E-MAIL MARKETING INSTRUCTIONS – QUICK GUIDE

The broadcast e-mail function of TigerNet has always allowed regional association officers to quickly and easily keep Princeton constituents informed of local activities. With the upgraded suite of services provided by the new TigerNet, volunteers will now have additional functionality, including the ability to send html e-mails, schedule e-mail 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 e-mail message to your region:***

- Go to the TigerNet Administration Tool web site at: **https://admin.alumniconnections.com/olc/admin/PRU/admintool/**

- Log in using your regional association user-ID and Password. Your user-ID has been restricted to access only the records of constituents with preferred addresses in your PAA region.

- The screen will refresh with the Administration Tool landing page. Click "E-mail Marketing" under the Community Maintenance heading on the left navigation bar.

There are **FIVE STEPS** to generating and sending an e-mail 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 e-mail to broadcast immediately or in the future
5. **Reports –** review outcomes of the broadcast

1. CREATE AND MANAGE LISTS:

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

- **Standard Regional Pull** – includes all alumni, parents of current students, and widows in your region
- **Standard Regional Pull – Without E-mail Addresses** – same criteria as above, but only those who do not have an e-mail address in the system
- **Regional – All Alumni** – includes all undergraduate and graduate alumni in your region
- **Regional Parents** – only parents of current students
- **Regional Undergraduate Alumni** – only undergraduate alumni
- **Regional Graduate Alumni** – only graduate alumni
- **Regional – Women** – only female undergraduate and graduate alumnae

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.

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:

- Basic Header and Footer (template)
- Basic Footer Template (template)
- Save-the-Date Announcement (template)
- Single Event Promotion/Announcement (template)
- Multiple Event Promotion/Newsletter Style (template)

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A. To use one of these pre-loaded templates:
   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.) If you wish to cut/paste content into the system from a Word document, see the FAQ.
   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) Optional – Use HTML Data Tags to personalize e-mail (e.g., "Dear <<First Name>>).
   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.
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 E-mail" tab at top of page.
B. Click on the "Address and assemble a new e-mail" button.
C. Enter a name for your e-mail 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 both the "From" and "Reply-to" addresses, delete the provided e-mail address and insert your personal or association e-mail address.
   2) For the "To" Field, you can put in generic language (e.g., "Topeka Tigers") or use data tags for first/last names by clicking on the "More Information" Link, to cut/paste the tag language cells into the "To" Field, leaving a single space between the tags. [Note – The class year tag is the complete year (e.g. "1993"), not the Princeton abbreviation (e.g. "*93").]
   3) Highlight the appropriate categories among those available (suggested – "Regional Association News" and/or "Regional Association Events") from within the Available Categories box.
E. For "Select e-mail content," choose the e-mail 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 e-mail" button at the bottom. The screen will refresh to the main "E-mail Marketing" page with your e-mail listed at the top.
G. Though not required, it is highly recommended that you "Check spam rating" to determine the likelihood of this e-mail being flagged as spam. If your rating is high, consider eliminating some links or questionable language.
H. Proceed to Step 4.

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 e-mail 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 e-mail to be sent.
C. A pop-up box will ask you to complete the following three steps:
   1) Select/highlight the e-mail you wish to send.
   2) Select a "recurring option" (default is "does not recur").
   3) Click the "Schedule this e-mail now" button.
D. ALMOST DONE… Once your e-mail 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 system allows regional officers to see statistics and reports about the success of the e-mail campaign.

A. Click on the "Reports" tab at top of page.
B. Click on the "View Summary" link for the e-mail 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")

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USAGE POLICY – All personal information of alumni and affiliates is confidential and may be used ONLY for official University business. Therefore, this e-mail marketing tool may be used ONLY for official club communications and 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 of the Office of the Alumni Association.

FREQUENTLY ASKED QUESTIONS

Q: What name and password should I use to log in?
A: Each region has been assigned a user-ID and password. Any of your officers who use broadcast e-mail 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 regions.

Q: Can I change my user-ID and/or password?
A: The regional 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 regional officers (who will need to use the same password when they access the system), as well as your Regional Affairs staff liaison 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.

Q: How do I send an e-mail message to current students?
A: The list of current students from your region is not available through this platform. If you require such a list, please contact your Regional Affairs staff liaison.

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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., "alumni from my PAA who graduated between 2000 and 2009"); use Advanced Query Builder to create lists based on more complex criteria (e.g., "from my PAA, female alumnae and female parents of current students"). Remember, you are already restricted on the basis of your User-ID to access only the records of constituents with preferred addresses in your PAA region.
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 E-mail 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 e-mails (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: I want to create a test list that includes only me. What do I do?

A: Follow the steps to create a specialized list (above), using the search criteria to identify yourself.

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

A: Because the lists and e-mail messages can be reloaded and used in future campaigns—and because all officers within a region will be able to see and utilize work of their fellow regional 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 e-mail; for instance, "undergraduate alumni 2000-2009" is much clearer than "young alumni" when describing a list; similarly, "05/2011 Annual Dinner Save-the-Date" is more recognizable than "May Event." In a region 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 e-mail.

Q: When creating new e-mail 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 e-mail – and even enable that graphic to be a link to another webpage.

Q: I want to compose my message offline and then cut/paste it into the system – what should I do?

A: Pasting in content composed in a word processing application (especially .doc or .docx files from Microsoft Word) may import background clutter you will need to clean up manually. To avoid this, you can either save a Word document as HTML and then import the file using the "Import HTML" button, or compose content in text format and do all of the fancier formatting in the online system.

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

A: It is not possible to add attachments to e-mail 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 e-mail content. (Please refer to the E-mail 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 e-mail itself.

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Q: I just want to send an HTML e-mail – why is a text version necessary?

A: If you want to send HTML e-mails, it is also required for you to prepare a text version. Many people have their e-mail 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 e-mail (see next question) but if you want to send HTML, you must prepare a text version, too.

Q: How do I just send a plain text e-mail?

A: When you are in the Create & Manage content tab, duplicate the "Basic Footer Template" created by *Pruadmin* and go directly to the "text version" tab above the text editor box to compose your message. Then, in the Address and Assemble tab, in following the steps you'll have the option to select "text only" as the type of e-mail. The other steps remain the same.

Q: Is there any required language that must be included in e-mail messages?

A: CAN-SPAM regulations require that an unsubscribe link must appear on every e-mail. These are already included in the footer of the template messages and when a new, non-template message is created. If you delete these removal instructions in the footer, the system will not allow you to send your e-mail.

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.

Q: What happens to the people who are unsubscribed?

A: The names of people who have unsubscribed will still appear in your lists, but their contact information will be missing. They will be stripped out of the recipient list when the message sends. This may result in a slightly lower count than the number given if you "calculate" the number of recipients earlier in the process.

Q: What are "data tags"?

A: Data tags are used to pull personalized information into a template e-mail. 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 E-mail 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 e-mail addresses. For many reasons, some regions keep a separate list of people who normally would not be coded to receive messages from that association, but would like to do so (e.g., they only live in that city a few months per year, or the officers of nearby regions have pledged to share event information with each other). 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.

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 regional association officer, the Regional 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 e-mail broadcast, please refer to the E-mail Marketing for Staff and Volunteers manual or contact your Regional Affairs staff liaison at the Office of the Alumni Association.