

## **EMAIL MARKETING INSTRUCTIONS – QUICK GUIDE**

The broadcast email function of TigerNet has always allowed class officers to quickly and easily keep classmates and affiliates informed of class activities. With the upgraded suite of services provided by the new TigerNet, volunteers will now have additional functionality, including the ability to send html emails, schedule email campaigns, and access metrics on the reach of your message.

A complete usage manual is available for all volunteers. To start using the essential elements of the system, ***please review and follow the steps below to send an email message to your class:***

- Go to the TigerNet Administration Tool web site at: <https://admin.alumniconnections.com/olc/admin/PRU/admintool/>
- Log in using your class user-ID and Password. Your user-ID has been restricted to access only the records of your classmates and class affiliates, including honorary classmates and widows/widowers.
- The screen will refresh with the Administration Tool landing page. Click “Email Marketing” under the Community Maintenance heading in the left navigation bar.

There are **FIVE STEPS** to generating and sending an email marketing campaign:

1. **Create & Manage Lists** – choose from a pre-set mailing list or create a new list
2. **Create & Manage Content** – choose your content template or create new content
3. **Address & Assemble** – join together the appropriate mailing list and content
4. **Send & Schedule** – schedule the email to broadcast immediately or in the future
5. **Reports** – review outcomes of the broadcast

### **1. CREATE AND MANAGE LISTS:**

Three frequently-used recipient lists are pre-loaded in the system:

- **Undergrad Alumni** – includes all members of your class
- **Undergrad Alumni & Honorary Classmates** – same criteria as above, but includes honorary classmates, as well
- **Undergrad Alumni, Honorary Classmates & Widow/ers** – same criteria as above, but also includes widow/ers

To use one of these pre-loaded lists, proceed to Step 2 to create your message (you will select the list you wish to use in Step 3). To create a new mailing list, please see the FAQ.

PLEASE NOTE: If members of your class have indicated to the University that they do not wish to receive broadcast e-mails, their e-mail addresses WILL NOT be included in these lists.

### **2. CREATE AND MANAGE CONTENT:**

Click on the “Create and Manage Content” tab at top of page. Five frequently used template/sample messages are pre-loaded in the system:

- **Class Basic E-mail Message** (template)
- **Class Basic E-mail Message w/Header and Footer** (template)
- **Class Newsletter** (template)

A. To use one of these pre-loaded templates:

## **EMAIL MARKETING INSTRUCTIONS – QUICK GUIDE**

- 1) Copy the template you wish to use by clicking on the “Duplicate” link to the right of the appropriate template.
  - 2) Rename the content (for tips in creating a content naming convention, see the FAQ.)
  - 3) Uncheck the “Mark as a Template” box (to understand why, see the FAQ).
  - 4) Insert new content where needed. (In general, red text should be rewritten and re-colored as black.)
  - 5) Click on the “Preview HTML” and “Check Links” buttons to check your work. Proceed to step 2-C.
- B. To create your own message from scratch:
- 1) Select the “Create content” button.
  - 2) Name the content (for tips in creating a content naming convention, see the FAQ.)
  - 3) Uncheck the “Mark as a Template” box (to understand why, see the FAQ).
  - 4) Note you have two tabs – “HTML version” and “Text version.” On HTML page, select HTML editor (“default” is encouraged”) from the drop-down menu.
  - 5) Write in your content, leaving the required footer with removal instructions at the bottom.
  - 6) Use HTML Data Tags where desired to personalize email.
  - 7) Click on the “Preview HTML” and “Check Links” buttons to check your work. Proceed to step 2-C.
- C. The same content needs to be entered or created for the Text version for those alumni without HTML capability. While still on the HTML tab, click on the “Copy HTML to text version” button, and then click on the “Text version” tab to edit out any html remnants or insert new content. [Note – Data Tags will also work in the text version.] Click on the “Preview Text” button to check your work. PLEASE NOTE – CAN-SPAM regulations require a unsubscribe option. If you delete the Removal Instructions at the bottom of the page, the system will not allow you to send your e-mail.
- D. Click on “Text Version” tab to review the non-HTML version of your message.
- E. Click on the “Save content” button at the bottom of the screen.
- F. Proceed to Step 3.

### **3. ADDRESS & ASSEMBLE:**

- A. Click on the “Address and Assemble Email” tab at top of page.
- B. Click on the “Address and assemble a new email” button.
- C. Enter a name for your email for scheduling and reporting purposes – remember to be specific and follow naming convention (see the FAQ).
- D. Enter all required information on page (necessary fields are shown in red at the bottom).
  - 1) For the “From” and “Reply-to” addresses, delete the provided email address and insert your personal or class email address.
  - 2) For the “To” Field, click on the “More Information” Link,” then cut and paste each of the tag language cells into the “To” Field, leaving a single space between the tags. These tags determine whether the message greeting will contain the recipient’s first name, first and last name, or first and last name plus class year. PLEASE NOTE that the class year tag will display the entire class year, not the abbreviation (e.g., 1993 instead of ‘93.) This will be changed ASAP, but for now, use this tag under advisement.
  - 3) Highlight “News” in the Available Categories box and click “Select”.
- E. For “Select email content,” choose the email content you just created and/or wish to send. For “Select recipient list,” choose one of the pre-loaded lists or a list you created.
- F. Click on the “Save this email” button at the bottom. The screen will refresh to the main “Email Marketing” page with your email listed at the top.
- G. Though not required, it is highly recommended that you “Check spam rating” to determine the likelihood of this email being flagged as spam. If your rating is high, consider eliminating some links or questionable language.
- H. Proceed to Step 4.

## **EMAIL MARKETING INSTRUCTIONS – QUICK GUIDE**

### **4. SEND & SCHEDULE:**

- A. Click on the “Send & Schedule” tab at top of page.
- B. To send your message immediately, click on the “Send a broadcast email right now” button. If you would prefer to schedule the message to go out at a later time or date, select the date on the calendar, then select the time for the email to be sent.
- C. A pop-up box will ask you to complete the following three steps:
  - 1) Select/highlight the email you wish to send.
  - 2) Select a “recurring option” (default is “does not recur”).
  - 3) Click the “Schedule this email now” button.
- D. ALMOST DONE... Once your email appears on the calendar, click the “Approve” link at the bottom of the text to actually send the message.

### ***ONCE THE MESSAGE HAS BEEN SENT...***

**5. REPORTS:** The new system allows class officers to view statistics and reports about the success of the email campaign.

- A. Click on the “Reports” tab at top of page.
- B. Click on the “View Summary” link for the email in question. The following types of data will be available to you:
  - Start and stop times for the message delivery
  - Recipient details (total number of messages sent, total number of messages opened, etc.)
  - Recipient errors (number of list of bounce-backs and notes about other sending issues)
  - Link tracking (count and listing of recipients who clicked on any embedded links, including “unsubscribe”)

\* \* \* \* \*

### **FREQUENTLY ASKED QUESTIONS**

**Q: *What name and password should I use to log in?***

A: Each class has been assigned a user-ID and password. Any of your officers who use broadcast email will utilize this same user-ID and password. Do NOT use your personal TigerNet account NetID and password; the system is no longer calibrated to match individual alumni to their classes.

**Q: *Can I change my user-ID and/or password?***

A: The class user-ID has been preset and cannot be changed. The password may be changed, however, any changes you make MUST be communicated to your fellow class officers (who will need to use the same password when they access the system), as well as the Class Affairs staff at the Office of the Alumni Association.

**Q: *I have been trying to log in to the account and now I am locked out. What happened?***

A: For security purposes, three failed attempts to log in will lock your account for up to two hours. Please be very careful when typing in your log-in and password.

## **EMAIL MARKETING INSTRUCTIONS – QUICK GUIDE**

**Q: I want to create my own specialized list, instead of using one of the pre-loaded options. What do I do?**

A: If you wish to create a new mailing list, follow these steps:

1. Click on the “Create & Manage Lists” tab at the top of the page, then click the “Create a Recipient List” button.
2. Use Standard Query Builder tab to create simple lists (e.g., “members of the Class of 1993 who live in NYC”); use Advanced Query Builder to create lists based on more complex criteria (e.g., “female members and affiliates of my class who live in Orange County”). Remember, you are already restricted on the basis of your User-ID to access only the records of your classmates and class affiliates.
3. Name your list (for tips in creating a naming convention, see the FAQ.)
4. Choose your Search Criteria by clicking on the + button beside each data table to display available fields. (Please refer to Email Marketing for Staff and Volunteers manual for detailed information about search criteria options.)
5. Save List.
6. The page will refresh and your list will appear at the top of the returned page.
7. Click “Calculate” to determine the number of records in your list. [Note – The count on this page does not remove opt-outs or blank emails (which is completed in Address & Assemble tab), so your final number may be lower.]
8. Click on “Display” to show the first few records in your list (make sure these records fit the criteria you selected).
9. The page refreshes to the landing page. Your new list is at the top of the page. Proceed to Step 2 of this Quick Guide to create your message (you will come back to your list in Step 3).

**Q: How should I create a naming convention for recipient lists and content/messages?**

A: Because the lists and email messages can be reloaded and used in future campaigns—and because all officers within a class will be able to see and utilize work of their fellow class volunteers—it is best to follow a clear naming convention for both recipient lists and message content. It is important to be clear and specific about what information has been pulled in a list or promoted in an email; for instance, “classmates and affiliates 8/2009” is much clearer than “class of 1993” when describing a list; similarly, “05/2011 Class Dinner Save-the-Date” is more recognizable than “May Event.” In a class where multiple people access this site, it may also be useful to add your initials, so it is very clear who created the specialized list, report or email.

**Q: When creating new email content, what does the “Mark as a Template” box do, and why should I “uncheck” this?**

A: If you leave the “Mark as a Template” box checked (which is the default), that message cannot be changed moving forward. It also will not appear as an option when you try to send it.

**Q: Can I write my message in rich-text or attach graphics or images?**

A: Yes, a message can be written in rich-text using the HTML feature within “Create and Manage Content.” You may also embed a graphic in the text of the email – and even enable that graphic to be a link to another webpage.

**Q: Can I write attach a file or invitation to my message?**

A: It is not possible to add attachments to email messages due to potential spam and virus issues. It is possible to upload PDFs or Word documents using the File Manager, then insert a link to this document in the email content. (Please refer to the Email Marketing for Staff and Volunteers manual for further details on this.) However, the best practice is for the information from a document be cut/paste and/or transcribed into the text of the email itself.

**Q: I just want to send an HTML email – why is a text version necessary?**

A: If you want to send HTML emails, it is also required for you to prepare a text version. Many people have their email configured to receive only text messages, so this will ensure your message reaches more of your market. It is possible to send only a text email, but if you want to send HTML, you must prepare a text version, too.

## **EMAIL MARKETING INSTRUCTIONS – QUICK GUIDE**

***Q: Is there any required language that must be included in email messages?***

A: An unsubscribe link must appear on every email. These are already included in the footer of the template messages and when a new, non-template message is created.

***Q: Why does a footer automatically appear in my message? Can I change the language in the pre-loaded footer?***

A: The footer includes a mandatory unsubscribe link. If you remove this, your message will not be sent. However, you may change the other language in the footer, if you wish to do so.

***Q: What are “data tags”?***

A: Data tags are used to pull personalized information into a template email. For instance, you can address a message to individuals (e.g., “Dear John,”) using data tags for “First Name” pulled from your entire recipient list. Please refer to Email Marketing for Staff and Volunteers manual for more detailed instruction on using data tags.

***Q: Why is there a BCC option in the address and assemble section?***

A: This “Blind Carbon Copy” option is provided to give the sender flexibility to send the message to an additional list of email addresses. For many reasons, some classes keep a separate list of people who normally would not be coded to receive messages from that class, but would like to do so (e.g., honorary classmates, classmates who have shared their e-mail address with the class but not the university, etc.) This is way to send the message only once, instead of having to forward a received copy. Please note that recipients of a BCC will see the content but not any personalization resulting from data tags. In addition, the word “sample” is automatically added to the subject line of bcc e-mails, resulting in an appearance like this: “\*\*\* SAMPLE \*\*\* Class of '72 update, 9/1/09”.

***Q: Does the Office of the Alumni Association see the messages that get sent through this system?***

A: Yes. Anytime a message is sent by a class officer, the Class Affairs team automatically is sent a copy for record keeping purposes.

***Q: Is there a time limit to my session?***

A: No – your session will not time out.

***Q: I'm still confused – my question is not answered here. Where can I find more information?***

A: For more detailed information on all aspects of creating and sending an email broadcast, please refer to the Email Marketing for Staff and Volunteers manual or contact the Class Affairs staff at the Office of the Alumni Association.

### **A FRIENDLY POLICY REMINDER**

All personal information of alumni and affiliates is confidential and may only be used for official University class business. Therefore, this e-mail marketing tool may only be used for official University class business. It is your responsibility to protect the data against unauthorized use. In addition, there shall be no transfer of the data to a third party without permission from the Office of the Alumni Association.