

Emma: Getting Started

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Accessing Emma

1. To request access to Emma, follow the steps on the [Mass-Emailing page](#).
2. Logging in to Emma.
 - a. From one.wustl.edu, search for **Emma** and select it when it appears below.
 - i. Or, from a browser, navigate to: [Emma.wustl.edu](https://emma.wustl.edu).
 - b. Use your WUSTL Key to log in.
 - i. More information about logging in using your WUSTL Key and 2FA can be found [here](#).

Navigating the Emma User Interface (UI)

1. Your home screen is where you start after logging in. The main sections of the Emma UI are the top navigation bar, the main window and the calendar.
 - a. If you have campaign data, the main window provides an overall snapshot of the recent activity from your sub-account.
 - b. If you do not have campaign activity yet, there will be two tabs where you can get started directly from the main window:
 - i. [Add your audience](#), where you can import your contacts.
 - ii. [Send your first campaign](#), where you can create a new campaign.

2. The top navigation bar is where you can access the following tabs:
 - a. [Home](#) is your dashboard overview, once you have sent campaigns the mailing averages will appear in the main window.
 - b. [Audience](#) is where you can add and manage your contacts. You can also review any errors and opt-outs.
 - c. [Campaigns](#) is where you will create a new email campaign and access it while it's in draft mode to make changes or schedule it to be sent. You may also want to create automated campaigns to be sent periodically. You'll also access all of your sent, scheduled and shared campaigns from this menu.
 - d. [Response](#) is where you can view the campaign response data. You may review which recipients took the actions shown.
 - e. [Automation](#) is where you can automatically send targeted emails to your audience based on actions that they're taking (like signing up or clicking links in your emails).
 - f. [Insights](#) is where you can track the performance of all of your sent mailings over time.
2. There is a [Marketing Calendar](#) on your Home page where you can quickly view dates for when mailings are scheduled to go out or have been sent out.
 - a. Hover over the blue dots to show the time, mailing name and click the link to review responses.

Manage your Audience (Contacts)

All the contacts in your Emma account are collectively referred to as your audience. Putting the contacts of your audience into groups helps to keep them organized and makes it a breeze to send customized content to them. You can create as many groups as you like, and each of your contacts can be in multiple groups, just one, or none. You can also set up segments to further target your audience based on particular criteria.

1. Select the links below to learn more about each topic.
 - a. [How to add, edit, archive, delete, and restore contacts](#)
 - b. [How to import new contacts from a file](#)
 - c. [How to format contact data for import](#)
 - d. [Making the most of your audience groups](#)
 - e. [Create a segment to target specific audience criteria](#)
 - f. [Emma Personalization Tags \(AKA Merge Tags\)](#)

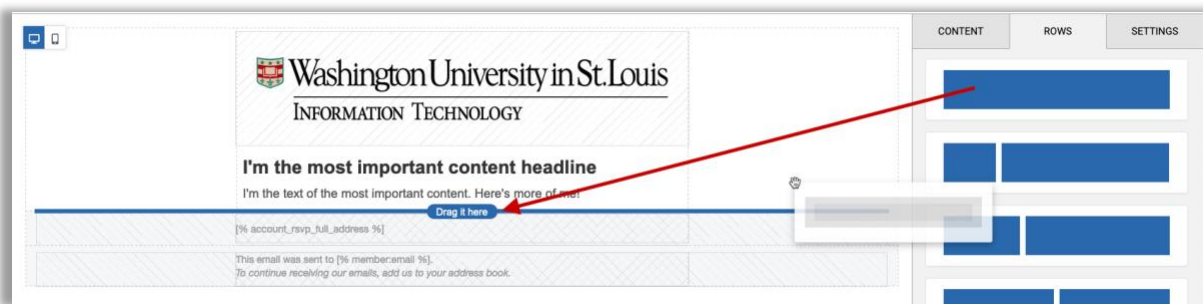
Create a New Campaign

1. Select the **Create New Campaign** button, from the Campaign tab or anywhere the button appears, to begin a new campaign.
2. Select **Regular Email** and give it a **Campaign Name** then select **Continue**.
3. Choose a [template from a gallery](#) or select **start from scratch**.
4. Create and format the campaign content using the right-side [drag and drop editor](#).

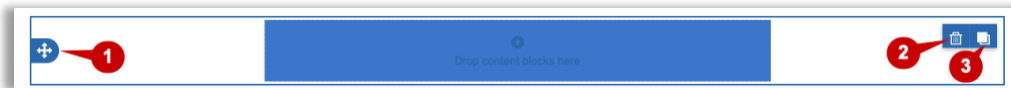
- a. Select the [Settings tab](#) to change the settings of your campaign.

The screenshot shows the 'SETTINGS' tab in the campaign editor. It contains a 'GENERAL OPTIONS' section with the following settings: 'Content area width' is set to 665px with a slider; 'Content area alignment' has 'LEFT' and 'CENTER' buttons, with 'CENTER' selected; 'Background color' is set to #ffffff; 'Content area background color' is set to 'transpar...'; 'Default font' is set to 'Arial'; and 'Link color' is set to #000000.

- b. Select the [Rows tab](#) from the editor panel and then choose a row with the desired number of columns and drag it to the location in your content.

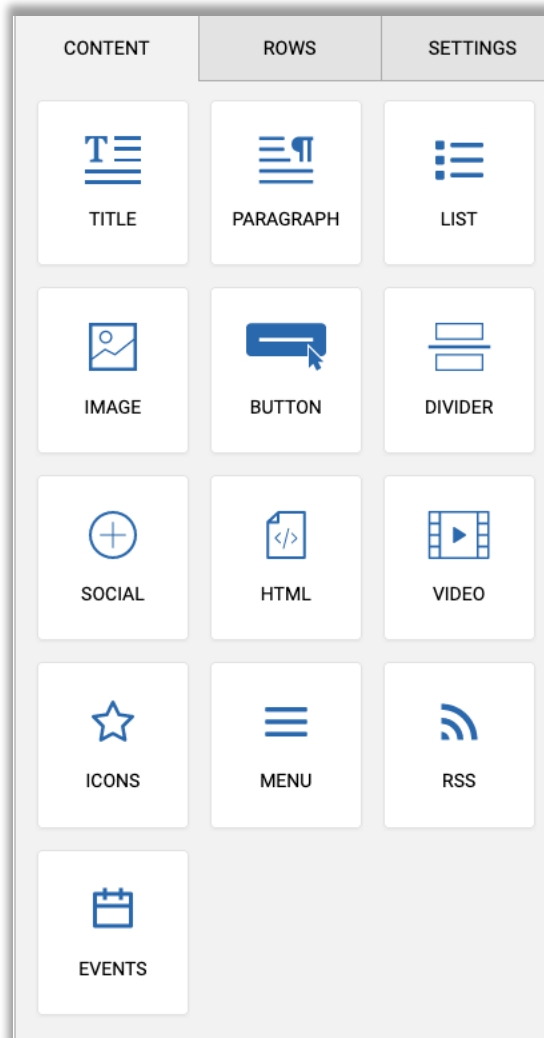


- c. Once the row is in position, you can:
1. drag to move it
 2. delete it
 3. copy it



- d. Use the Drag and Drop editor to add content to your rows. Simply select the desired item from the [Content tab](#) in the editor panel and drag it to the desired

location in the row.

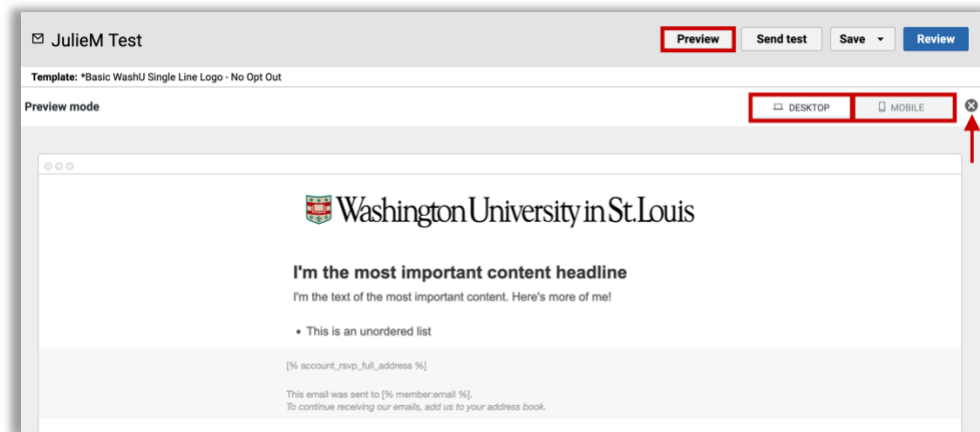


- e. Format or modify the content by selecting the element, in the template, and then applying the content properties change(s) from the editor panel.



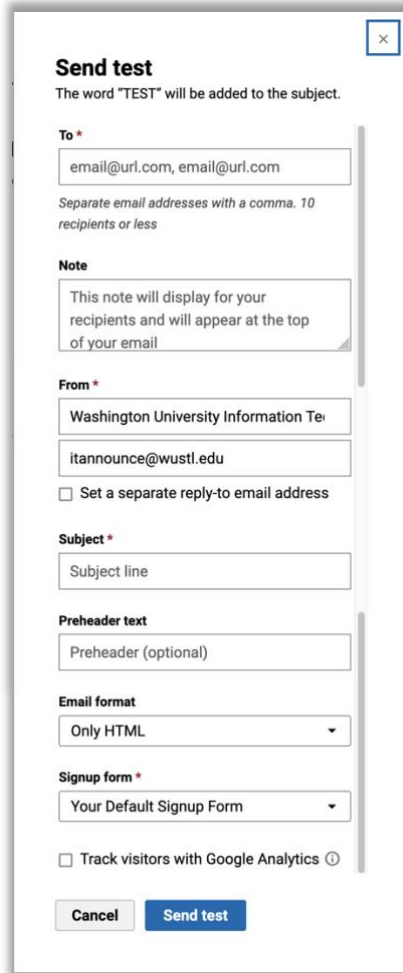
- f. Select the links below to learn more about the following topics:
- i. [How the Drag and Drop editor works](#)
 - ii. [Drag and drop editor resource hub](#)
 - iii. [The settings tab in the drag and drop editor](#)
 - iv. [Quick how-to videos on using the drag and drop editor](#)

- g. Continue to format your campaign by adding images, links, formatting the text and rows, etc. See the articles below for information on each topic:
- i. [Emma image specs and tips](#)
 - ii. [How to feature a PDF in your mailing](#)
 - iii. [How to create hyperlinks](#) (Scroll about half-way down the page to see **How to add hyperlinks to buttons and images.**)
 - iv. [How to use the video block](#)
 - v. [How to use the menu block](#)
 - vi. [How to use the icons block](#)
 - vii. [How to use the image block and its image editor](#)
 - viii. [How to use the image library](#)
 - ix. [How to use the RSS block](#)
 - x. [How to use the Event block to connect to Eventbrite](#)
 - xi. [How to create an add to calendar link](#)
5. Preview your campaign email.
- a. Select the preview button.
 - b. Toggle between Desktop and Mobile view to review the layout in either format.
 - c. Click the 'X' icon next to 'Mobile' to exit the preview.



6. Send a Test.
- a. After formatting and previewing your campaign, send yourself, and team if applicable, a test by selecting the **Send test** button.
 - b. Complete the form:
 - i. Add the reviewers' email address. If more than one, use a comma to separate them.
 - ii. Add an optional note to the reviewers.
 - iii. Enter or double-check that the sender's name and email address is correct.
 - iv. If your reply-to address needs to be different than the sender email address, check the box next to **Set a separate reply-to email address** and enter the address. [How to change your 'from' sender details.](#)

- v. Be sure to enter the subject line.
- c. Select **Send Test** when ready.

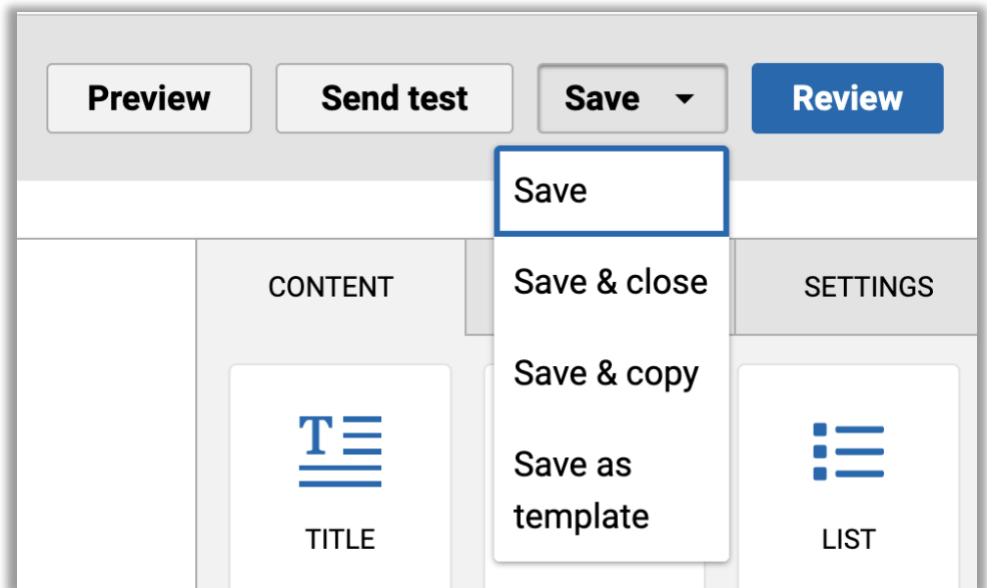


The screenshot shows a 'Send test' dialog box with a close button (X) in the top right corner. The dialog contains the following fields and options:

- To ***: A text input field containing 'email@url.com, email@url.com'. Below it, a note says 'Separate email addresses with a comma. 10 recipients or less'.
- Note**: A text area containing 'This note will display for your recipients and will appear at the top of your email'.
- From ***: Two text input fields. The first contains 'Washington University Information Te' and the second contains 'itannounce@wustl.edu'. Below them is a checkbox labeled 'Set a separate reply-to email address' which is unchecked.
- Subject ***: A text input field containing 'Subject line'.
- Preheader text**: A text input field containing 'Preheader (optional)'.
- Email format**: A dropdown menu currently set to 'Only HTML'.
- Signup form ***: A dropdown menu currently set to 'Your Default Signup Form'.
- At the bottom, there is an unchecked checkbox labeled 'Track visitors with Google Analytics' with a help icon.
- At the very bottom are two buttons: 'Cancel' and 'Send test'.

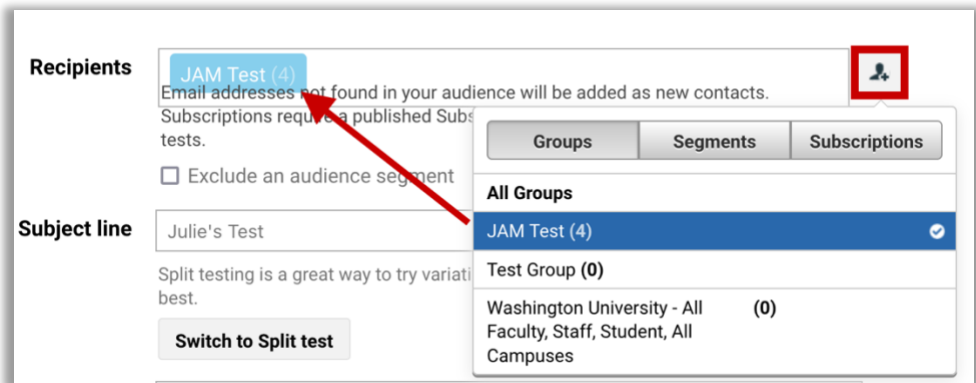
- 7. Saving while in draft mode.
 - a. Emma will auto-save your edits every 60 seconds, however, you can choose to save manually:
 - i. **Save.**
 - ii. **Save & Close** out of the editor.
 - iii. **Save & Copy**, then provide a name for the new version.
 - iv. **Save as Template**, then provide a name for the template.
 - 1. **Save as Template** is recommended if you plan to use the same layout again in the future, then you can select it as your template

(see step 3 above) and simply edit the parts that need updating.



8. Sending.

- a. When ready to send the campaign from editing mode, select **Review**.
- b. Next to the recipient's field, select the 'add recipients' icon, then select the audience. The Audience appears in the Recipients field.
 - i. Multiple groups, segments or subscriptions may be added.



- c. Verify that the rest of the settings are correct and then select **Send Now** or **Schedule for Later**.

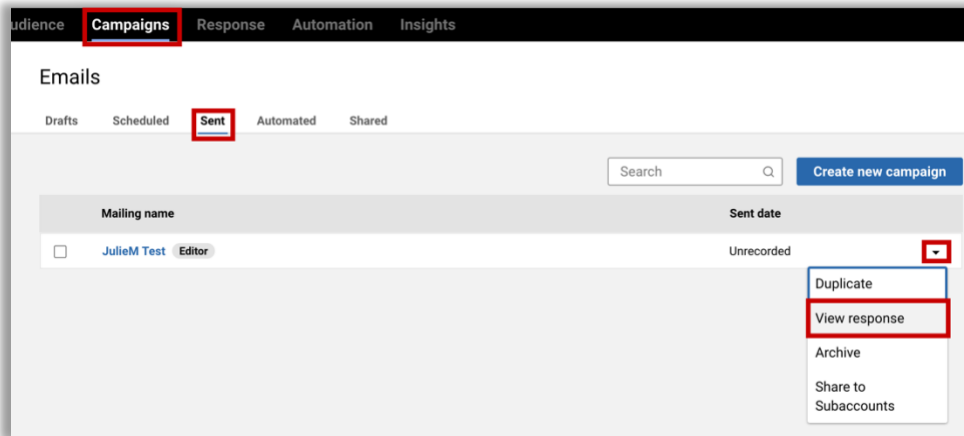
The screenshot shows the 'JulieM Test' email campaign configuration page. At the top, there's a header with the campaign name and a 'Save' button. Below this, the left sidebar contains a preview of the email content, including the Washington University in St. Louis logo and a headline. The main content area on the right is divided into several sections: 'Recipients' with a dropdown menu and a 'Switch to Split test' button; 'Subject line' with a text input field and a 'Switch to Split test' button; 'Preheader text' with a text input field and a character count of 75; 'Format' with a dropdown menu set to 'HTML (recommended)'; 'Signup form' with a dropdown menu set to 'Your Default Signup Form'; 'Google Analytics' with an 'Add Google Analytics' button; 'Sender name' with a text input field set to 'Washington University Information Technology'; 'Sender email' with a text input field set to 'itannounce@wustl.edu'; and a 'Send now' button highlighted with a red box, followed by 'or Schedule for later'.

- i. **Note:** Preheader text is a brief description of what's in your email. It's not displayed in the email itself, but appears in the email preview of most inboxes, following the subject line.
- ii. If you select **Schedule for later**, select the date and time you would like the campaign to send and include email addresses for notification when it sends, then select **Schedule it!**

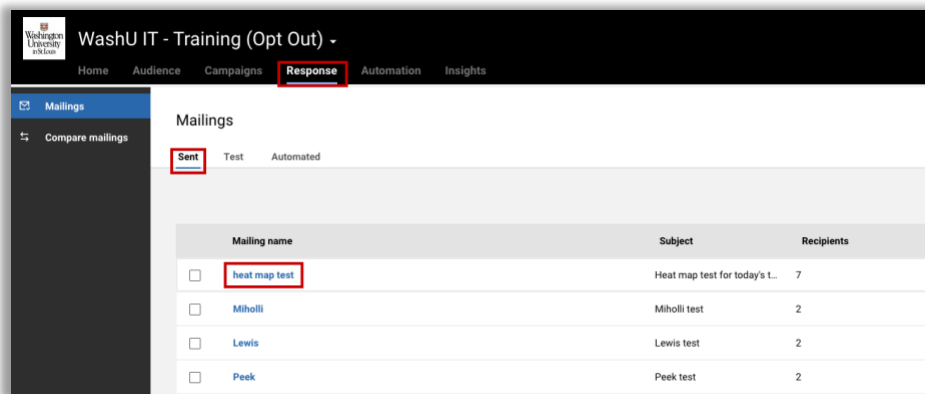
The screenshot shows a scheduling dialog titled 'When would you like this to start?'. It contains four input fields: 'What day?' with a date picker set to '11/27/2023', 'Hour' with a dropdown menu set to '3', 'Minute' with a dropdown menu set to '30', and 'am/pm' with a dropdown menu set to 'pm'. Below these fields is a section titled 'Notify these email addresses when it starts:' with a text input field. At the bottom, there is a 'NOTE: Time is in US/Central' and a 'Schedule it!' button highlighted with a blue box, followed by 'or Cancel'.

Review the Responses

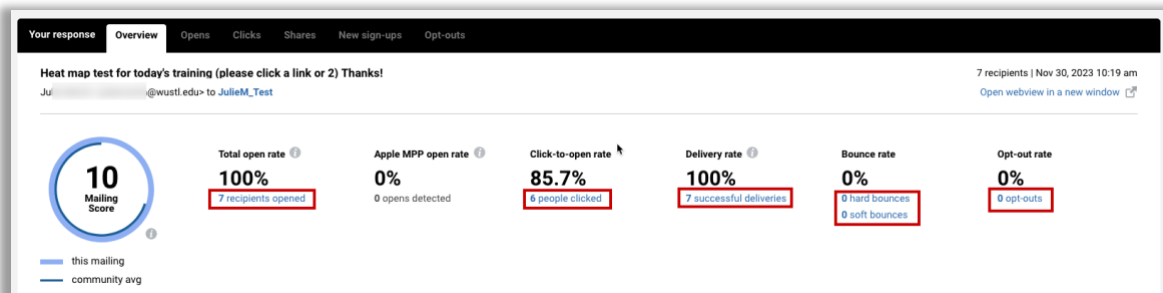
1. After sending the campaign you may access the results in the [Response page](#). Access the Response page one of two ways:
 - a. From the **Campaigns** page select the **Sent** tab, locate the campaign in the window. Then click the down-arrow at the end of the row and select **View response**.



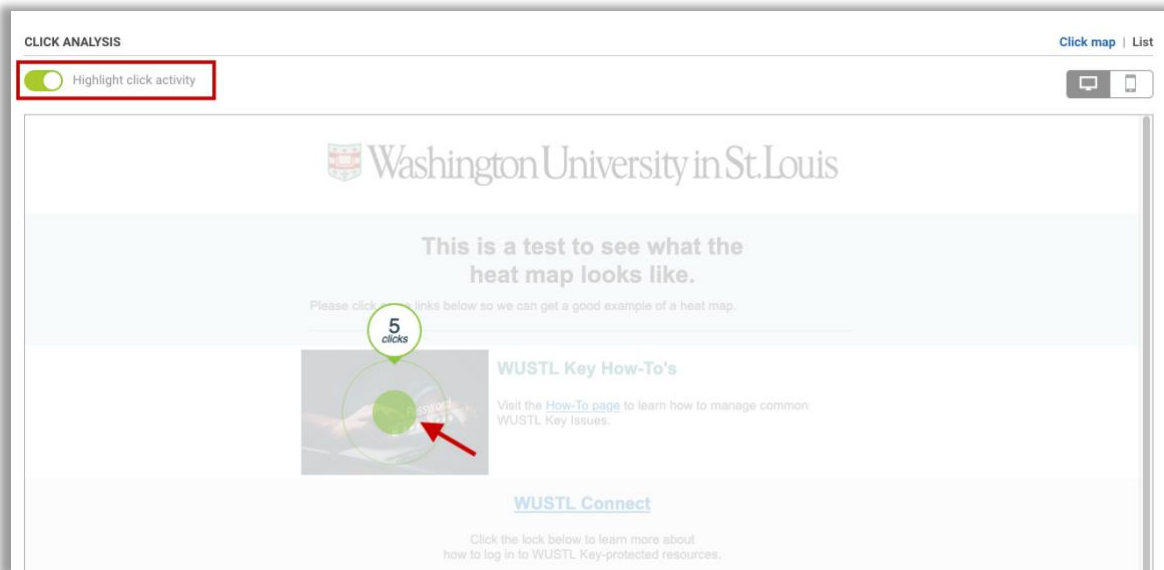
- b. Or go directly to the **Response** page and locate the sent campaign under the **Sent** tab. Then just select the **Mailing name**.



- c. The page will open to the Overview tab.
2. Select the links below the percentages to dive down into the data results.



3. View the click analysis map in the window below. Hover over the green areas to learn more about the clicked area. Toggle between the click map and regular view of the campaign with the Highlight click activity toggle switch.



4. Export the results using the buttons in the upper right.



5. Share the campaign via a direct URL. Select the **Open webview in a new window** link and then copy the URL from the new window.



- a. Learn more about what options are available on the [Response page](#) and [Looking at the data on the response tab](#).

Additional Resources

[What you can edit in the footer of your campaign](#)

[Setting up your Subscriptions Center](#)

[How to create and edit a signup form](#)

[How to create a content A/B split test](#)

[Glossary of email marketing terms](#)

[10-Point Pre-Send Campaign Checklist](#)

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