

EMMA TRAINING
SAM HOUSTON STATE UNIVERSITY

CONTENTS

1. Getting Started with Emma	4
1.1 - Emma	
Subaccounts	4
Internal vs. External	4
1.2 - Introduction to Emma User Interface	4
Log in to Emma	4
Navigation	4
1.3 - Home Screen	5
Account Activity Summary	5
Recent Mailings	5
2. Audience	6
2.1 - Introduction to the Audience Tab	6
Internal vs. External	6
2.2 - Managing an Audience with an Internal Subaccount	6
2.3 - Managing an Audience with an External Subaccount	6
Add Contact	7
Imports	7
Manage Contact Fields	8
Adding Contacts - One at a Time	9
Subscriptions	9
2.4 - Groups vs. Segments	10
Groups	10
Segments	10
3. Campaigns	12
3.1 - Introduction to the Campaign Tab	12
Managing Images & Documents	12
3.2 - Email Accessibility and ADA	12
3.3 - Creating a New Email	13
3.4 - Adding Content	14
Text Edit Toolbar	14
Strip Formatting	15
Insert Hyperlink	15
Insert Tool	16
3.5 - Drag & Drop Content Blocks	19
Content Block Types	19
Adding Content Blocks	20

Adjusting Properties of Content Blocks	20
Duplicating Content Blocks.....	21
Deleting Content Blocks	21
3.6 - Adding an Image	22
Adding an Image to a Folder.....	22
Deleting an Image.....	23
3.7 - Sending a Test Message	23
3.8 - Review & Send.....	24
4 - Response	25
4.1 - Compare Mailings	25
4.2 - Your Response Details	26
Save This Tab as a Segment.....	26
5 - Additional Resources	27
5.1 -Settings.....	27
5.2 - Help	27

1. GETTING STARTED WITH EMMA

1.1 - EMMA

Emma

Emma is a cloud-based email marketing platform that helps users design email campaigns and review their performance. It is the new, preferred mass email system on campus.

Subaccounts

Our Sam Houston Emma account is broken down into subaccounts. A user might have access to multiple subaccounts within the Sam Houston account. Each department, college, and division has their own account.

Internal vs. External

You might notice that at the end of your subaccount name it has either **(internal)** or **(external)**.

Internal audiences are only those with an shsu.edu email address. These subaccounts are maintained using an API connection with Banner. These audiences are synced nightly. The most notable difference is that the opt-out language has been removed from the footer of the emails. When sending to **shsu.edu** email addresses, the opt-out language is not required. If you need to send an email to an SHSU audience that is not in your internal subaccount, submit a request on _____.

External audiences are specific email lists maintained by subaccount users.

NOTE:

DO NOT ADD NON-SHSU EMAIL ADDRESSES OR EXTERNAL EMAIL LISTS TO YOUR INTERNAL AUDIENCES. THIS VIOLATES CAN-SPAM LAWS.

1.2 - INTRODUCTION TO EMMA USER INTERFACE

Log in to Emma

1. To log in to the Emma platform visit **massemail.shsu.edu**.
2. Enter your SHSU username and password credentials and select "Log In".

Navigation

The top navigation bar will be your primary tool to move around Emma. The primary buttons include **Home, Audience, Campaigns, Response, Automation** and **Insights**. To the far right of the top navigation bar are two additional icons, help and account settings.



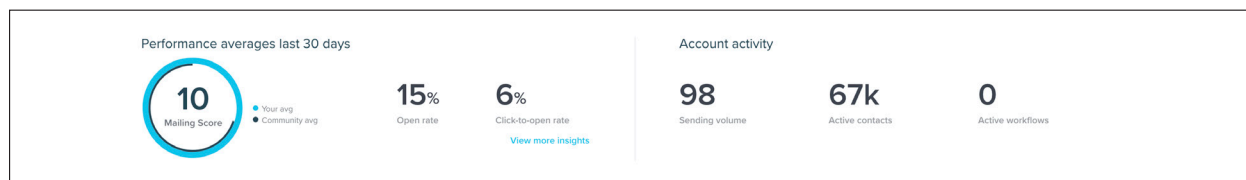
1.3 - HOME SCREEN

The home screen provides an overall snapshot of the recent activity in your sub-account.



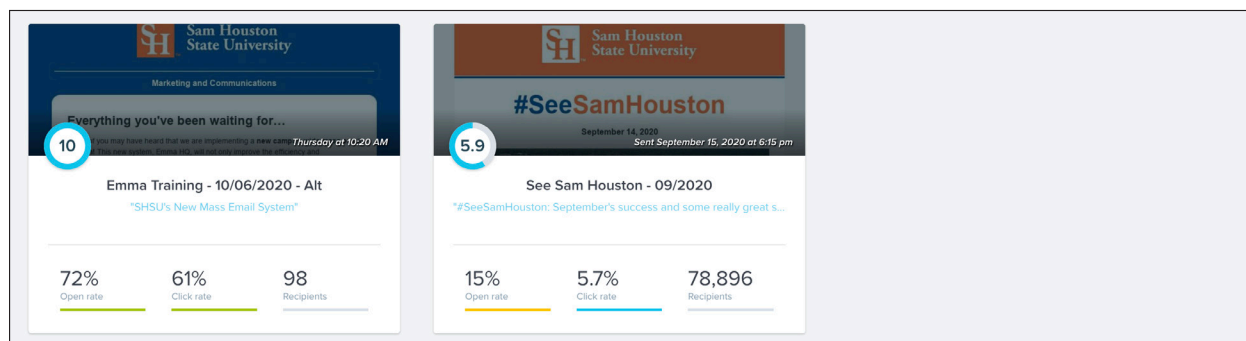
Account Activity Summary

The account activity area of the **Home Screen** offers a brief summary of the activity that has occurred during the last calendar month in your mailing account. It displays your average monthly open and click-to-open rates, the number of emails that your account has sent, and the total number of contacts in your account. The account activity area also displays your overall mailing score. Emma assigns a score out of 10 for how well your mailing did compared to the community average.



Recent Mailings

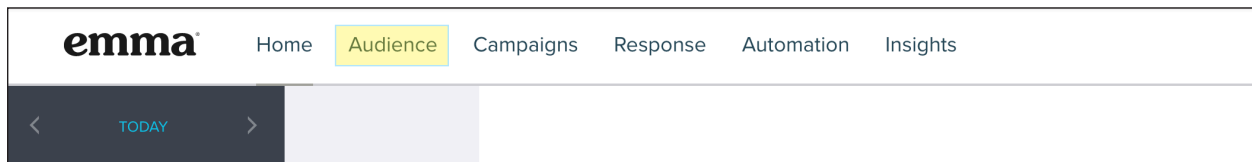
The recent mailings section of the **Home Screen** offers a quick way for you to view the mailing score and high-level analytics of your most recent mailings.



2. AUDIENCE

2.1 - INTRODUCTION TO THE AUDIENCE TAB

The audience tab is the main hub in the Emma platform for managing subscribers in your mailing list. Every subscriber in Emma has a unique user account that they are able to manage their subscriptions and mailing preferences (External audiences only). The main audience tab contains links for you to manage contacts, manage audience fields, manage and create groups and segments and import contacts (external subaccounts only).



Internal vs. External

You might notice that at the end of your subaccount name it has either **(internal)** or **(external)**.

Internal audiences are only those with an shsu.edu email address. These subaccounts are maintained using an API connection with Banner. These audiences are synced nightly. The most notable difference is that the opt-out language has been removed from the footer of the emails. When sending to **shsu.edu** email addresses, the opt-out language is not required. If you need to send an email to an SHSU audience that is not in your internal subaccount, submit a request on <https://www.shsu.edu/dept/marketing/university-marketing>.

NOTE:

DO NOT ADD NON-SHSU EMAIL ADDRESSES OR EXTERNAL EMAIL LISTS TO YOUR INTERNAL AUDIENCES. THIS VIOLATES CAN-SPAM LAWS.

External audiences are specific email lists maintained by subaccount users

2.2 - MANAGING AN AUDIENCE WITH AN INTERNAL SUBACCOUNT

All internal subaccounts are connected to Banner. Audiences for these accounts are automatically updated from banner on a nightly basis. If you are having any issues or have a request for changes or additions to your audience or fields please contact Marketing and Communications. Fields and audiences should not be altered, edited or removed as this could cause the disruption of data from Banner to your subaccount.

2.3 - MANAGING AN AUDIENCE WITH AN EXTERNAL SUBACCOUNT

External subaccounts that are not connected to a database (i.e. Banner) will require a manual import of your audience.

You can only upload a contact list if everyone on that list has either asked to receive emails from you or has had a clear relationship with your organization (i.e. customer, employee, or volunteer) in the last 12 months. If you have contacts who were added earlier than that, you must have emailed them at some point within the last 12 months to keep them on your list.

Add contact

This provides a quick way for you to add contacts to your audience one member at a time. Use this button only if you need to create a few new contacts at a time.

Add contact

Imports

Use this button if you have a list of emails (in .csv or .xlsx format) that you would like to import into your account.

The first step in importing contacts into Emma is to prepare the fields in your spreadsheet to match those in your audience. It's easy enough to import text into text fields. But what happens when you're importing into a custom field that's a pull down menu of dates or state abbreviations, or a series of check boxes or radio-button choices? If you're importing into one of these special fields, you'll want to take a minute before you import to make sure the information in your import file follows these standard formatting rules:

Prepping the fields on an import

Checkbox Menus:

Each option is separated by ':::' (three colons, no spaces). For a menu of favorite pizza toppings, the options in your spreadsheet might look like this:

cheese:::sausage:::onions

Dropdown and Radio Button Menus:

Your Excel file's options match your drop-down menu options exactly. 'New York' won't match up with 'NY' and needs to be converted prior to import. Also make sure your options don't contain more than 200 characters of text apiece.

Select Multiple:

Make sure each option is separated by ':::' (three colons, no spaces).

There are quick, easy ways in Excel to change the formatting of an entire column of data. Be sure to use Microsoft Excel's help section if you're not sure how.

Once your data matches the formatting guidelines listed above, take these steps to import contacts:

1. From the Audience page, click the "Imports" button. From the import page, click "Import Contacts" on the top-right.
2. After making sure your list complies with the outlined permission standards, upload your file by either dragging it into the box displayed, or by clicking "Choose file" to select a file from your computer.
3. Choose how you want Emma to handle any email addresses in the file you've uploaded that are already associated with contacts in your audience. You can choose to leave existing contacts alone and just add new contacts from your file, or you can choose to update existing contacts with the information within your file. This is generally the way to go if you want to add existing contacts to a new group along with new contacts, or if the file you're uploading contains the most up-to-date information about your contacts.

Important!

Permission-based email is about keeping in touch with people who value your organization, not delivering unwelcome inbox surprises.

Rented and purchased lists are not allowed. You can only upload a contact list if everyone on that list has either asked to receive emails from you or has had a clear relationship with your organization (as a customer, employee, or volunteer, for example) in the last 12 months. If you have contacts who were added earlier than that, you must have emailed them at some point within the last 12 months to keep them on your list.

Not sure if this list meets these standards? [Stop, and contact us for help.](#)

Drag and drop to upload

Acceptable file types: .xls, .xlsx, or CSV formatted file.

[Choose file](#)

* Before you import your list, make sure it meets our [permission policies](#)

Source

Where did this import come from? ▾

How should we handle duplicate contacts?

☒ Update their records with information from this import (add and update)

☐ Leave them alone (add only)

Should contact updates trigger a field change workflow if applicable?

☐ Yes, trigger field change workflows from this import (import may take longer to complete)

[Cancel](#) [Continue](#)

4. Map your fields by following the directions on the page. To help you get a head start on mapping your fields, Emma automatically uses the “Guess” function to speed up the field mapping process. This uses some fancy logic to anticipate if your file has a header row and will pre-check the “Skip” box to ignore that header row in most cases.
5. If your file contains information that you want to import into Emma, but you haven’t yet created a field, you can do so by choosing the “Add Field” option from the field drop-down menu.
6. From the pop-up window, you can name your new field and choose a field data type from the drop-down menu. Click “Save” to continue mapping your fields. When you’ve finished mapping your fields, click “Continue.”
7. Create a new group for your import or select an existing group in your audience. Click “Continue.” Once you’ve reviewed your import summary, click “Import” to start the process.

Import speed will depend on the size of your file, as well as how large your existing audience is since imports check every new record against every existing record. If the import shows up as a green checkmark, it was successful. However, If the import shows up as a red X, there was a problem. Click on the downward-pointing arrow to the right to “View error” and follow the instructions to re-import the newly tweaked file. After a successful import, you can also click that down-arrow button to the right to “View import statistics.”

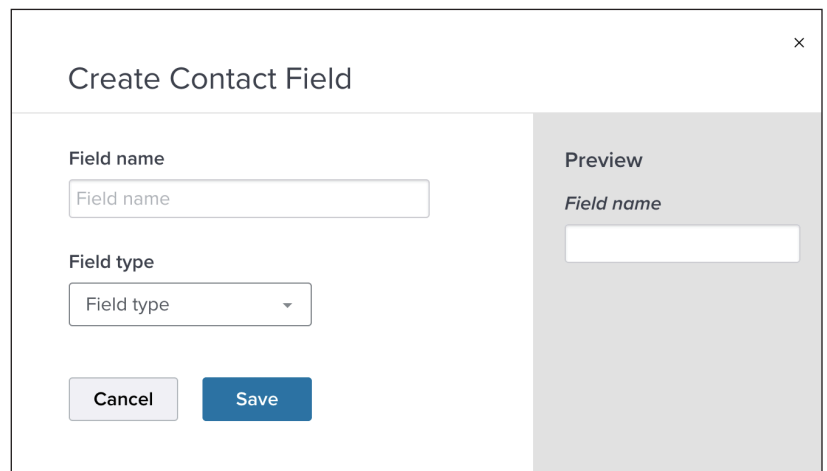
Manage Contact Fields

In Emma, every contact has an account with information tied to it, using the email address as the primary identifier. By default, two additional contact fields have been created for users in your sub-account, first name and last name. You can add more contact fields, if needed.

To manage contact fields in your sub-account, first navigate to the “Audience” tab. On the left side navigation there is a button that says “Contact fields”, clicking on this button will take you to a page that displays all of the current contact fields

of your sub-account. Selecting the down arrow to the right of a contact field will give you the option to either “Edit” or “Archive” the field. If you select edit, you are able to change the name of the field as needed. It is important to note that after the field is initially created you cannot change the field type or shortcut name of a contact field.

To add a contact field, select the “Create Contact Field” button at the top of the manage contact fields page. This will launch a pop-up window with a few options for you to enter or select in order to create a new contact field. First enter a field name, then select the field type (Note: if you are creating a Postal Code, State, or Country field type the “Field Name” will be locked and default to the name of the field type you are creating). When changing the field type you will see a preview of the field that you are creating on the right-hand side of the pop-up window. If you are selecting radio button, select multiple, drop-down menu, checkbox menu, or date picker, additional fields will appear below the field type to customize the field. Once you are happy with your settings select “Save” at the bottom of the pop-up and your field will be created.



Adding Contacts - One at a Time

If you need to quickly add a few contacts to your audience, here's how:

1. From the main Audience page, click the “Add a contact” button.
2. This will open up a blank contact record. Fill in the information in the fields provided.
3. On the right side of the page, check any groups you’d like this contact to be a part of.
4. Select “Save and Close” or “Save and Add Another.”

Contacts / Add contact

email address

Contact details

Save and close

Save and add another

Cancel

Contact info

Email *

Email

Groups

Create group

If you're adding someone who already exists in your audience, you will be alerted that you need to make your changes to the previous record. It's OK for someone to be part of more than one group in your audience. If you send to three groups (at the same time) and Bill is in all three, he only gets one email.

Subscriptions

Subscriptions will appear as options for when your audience members select “Manage preferences” in the footer of an email. As opposed to “Opt out”, “Manage preferences”, allows your audience members to continue to receive email while choosing content that fits their preferences.

The Subscription Center is located in the “Audience” section of your account. Click “Subscriptions” on the left side navigation, then select “Get started” or “Manage Subscription Center”. Managing your subscriptions allows you to organize the contacts that subscribe to your content into separate buckets for easier segmentation and also provides a single view of each subscriber in your audience. Plus, if any of your subscribers belong to more than one subscription, each subscriber is only counted once in your audience.

Subscriptions / Manage subscription center

Edit copy

Select contact fields

Edit order

Add logo

Preview subscription center

Save and close

Add logo

Drop and drop your logo here. File formats accepted are PNG and JPEG. Once uploaded, the logo will appear in the Subscriptions Center. The ideal logo size is 400 x 400 pixels. However, it's fine to upload a larger logo (less than 8MB in file size).

Drop logo image here

Acceptable file types: .png, .jpg, or .jpeg

Upload new file

Remove logo

Once your Subscription Center is set up, your subscribers can toggle individual subscriptions on or off, or choose to unsubscribe from all subscriptions, which is the equivalent to fully opting out at the audience level.

Creating Sign-up Forms

You can create a sign-up form to have users join your mailing audience. This forms allow new subscribers to sign up from your emails.

To setup a sign-up form follow these steps:

1. From the main “Audience” tab, select the “Forms” tab on the left side navigation.
2. Click “Create new form” on the right side of the page, or click on the name of an existing form.

3. Once your sign-up is created, it will automatically appear any time someone clicks the sign up link at the bottom of your mailings.

2.4 - GROUPS VS. SEGMENTS

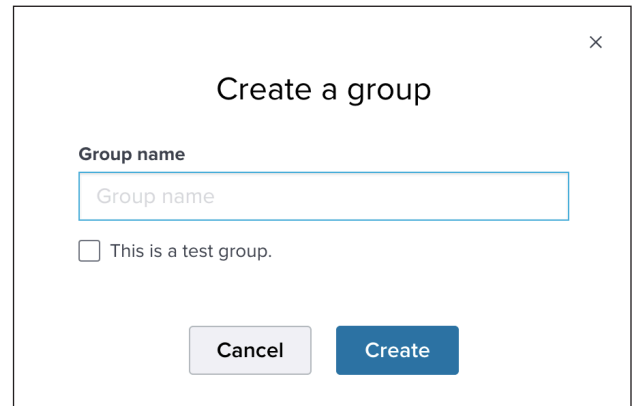
Groups are a static selection of your audience, you can manually add and remove contacts of a group. A Segment is a dynamic selection, as your audience's data changes, the segment will change.

Groups

Groups are a static collection of your audience that all match a certain set of criteria of your choosing. Contacts in a group are only added and removed manually. In the groups tab, you are able to see the number of active contacts, the number of subscribers that have opted out of future mailings (for external subaccounts), the number of error contacts (incorrect email addresses), and what type of group it is (Regular vs. Test).

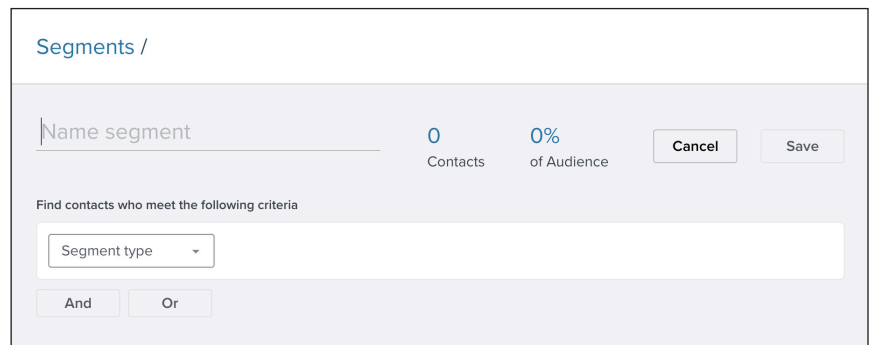
Creating a New Group

The first step in managing your audience is to create a group. To do this, select the "Audience" tab from the top navigation bar. On the left hand navigation, select "Groups", then a button on the right that says "Create a group." A dialog box will open that asks you to name your new group. If this group is intended to be used for testing purposes only (contacts that you will be sending your test messages to for example), please tick the "This is a test group" checkbox, otherwise leave it un-checked. Once you've named your new group select "Create group."

A dialog box titled "Create a group" with a close button (X) in the top right corner. It contains a text input field labeled "Group name" with the placeholder text "Group name". Below the input field is a checkbox labeled "This is a test group." At the bottom right are two buttons: "Cancel" and "Create".

Segments

In Emma, segments provide another dimension for you to reach your audience. Segments allow you to target contacts based on their groups, their information, their response history, their sign-up history, or any combination thereof. The more information you collect and store, the more options you'll have when segmenting your audience.

A screenshot of the "Segments /" interface. It features a text input field labeled "Name segment". To the right of the input field are two statistics: "0 Contacts" and "0% of Audience". Further right are "Cancel" and "Save" buttons. Below these is a section titled "Find contacts who meet the following criteria" containing a "Segment type" dropdown menu. At the bottom are "And" and "Or" buttons.

To view existing segments, navigate to the Audience page and then click on the "Segments" tab below "Groups." From this screen, you are able to manage your existing segments by clicking on the down-arrow located on the right of the page next to the segment you'd like to manage. This menu gives you several options including "Open", "Export", "Rename" and "Archive."

Creating a New Segment

To create a segment take the following steps:

1. On the main Audience page, click on the "Segments" tab next to "Groups." Once on this tab, select the "Create Segment" button.
2. Begin building your segment using the page that appears. There are four categories you can search by: audience, fields, response, and sign-up/manage preferences history.

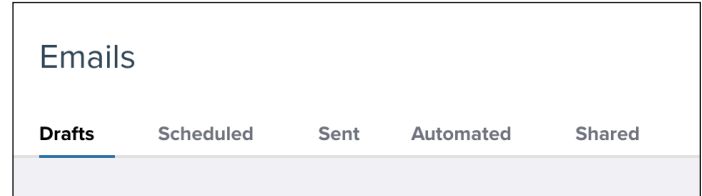
3. Once you have configured the first set of criteria for the category you've chosen in step 2, click "Add." To add multiple search criteria to any single category, select "Add Another" and configure accordingly. If you add a second set of search criteria for a category you can also choose whether you'd like the search to match all those criteria or any of them.
4. Once you have added all the criteria to the category you've chosen, click "Save."
5. When you're done adding criteria for the category you've selected, you may choose another category to further refine your search, or give it a name and save it if you're done.
6. You can access (and edit) your saved segments any time from the main segments page. Your segments will also appear in a drop-down menu when you get ready to send a mailing. To send an email to a segment, simply choose the appropriate segment (instead of a regular group) when you select your mailing's recipients.

3. CAMPAIGNS

3.1 - INTRODUCTION TO THE CAMPAIGN TAB

The “Campaigns” Tab is the main hub for managing your sub-account’s emails. There are five tabs in the campaigns section, “Drafts”, “Scheduled”, “Sent”, “Automated”, “Shared.”

- The “Drafts” tab will show you any emails that you currently are working on and have not yet sent, along with giving you the option to either edit, duplicate or archive any mailings in this list.
- The “Schedule” tab will show you any emails that you have scheduled to send.
- The “Sent” tab will show you any emails that you have previously sent, along with the option to either edit, duplicate or view the response (analytics) of any mailings in this list.
- The “Automated” tab will show you any emails using automation.
- The “Shared” tab will show you any emails that you have shared with another subaccount or that have been shared with you.



Managing Images & Documents

On the Campaign tab, you have two buttons that allow you to manage your sub-accounts assets, images and documents. They allow you to view all the images or documents that your sub-account has uploaded and has access to. To add a new image or document follow these steps:

- 1) Select either “Images” or “Documents” from the Campaigns tab.
- 2) Click the “Upload” button and locate the file you wish to upload, select “Open”.

Note: You can organize your images and documents into folders to keep things more organized. In order to do this, you must manage your assets through the email editor. For more information about how to do this, see *section 4.6 “Add an image to a folder”*.

3.2 - EMAIL ACCESSIBILITY AND ADA

All emails must comply with SHSU’s ADA policy.

Images cannot serve as text. Images are decorative and should not be used to convey information (exceptions are word marks and limited text in header images). All information in your email should be conveyed through text (the kind that can be copied and pasted from an email, website, or Word document). Doing anything to the contrary is a clear violation of accessibility guidelines and will not be sent.

Per ADA guidelines, when text appears in the SHSU Orange on a light background color the text must be Large (defined as 14 point; typically 18.66px) and bold, or 18 point (typically 24px) or larger.

Sam Houston State University ADA Policy for Web and Email

<https://www.shsu.edu/intranet/policies/administrative/web-accessibility.html>

Sam Houston State University is committed to making all official, academic and business, University sponsored pages accessible to all users. A descriptive text equivalent is provided for images aiding users who listen to the content of the site by using a screen reader, rather than reading the site. Major reports and other publications that are on the Web site are generally available in HTML or Adobe Portable Document Format.

SHSU is committed to making its Web site accessible according to the standards set forth by the World Wide Web Consortium (W3C). To improve the accessibility of our Web site, we test any major redesign with screen readers and other tools. The results of these reviews are incorporated into the Web site. We currently use various tools for site validation, and it is our goal to achieve the highest level of accessibility attainable. Yearly audits are conducted to ensure compliance with the criteria established by the state (TAC 206 & TAC 213).

SHSU welcomes comments on how to improve the site's accessibility for users with disabilities. If you use assistive technology and the format of any material on our Web site interferes with your ability to access the information, please contact SHSU at servicedesk@shsu.edu or telephone our Service desk at 936.294.1950. To enable us to respond in a manner most helpful to you, please indicate the nature of your accessibility problem, the preferred format in which to receive the material, the Web address of the requested material, and your contact information.

Additional information about accessibility programs in Texas is available from the Governor's Committee on People with Disabilities at <http://www.governor.state.tx.us/disabilities/>.

3.3 - CREATING A NEW EMAIL

In order to create a new email in Emma, you'll need to either navigate to the "Home" page for your subaccount or to the "Campaigns" page. From the homepage, you'll see a blue button on the right hand side of the page about half way down that says "Create new campaign," or from the "Campaigns" tab you'll see a blue button in about the same location on the page. If you wish to duplicate a past email locate the email on the "Campaigns" page in either the "Drafts" or "Dent" tabs, then click the gray down arrow located to the right of the mailing and select "Duplicate."

Select either a **Regular** email or an **A/B Test** email.

Selecting a Template

The next step in the process will be to choose a template for your new mailing. If you have chosen to duplicate a past mailing you will skip this step. Your sub-account will be pre-populated with a variety of templates, choose the template that most closely matches the purpose of your email.

Email Editor User Interface

The user interface for the email editor in Emma provides a simple way to manage the most common actions for creating an email. The following is a brief description of what each tool does:

The image shows two parts of the Emma email editor interface. The top part is a 'Create new campaign' dialog box with two options: 'Regular email' (Send a one-off email) and 'A/B Test' (Send 2 options of an email to test which performs best). Below these is a 'Campaign name' input field and 'Cancel' and 'Continue' buttons. The bottom part is the main email editor toolbar, which includes a 'Title of the Email' field, a 'Saved.' status indicator, and buttons for 'SAVE', 'REVERT TO', 'PREVIEW', 'SEND TEST', and 'REVIEW & SEND'. At the bottom of the toolbar are tabs for 'Columns', 'Backdrop', 'Left column', and 'Right column', and a switch for 'HTML' and 'Plaintext'.

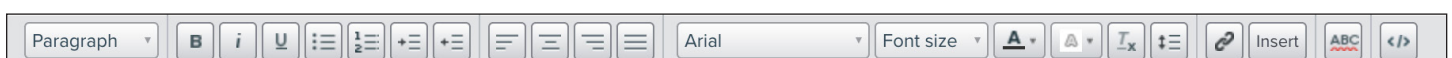
1. **Title of Email** - The title of the email is displayed here. Click on the title to update as necessary.
2. **Show Templates** - The current template for the email is displayed here.
3. **Show Styles** - The current template styles for the email is displayed here.
4. **Columns** - Click on it to change the number of columns that your email uses. Note that changing this value can cause major layout issues.
5. **Backdrop** - This shows the current background color of the email. In order to maintain SHSU brand standards, please keep the color of the background to what it's set to by default.
6. **Template** - Gives the ability to change the background color of the template body, along with the color and style of the left and right borders. In order to maintain SHSU brand standards, please keep these options to what they're set to by default.
7. **Footer** - Gives the ability to change the background color of the template footer, In order to maintain SHSU brand standards, please keep these options to what they're set to by default.
8. **Save Button** - There are four different save options that you can use with the save button, clicking on the downwards arrow to the right of "Save" shows you the options. Use "Save" to commit your changes, use "Save a copy" to create a duplicate of this email, use "Save as template" to add this email to the template selection screen of your sub-account, and select "Save & close" when you are done editing an email.
9. **Revert To** - Clicking on the downwards arrow to the right of "Revert to" shows you the time stamp of all changes that were made during your current session. Select a time stamp to revert the content of your email to that specific time.
10. **Preview** - Click this button to open up a preview mode of the email you're building. This screen gives you the option to view the email as it would appear on various devices. Click "Back to editor" when you're done previewing the email.
11. **Send Test** - This button will launch a pop-up screen that will allow you to send a test email to the email addresses of your choosing. View the sending a test message section for more information.
12. **Review & Send** - Clicking on this button will take you to another page to specify all of the details for scheduling the email you're working on to your audience. View the review and send section for more information.
13. **Submit for Approval** - On the "Review & Send" screen, Click "Submit for approval" when you are ready to submit your email for approval by your subaccount manager.

3.4 - ADDING CONTENT

After you have chosen your template, it is time to start adding content to your email. Most templates that you will use to create emails will have predefined areas for text that you can edit. In order to edit this text, let's first familiarize you with the text editing tool bar.

Text Edit Toolbar

In order to make the text edit tool bar appear, you'll need to click on some of the pre-defined text in the template. If the template you're using has a drag & drop layout, you'll first need to drag a text field into



the email and then select the pre-defined text.

From left to right the text edit tool bar contains the following options: **style set**, **bold**, **italic**, **underline**, **un-ordered list** (bulleted list), **ordered list** (numbered), **text indent**, **text outdent**, **left align**, **center align**, **right align**, **justify**, **font-family**, **font-size**, **text color**, **text background color**, **remove formatting**, **line height**, **hyperlink**, **insert**, **spell check**, and **code**. The basic text formatting options all work as they would in Microsoft Office or similar word processing software. There are, however, a few tools that require a bit more explanation.

Strip Formatting

The strip formatting button is a special tool that removes all extra code, font-styles, formatting or meta-data from text.

Insert Hyperlink

Hyperlinks in Emma work fairly similar to how they work in any word processing software, but there are a few more possibilities within Emma to explore. With the hyperlink tool in Emma, there are four different types of links that you can insert: URL, email address, anchor, and document.

URL Link

1. To insert a URL, first highlight the text you'd like to link and then click on the link icon.
2. This will open a pop-up window, by default the URL tab will be selected.
3. Enter the URL for the hyperlink into the URL text field.
4. Add a "Link Name" which is useful in identifying where people click in your email when looking at the response/analytics of the mailing.
5. The last field is a tool tip which will show the text you enter when a user hovers their mouse over the link. This is important for ADA, screen readers will read this section to the user.
6. Click "Insert" and the link will be added to your email.

The screenshot shows a 'Link to' dialog box with four tabs: URL, Email address, Document, and SurveyMonkey. The URL tab is active. Below the tabs are three input fields: 'URL' containing 'http://www.example.com', 'Link name' containing 'A reference to track clicks', and 'Tooltip' containing 'Show this text on hover'. At the bottom right are 'INSERT' and 'Cancel' buttons.

Email Address Link

1. To insert a link for an email address, first highlight the text you'd like to link and then click on the link icon.
2. This will open a pop-up window, by default the URL tab will be selected. Select the email address tab instead.
3. Enter the email address for the hyperlink.
4. If you want the email subject to automatically populate when a user clicks on the link, enter that subject in the second field.
5. Add a "Link Name" which is useful in identifying where people click in your email when looking at the response/analytics of the mailing.
6. The last field is a tool tip which will show the text you enter when a user hovers their mouse over the link. This is important for ADA, screen readers will read this section to the user.

7. Click “Insert” and the link will be added to your email.

Anchor

The Anchor option will only appear if you have created an anchor previously. To create an anchor, use “Insert” on the text edit toolbar.

- 1) Highlight the text that you would like to create an anchor link for and then click on the link icon.
- 2) Choose the anchor for your hyperlink from the “Choose anchor” drop down menu.
- 3) Add a “Link Name” which is useful in identifying where people click in your email when looking at the response/analytics of the mailing.
- 4) The last field is a tool tip which will show the text you enter when a user hovers their mouse over the link. This is important for ADA, screen readers will read this section to the user.
- 5) Click “Insert” and the link will be added to your email.

Document Link

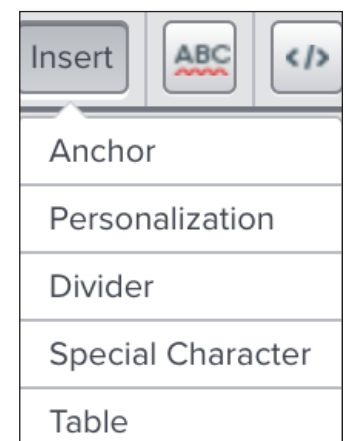
- 1) To insert a link to a document, first highlight the text you’d like to link and then click on the link icon.
- 2) This will open a pop-up window, by default the URL tab will be selected. Select the document tab instead.
- 3) Either use the “Choose Document” menu to locate the document for your hyperlink, or upload a new document to link to by clicking “Upload.” Navigate to the document, and then click “Open.”
- 4) Add a “Link Name” which is useful in identifying where people click in your email when looking at the response/analytics of the mailing.
- 6) The last field is a tool tip which will show the text you enter when a user hovers their mouse over the link. This is important for ADA, screen readers will read this section to the user.
- 7) Click “Insert” and the link will be added to your email.

Insert Tool

Another useful tool in the Emma email editor is the insert tool. This tool allows you to insert either an anchor, a personalization tag, a divider, a special character, or a table. The following is a step by step guide on how to use each of these tools.

Anchor

- 1) Position your mouse cursor on the page where you would like to create an anchor.
- 2) Click on the “Insert” button in the toolbar.
- 3) Give your anchor a name.
- 4) Click “Insert” and the anchor will be added to your email.
- 5) There will now be an anchor icon where you placed the anchor.
- 6) Click on the icon to either edit or delete the anchor.



Personalization

Personalization tags are little bits of code that you place within your email that will customize the email for the recipient. For example, the following bit of code: [% member:first_name default="Bemarkat" %] will insert the first name of the person receiving the email wherever this code is placed. If there is no first name listed for the member, the default value, in this case "Bemarkat" would be displayed instead of the first name. You can choose to insert any custom field in your audience in addition to generic options such as dates and unsubscribe/manage subscription URL's.

To insert a personalization tag, take the following steps:

- 1) Position your mouse cursor on the page where you would like to insert the personalization tag.
- 2) Click on the "Insert" button.
- 3) Select "Personalization" from the drop-down.
- 4) This will place the personalization code into the email editor and reveal two additional fields to configure the personalization tag, "Field" and "Placeholder."
- 5) Choose the type of personalization tag in the "Field" drop down.
- 6) In the "Placeholder" field, enter the default text you'd like to be displayed if a user account does not have information for the field you've chosen.
- 7) Once you've configured the field and placeholder your personalization tag is done and you can continue editing your email.
- 8) To edit the personalization tag, just click on the code in the email body and the personalization fields will appear again in the same place.

Divider

- 1) Position your mouse cursor on the page where you would like to insert a horizontal divider.
- 2) Click on the insert button.
- 3) Select "Divider" from the list.
- 4) This will place a divider in the location of your mouse cursor.

Special Character

- 1) Position your mouse cursor on the page where you would like to insert a special character.
- 2) Click on the special character that you would like to insert.
- 3) This will place the special character you clicked on in the location of your mouse cursor.

Table

The insert table option will allow you to create tabular information as needed. For example, tables are good for displaying information similar to that of an excel spreadsheet.

- 1) Position your mouse cursor on the page where you would like to insert the table.
- 2) A new button will appear directly below the insert button that looks like a table, click on this button.
- 3) A new tool will open that allows you to drag out how many columns and rows you'd like in the table that you're creating.
- 4) Once you click, the table will be inserted with the rows & columns you've specified.

5) From here, you can enter data into the table. If you need to add or delete a row or column, click on the gray box in the beginning of the row or column and use the buttons that appear in the toolbar to insert or delete a row.

View Source Code

In the event that you need to insert some basic HTML code into your email, click on the view source button that is located on the far right of the toolbar. This will launch a pop-up window that you can edit in HTML. Once you've made the edits that you need to make to the HTML, click on "Save" or if you don't need to commit the changes that you've made click on "Cancel."

The HTML section is very particular and will cause issues if the HTML code added is not valid. This tool is recommended for advanced users only.

3.5 - DRAG & DROP CONTENT BLOCKS

Drag and Drop templates allow you to add different types of content blocks at your discretion to the general templates.

Content Block Types

There are several different content blocks that you can use as needed. They are as follows:

Image

This content block creates a full width area for a single image. Contents of this block can be aligned to the left, right, or centered.

Images

The images content block creates a full width area for up to three different images per row. You can delete up to two of the images if you desire.

Text

Creates a full width area for text. Contents of this block can be aligned to the left, right, centered, or justified.

Left

This content block type creates an area for an image to be left aligned with a paragraph of text that will wrap around it.

Right

This content block type creates an area for an image to be right aligned with a paragraph of text that will wrap around it.

Button

The button content block inserts a clickable button that can link to any URL of your choosing. Button size, shape, color, and font are all customizable.

Divider

The divider content block will insert a horizontal rule across the width of your email.

HTML

The HTML content block will insert an area into your email for custom HTML code.

Follow

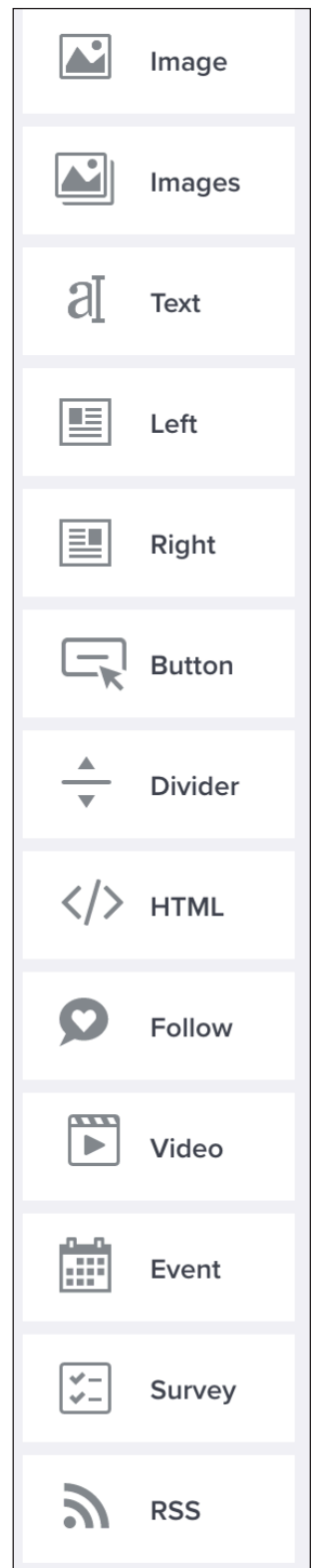
The follow content block allows you to insert social media follow links.

Video

The video content block allows you to place a link to a YouTube or Vimeo video directly into the email. This widget will take a snap-shot of the video and create a static image with a play button. When clicking on this in the final email, recipients will be redirected to YouTube or Vimeo to watch the video.

RSS

RSS stands for “Really Simple Syndication” and is a way to easily feature a list of headlines or content from another site in an email campaign. Go to the “Campaigns” section in your account and either create or open a campaign. Click and drag the RSS block from the editor on the left and drop it into



your campaign in the place you'd like using the color codes as a guide. In the "Import RSS Content" box that appears, paste in an RSS link to the Feed URL field. Choose the number of items that you'd like to see displayed on the campaign. Then check the boxes next to the aspects you'd like to feature: Title, Content, Published date, or Read more link. Review your selections and when you are ready, click "Save". The feed will immediately show in your campaign.

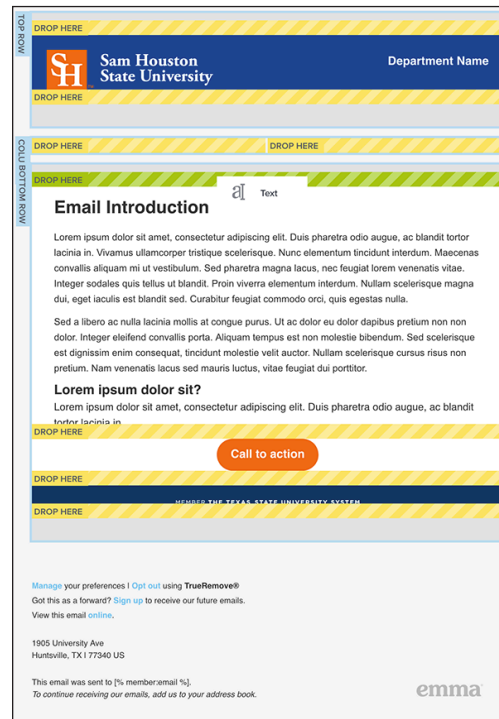
Adding Content Blocks

The first step in using a drag and drop template is to place some content blocks in the body of the email. In order to do this, Click on the content block type that you'd like to place, and drag it into the main body of the email. You'll know that you've dragged the content block to a correct location when you see a yellow horizontal bar turn green (Figure 3.7). With the content block properly placed, you can now add content.

Moving Content Blocks

In order to move a content block, take the following steps:

1. Locate the content block that you'd like to move.
2. Hover your cursor over the content block.
3. Once you hover over the content block, a menu will appear
4. Once this menu appears, click and hold down the four directional arrow icon and move the content block to the desired location.
5. When you've moved the content block to a valid location, you'll see a yellow horizontal bar turn green Release the mouse button and the content block will be placed.



Adjusting Properties of Content Blocks

Once a content block is placed, there are various styles and settings that you can edit.

Styles Menu

The styles menu allows you to adjust various visual properties of a content block such as background color, margin, padding, and border. These properties are generally the same for all content block types.

Most of the properties utilize a slider bar to adjust the properties equally. Sometimes, properties like margin and padding benefit from being able to be more precise. For example, you might want a padding at the top of a content block to be 10 pixels, but only 5 pixels at the bottom. To make these separate adjustments, click on the gear icon at the bottom left of the styles menu and the slider bars will change into four separate boxes where you can manually change the values for top, bottom, left, and right.



Settings Menu

The settings menu allows you to adjust various properties of a content block that are unique to that specific type of content block. These settings allow you to turn text on or off, change the wrapping behavior of text around images, turn images on (Effectively turning it into a “right” or “left” content block), adjust the number of images you can set for the content block, turn off smart sizing, add captions, and set alignment. Different content blocks have different options in the settings menu, be sure to tweak these as necessary.

Duplicating Content Blocks

In order to duplicate a content block, take the following steps:

1. Locate the content block that you’d like to duplicate.
2. Hover your cursor over the content block.
3. Once you hover over the content block, a menu will appear.
4. Once this menu appears, click on the double rectangle icon.
5. This will create a copy of the content block and place it directly below the original. Reposition the duplicate as needed.

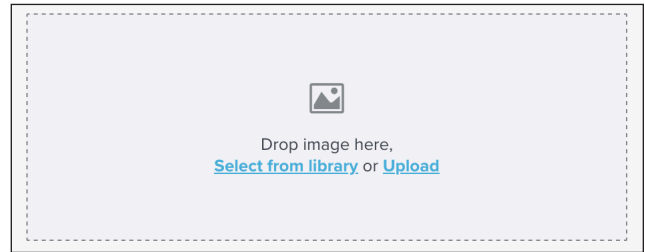
Deleting Content Blocks

In order to delete a content block, take the following steps:

1. Locate the content block that you’d like to delete.
2. Hover your cursor over the content block.
3. Once you hover over the content block, a menu will appear.
4. Once this menu appears, click on the garbage can icon and the item will be deleted.

3.6 - ADDING AN IMAGE

1. In an image content block, click on “Select from library.”
2. A new window will pop-up that allows you to choose an image to insert.
 - a. If your image has already been uploaded to your sub-account, navigate to the image of your choice.
 - b. If your image has not already been uploaded to your sub-account, select the “Upload” button at the top of the images window. Navigate to the image you’d like to upload and click “Open”.
3. On the next screen enter a link for the image if desired. For ADA purposes you must enter descriptive text for the “Alternate Text”. This is text that will show up if an email recipient has disabled images. Including this will help with the deliverability rate of your email.
4. Click on “Save” to insert the image.



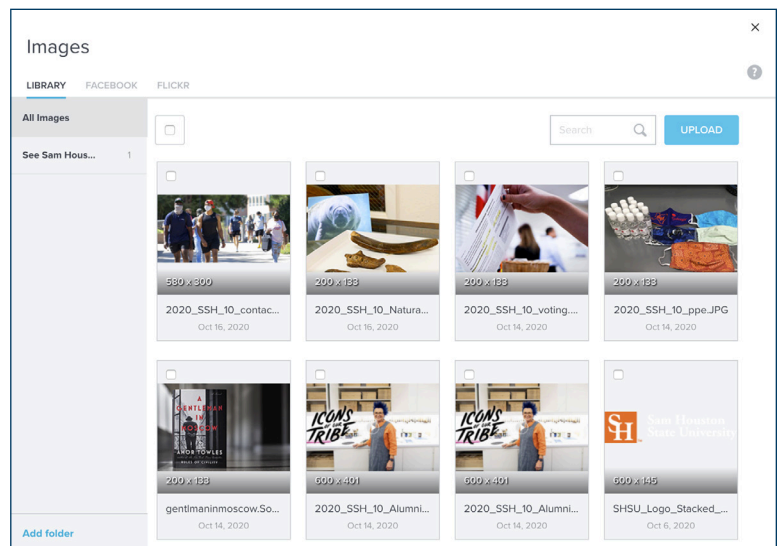
Note: If you do not want to have an image in the image area, just delete the placeholder image and leave the area blank. The area designated for an image will not show up in the final email if it is left blank.

Adding a Folder

In order to keep the images in your sub-account organized, we suggest using folders to categorize and store your images. This reduces clutter and improves your own work-flow.

To add a folder, take the following steps.

- 1) Choose a template that contains a predefined image or, if using a drag & drop template, drag a new image widget into the email body.
- 2) Click on the image widget to open up the images screen.
- 3) On the bottom left of the images window, click on “Add folder.”
- 4) Enter a name for the new folder.
- 5) Select “Save” to create the folder, or “Cancel” to exit.



Adding an Image to a Folder

Now that you have created all the folders that you would like, it's time to move images into them. To do this, follow these steps:

1. Click on the image content block to open up the images screen.
2. Locate the image that you’d like to move by clicking on the “All Images” link at the top of the folder list on the left.

3. Find the image you'd like to organize and click on the checkbox in the upper left hand corner of that image. You may select multiple images at once if you need to move more than one image.
4. Click on the "Add to folder" button, and select the folder you'd like to add the image to from the dropdown, and that's it!

Deleting an Image

To delete an image, follow these steps:

1. Click on the image content block to open up the images screen.
2. Locate the image that you'd like to delete and click on the checkbox in the upper left hand corner of the image.
3. Click on the "Delete" button that appears in the window.

3.7 - SENDING A TEST MESSAGE

Once you have your email crafted and are ready to send it out, it is VERY important that you send a test email prior to sending the campaign. Test emails help you to identify any potential issues with your email, ensure proper formatting, and give you another opportunity to catch anything that is out of place. To send a test message, follow these steps:

1. From the "Campaigns" tab, open the email you need to test.
2. In the upper right corner of the screen, click "Send test."
3. Upon clicking the send test button, a screen will pop-up that says "We're proofing your email for common issues." Emma will check for things like broken links, problems with personalization tags, and the likelihood your email might get filtered to spam.
4. It is a best practice to fix these issues before you send a test message. Click on "Fix Issues" to view the issues that Emma has detected.
5. Most of the issues that Emma will detect are related to improving deliverability and click-through rates of your email. Review the proofing issues and click "Send test" when you're ready.
6. Complete the fields needed to send the email (i.e. subject, reply-to).
7. There are only two fields that are not self explanatory: Preheader text and Note. Preheader text is the short summary text that follows the subject line when an email is viewed in the inbox. Many mobile, desktop and web email clients provide them to tip off the reader on what the email contains before they open it. The Note field is a short message that you can include at the top of the test message. Use this field to send a message to those receiving the test email.
8. In general, it is best practice to select "Send only HTML mailing" from the "Email Format" drop-down menu.
9. Once you've completed all of the fields, select "Send Now" at the top of the "Send a test" screen and your test message will

Send a test
The word 'TEST' will be added to the subject.

To
Start typing to search your audience for contacts, groups, and segments.
0 of 10 recipients added.

Subject
Type your subject line here...

Preheader text
Type your preheader line here...
Characters remaining: 75

Note
This message will appear at the top of your email.

Sender name
Sam Houston State University
☐ Make this the default sender name

Sender email
marcom@shsu.edu
☐ Make this the default sender email
Your Sender and Reply-to email address must be working, monitored mailboxes in order to comply with federal regulations.

Reply-to

Google Analytics

Email format
Send only HTML mailing

Signup form
Your Default Signup Form

We're proofing your email for common issues.

We're checking for things like malicious links, problems with personalization tags, and the likelihood your email might get filtered to spam.

be delivered. (It can take up to 30 minutes to receive the test. If you still don't receive a test email, check the junk folder in your mailbox).

10. Once the test message has been received, please check to make sure there are no errors in the message and that everything looks correct.

3.8 - REVIEW & SEND

1. The first step in sending your campaign is to choose the recipients for the email. Recipients can be either individual email addresses, contact groups, or contact segments. If you would like to exclude an audience segment from receiving your message, click on the "Exclude an audience segment" and then select the segment to exclude from the drop down menu.
2. Next enter a subject line for your email. If you would like to experiment with different subject lines to see which version gets the best response, click on the "Switch to Split Test" button. Subject line variations will be sent to 20% of your recipients. The results will be tracked over the next four hours. You can choose to send an equal amount of emails for each subject line or to auto-send the winning variation to the remaining 80% of your recipients.
3. Next enter the Preheader text. Preheader text is the short summary text that follows the subject line when an email is viewed in the inbox. Many mobile, desktop and web email clients provide them to tip off the reader on what the email contains before they open it.
4. Enter your Sender name and Sender email address (These default values can be adjusted in your sub-account settings). These **MUST** be shsu.edu email addresses. We do not have authorization to send on the behalf of another organization.
5. Select your format (Generally you should select "HTML").
6. If you would like to have a separate reply-to address for your email, click the checkbox and enter the desired email address.
7. Review your email at this point to make sure all the information you've entered is correct.
8. If you're ready to send the email, click "Submit for approval" when you are ready to submit your email for approval by the subaccount manager.

The screenshot shows the 'Title of the Email' review and send interface. At the top, there's a title bar with 'General Template - Legacy' and buttons for 'SAVE', 'PREVIEW', and 'BACK TO EDITOR'. The main area is divided into two columns. The left column shows a preview of the email template, which includes a header with the Sam Houston State University logo, a subject line, and a body with an 'Email Introduction' section and a 'Learn More About Us' button. Below the preview, there are settings for 'FORMAT' (HTML recommended), 'SIGNUP FORM' (Your Default Signup Form), and 'GOOGLE ANALYTICS' (ADD GOOGLE ANALYTICS). The right column contains fields for 'Choose recipients', 'Enter a subject line', 'Enter preheader text' (with a character count of 75), 'Sender name' (Sam Houston State University), and 'Sender email' (marcom@shsu.edu). There are also checkboxes for 'Exclude an audience segment', 'Make this the default sender name', 'Set a separate reply-to email address', and a 'SWITCH TO SPLIT TEST' button.

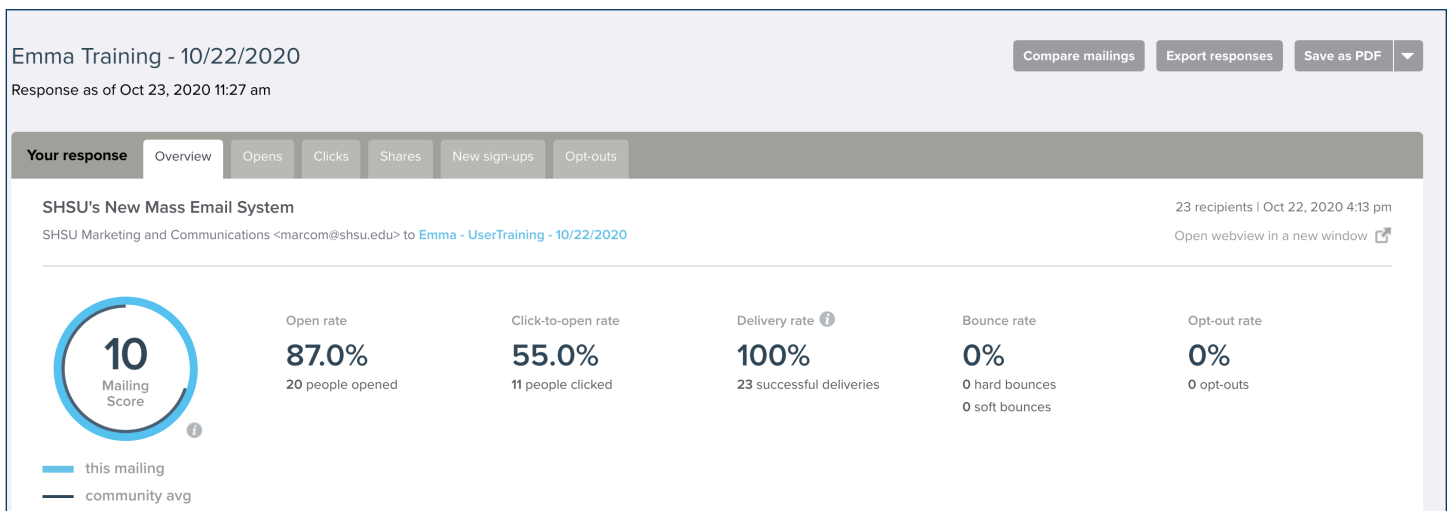
4. RESPONSE

The response section of Emma provides a wealth of information regarding the analytics of how your mailings have performed. Open rates, click rates, delivery rates, opt-outs, shares, opens by devices, opens by client, and click analysis are some of the basic metrics that you are able to see data for.

Within Emma, you are able to compare mailings to see the effectiveness of one message to another. Under the “Response” tab, on the left side navigation, select “Compare mailings.”

The information provided by the Response section allows you to tweak future mailings to get the most out of your campaigns.

To view the responses for your mailings, click on “Response” on the top navigation bar. Once you have done so you’ll see your response homepage, which lists all of your past mailings. This screen is separated into three tabs by the type of mailing - Sent, Test and Automated. The response data that is collected is the same across all three tabs.



4.1 - COMPARE MAILINGS

To compare mailings, on the left side navigation, select “Compare mailings.” of the “Response” tab. On the next screen you will see a list of all “in progress” and “completed mailings.” Select the checkbox next to the mailings you’d like to compare, you must select at least two. Once you have them selected, click on the compare button in the upper right corner. You have three different comparisons to choose from: a Performance Summary, which is a detailed report of all the response data for the mailings; a Click Summary, which shows you the number of clicks for each email; and a Classic Summary, which focuses on some of the higher level metrics as a comparison. Once you select the type of summary, the file will be downloaded and you can view it using Excel or another spreadsheet editor.

[Download](#)

Performance summary

A detailed report of the response data for the emails you've selected.

[Download](#)

Click summary

See how many clicks each link received in the emails you've selected.

[Download](#)

Classic summary

Quickly compare the response results for up to five mailings.

4.2 - YOUR RESPONSE DETAILS

From the Response tab, click on an individual mailing, which will take you to the Response Overview for that mailing. The overview shows you all of the major data points that were collected for your mailing. For a more detailed breakdown of Opens, Clicks, Shares, New sign-ups and Opt-outs click on the tabs.

Save This Tab as a Segment

Each one of the tabs (Opens, Clicks, Shares, New sign-ups, and Opt-outs) can all be saved as a segment. In order to do this, select the tab your audience segment and click on the “Save this tab as a segment” button. This will create a new segment and name it in this format: “Name of Email - Name of tab - Date”. You will automatically be redirected to the new segment once you create it. The segment can also be viewed and edited on the “Audience” tab.

New sign-ups

In the “New sign-ups” tab you are able to see any new users that have signed up through your latest mailing. If you are using your default sign-up form for the mailing, these users will be added to the “New subscribers” audience group. It is a good idea to go to the “Audience” tab and move those new subscribers into an appropriate mailing group after they have subscribed.

Opt-outs

The “opt-outs” tab shows you any users that have opted out from your mailing. These people will automatically be removed from any future mailings.

5. ADDITIONAL RESOURCES

The “Help” and “Settings” buttons are located in the upper right corner of the screen.

5.1 - HELP

The “Help” button provides a direct link to http://support.e2ma.net/Resource_Center which has a wealth of information on how to use the Emma email platform. Any information that you cannot find in this training manual will likely be located there. In the event you cannot find the answer to your question in this training manual or the Emma Resource center, please direct your question to Marketing and Communications.

5.2 - SETTINGS

Within the “Settings” page there are two tabs with information that you may configure. In the “Sender Info” tab, there are a variety of fields that you may customize to fit the needs of your department. These values are pulled automatically into your email footer and various other fields throughout the sending process.

The “Account” tab allows you to modify the primary contact in your department for your email sub-account. **Do not change the subaccount name.**