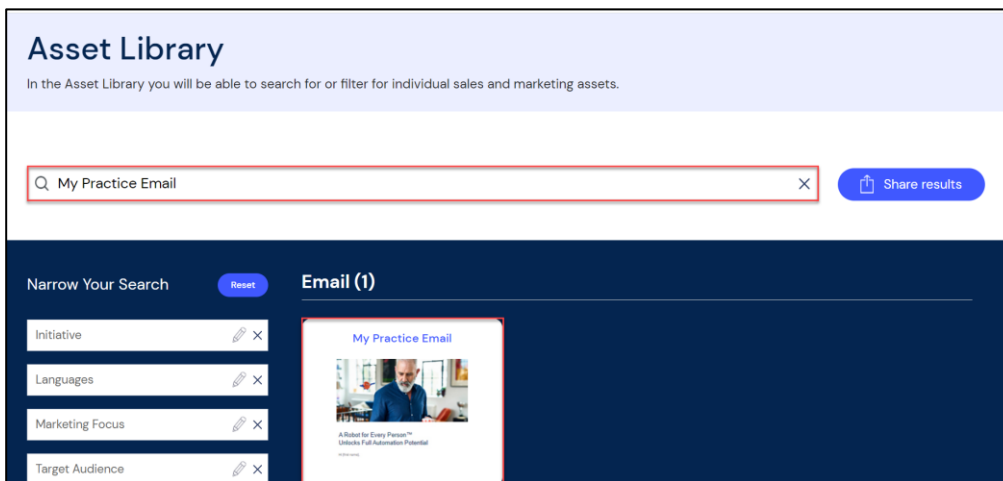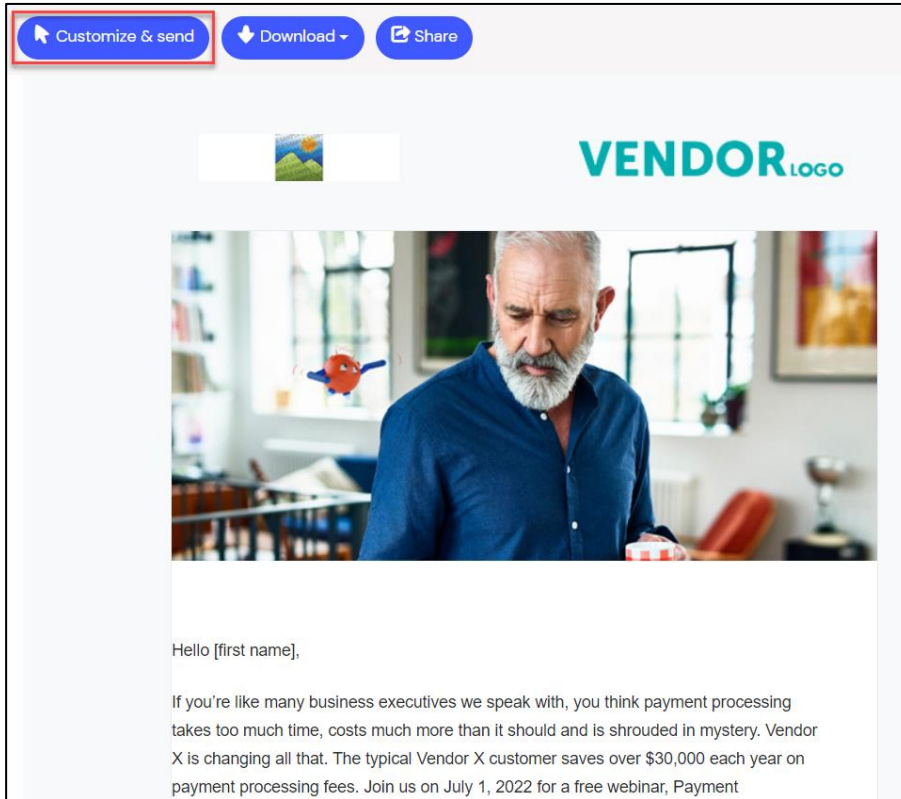
RUN A TEST MESSAGE

1 Enter **Marketing Center** using a **Setup Content test account**.

2 From the top toolbar, select **Asset Library**.

3 In the **Search** bar type **My Practice Email.** Then click the **appropriate tile**.
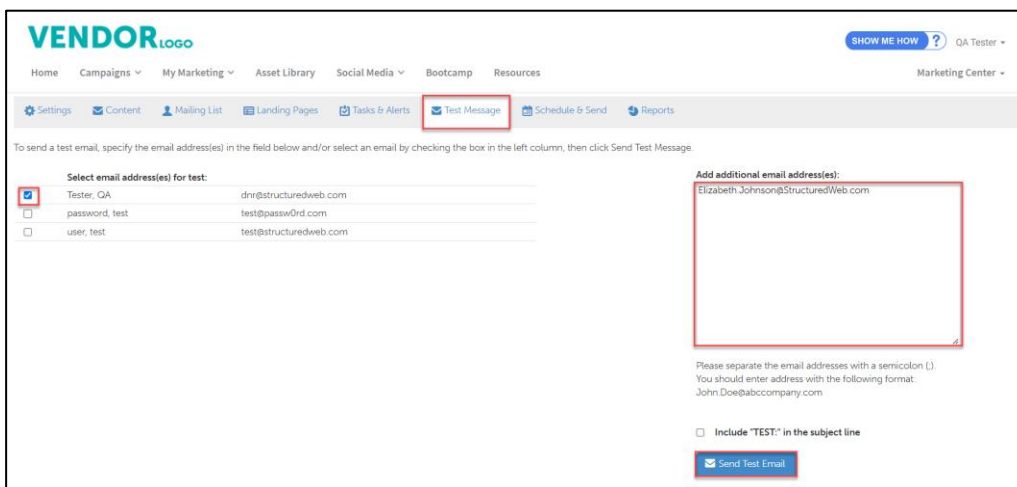
4 Click **Customize & send**. The email page opens.

5 From the **Email** toolbar, select **Test Message**.

6 From **Select email address(es) for test**, select **your email address**. If your email address does not appear, then in the **Add additional email address(es)** box, type your **email address**.
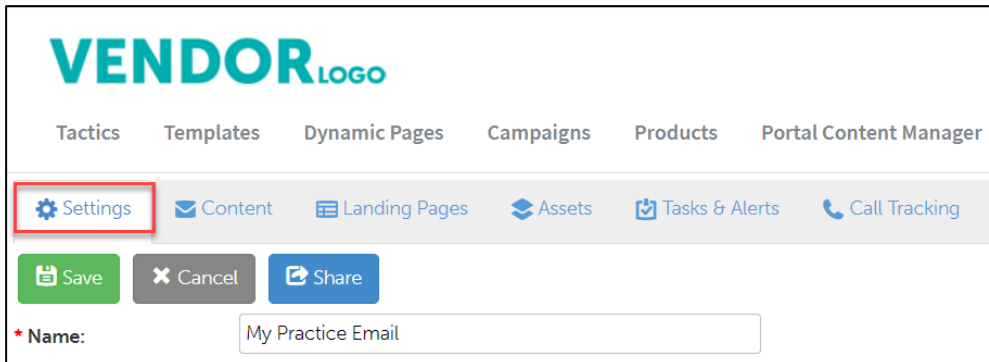

7 Click **Send test email**. After reviewing the test message, go back to Edit banner & Images to make changes. Or move to the next step.
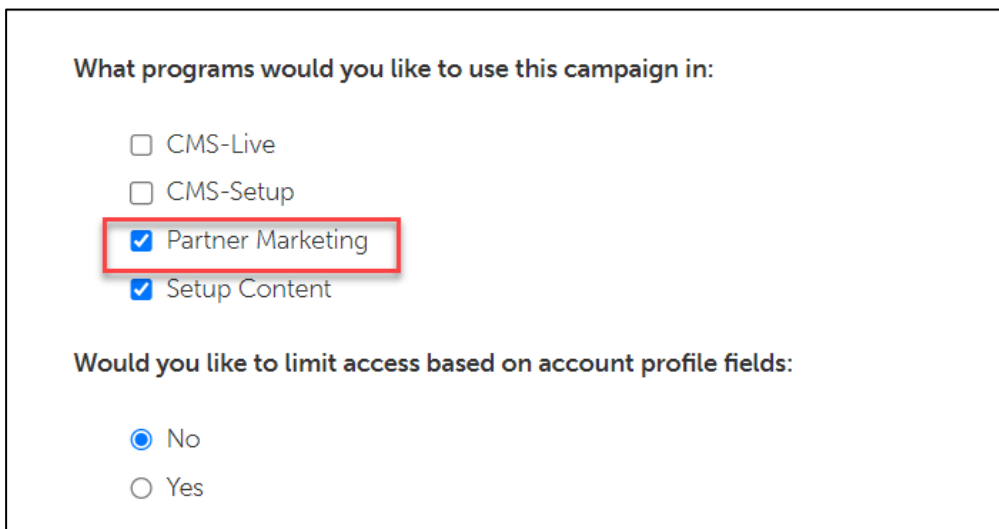
PUBLISH EMAIL (THIS STEP IS FOR REFERENCE ONLY)

1 Return to **Content Manager > Tactic > Email > My Practice Email.**

2 From the **Email** toolbar, click **Settings**.

3 From **What programs would you like to use this campaign in**, select the **appropriate program.** (in most cases, this will be Partner Marketing).

4 Click **Save**.