



CONCEP SEND

# How To Send An Email Campaign

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**Jenny Dean**

Client Support Executive  
Concep Global

Phone: +44 (0)20 7952 5598

Email: [jenny.dean@concep.com](mailto:jenny.dean@concep.com)

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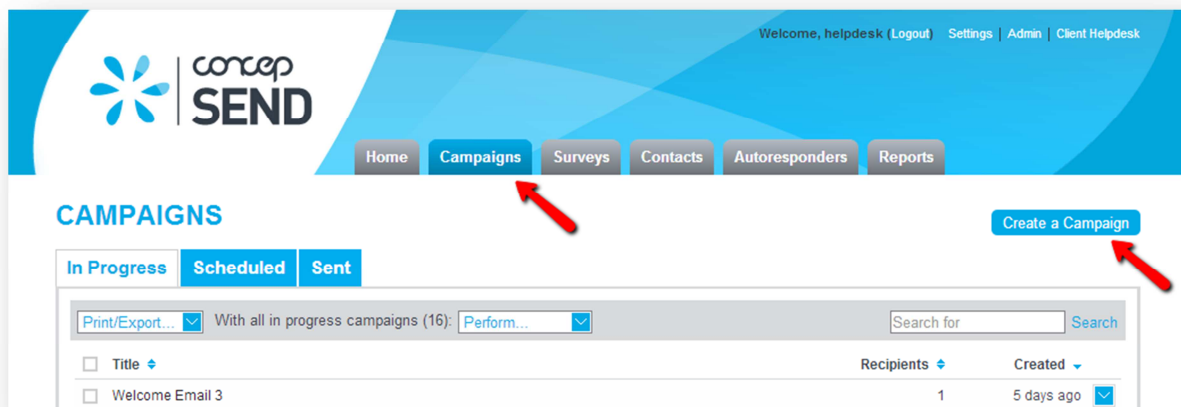
## 1. CREATING A CAMPAIGN

Creating your campaign:

- Create a new campaign using a template
- Profile
- From line
- Subject line
- Mail merge
- Edit content
- Insert image
- Import a link e.g. webpage
- Print friendly
- Add a page

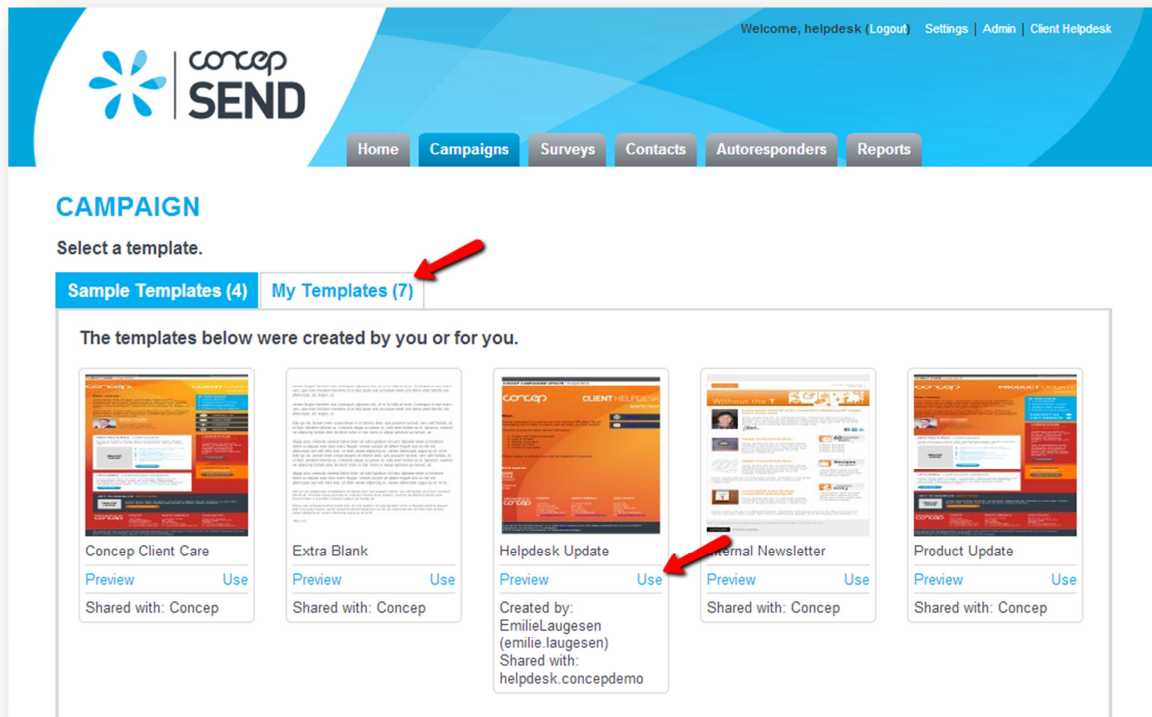
### 1.1 Create a new campaign using a template

Select the 'Campaigns' tab and click on 'Create a Campaign'.



Then select a template. Click 'Use' located on the template of your choice.

You will then be asked to name your campaign. Provide a campaign title and click Create. This is an internal reference for the campaign.



You will now be in the main Content section, where you can start editing your campaign.

### Profile

Select; this is the name you want to show the communication is coming from. You can add a profile by clicking Manage Profiles.

### From line

Select your sending domain; this is the email address that is displayed, showing the recipient which email address the campaign was sent from.

### Subject line

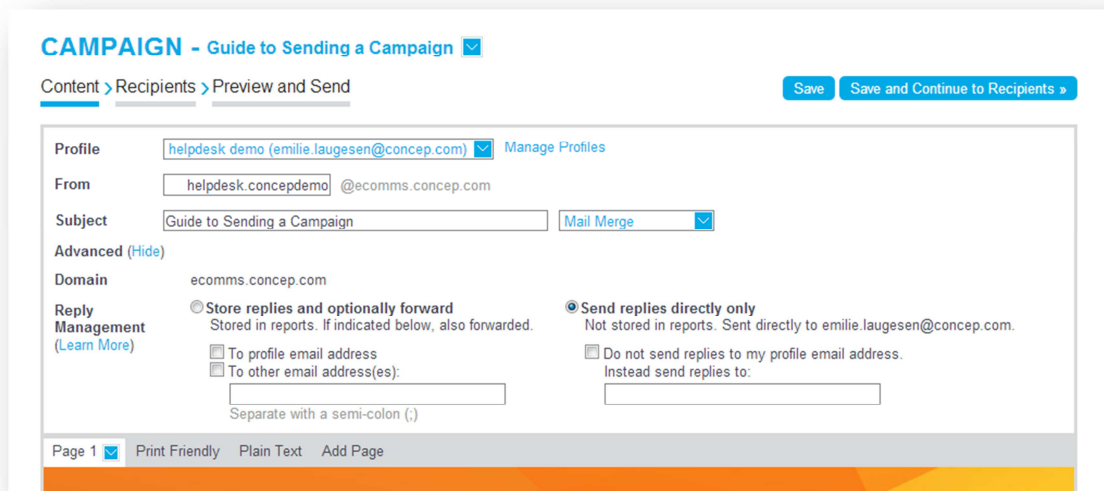
Enter a subject line for your campaign; the subject for your email message.

### Mail merge

You can select the mail merge drop down to pull specific information from your contacts list data. For example, if you wish to personalize your communication to the individual by directing it to the recipient, you can do so i.e. For 'Welcome Jack' you would select the mail merge [First\_name] so the subject field reads: 'Welcome [First\_name]'.

### Replies

Click on the blue 'Show' link next to Advanced to view the Advanced section. This is where you set where reply emails go to. You can send it to a single email or multiple email addresses by selecting the bottom box and entering in the emails. You may also set replies to go to the Profile email as well.



## 1.2 Content

You can edit the content inside any of the red-dotted lines. This shows you what you can and can't edit on the template. For example, you can edit text manually or edit content in tables.

When clicking in one of the editable boxes, the toolbar will appear.

### Undo and Redo

Useful for small amends, we do advise saving frequently as you go.

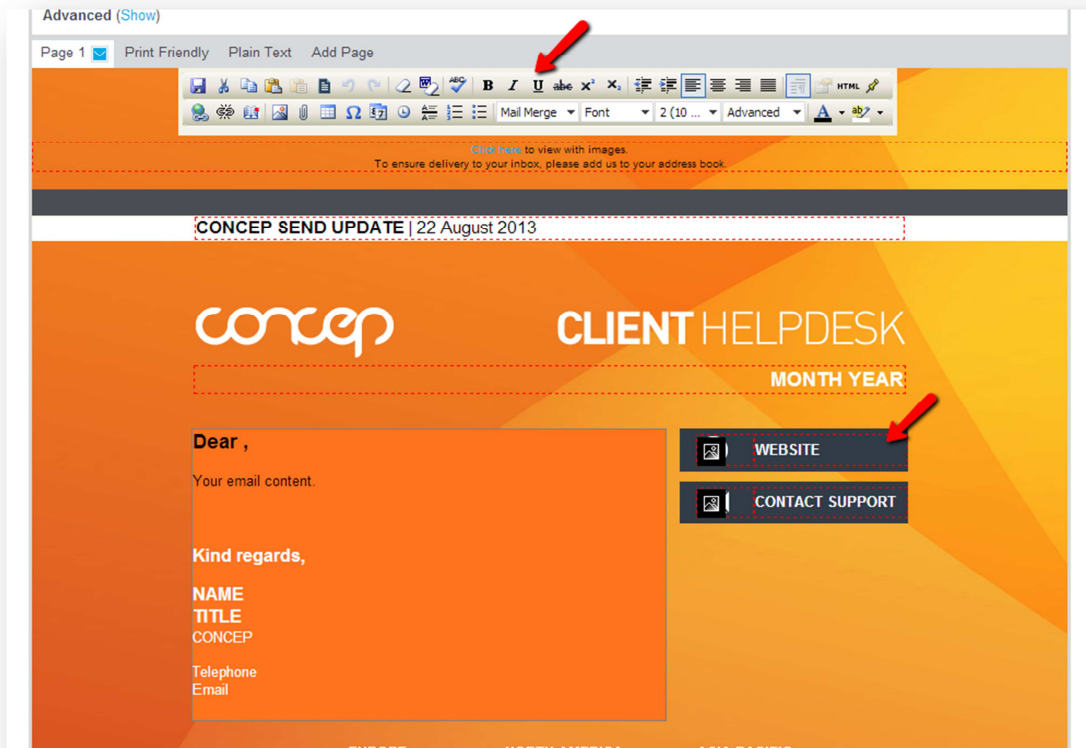
### HTML

If you have HTML skills, you may click on this icon to edit the HTML.

### Create links

For example, another page in the campaign, a survey or social network site.

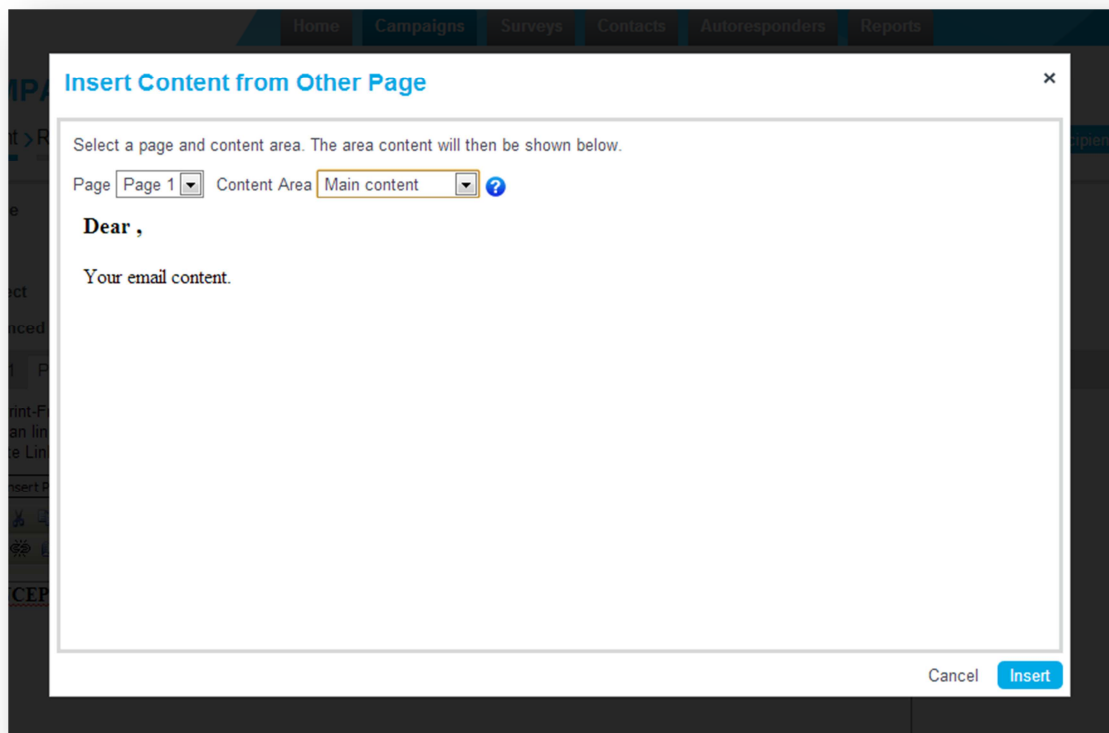
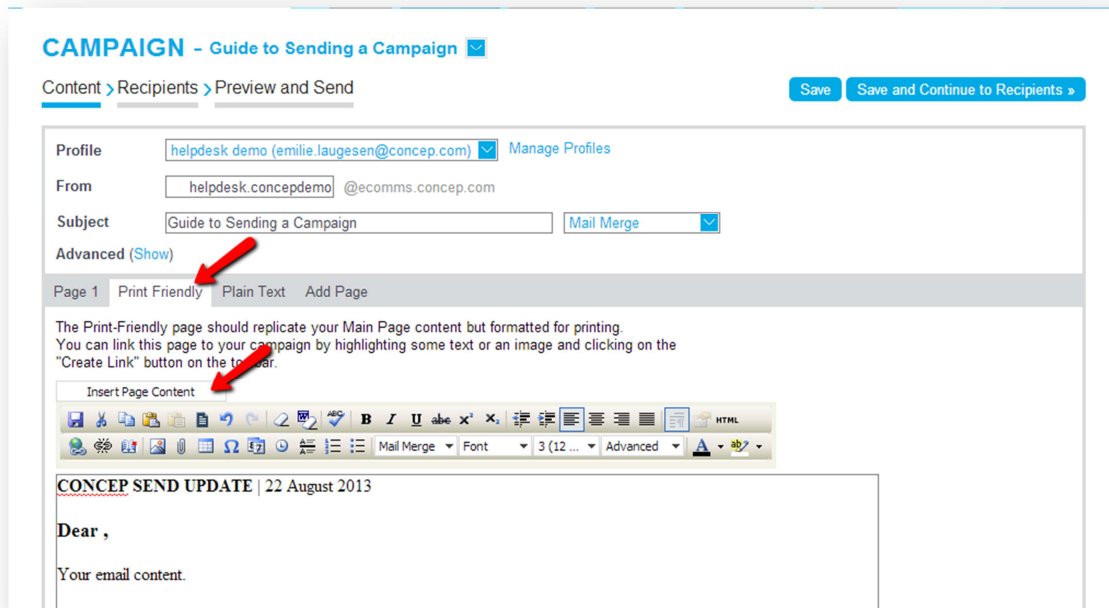
### Importing an image



### 1.3 Print friendly

Creating a print friendly version is discretionary. Many clients create a print and mobile friendly version for those recipients who receive a campaign on a handheld device.

Click on the Print Friendly tab and select the content areas you wish to display on the print friendly version of the campaign by selecting the **'Insert Page Content'** dropdown.

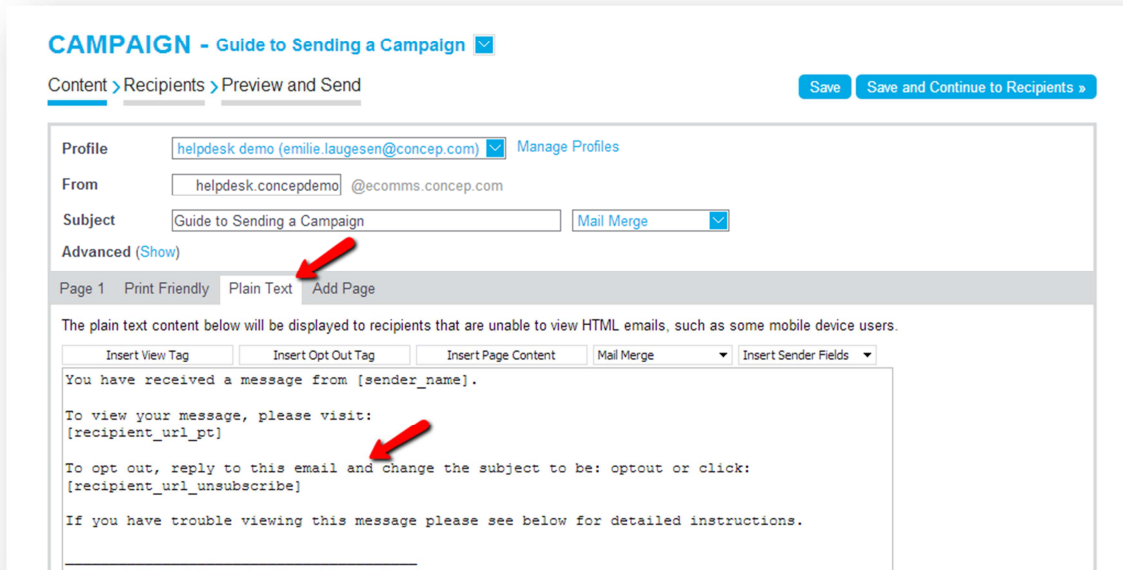


### 1.4 Plain text

This is set up as default; this same message runs across all your campaigns. This will be sent to recipients if they are set to plain text, as you know they are on a Blackberry device or the device cannot accept the HTML.

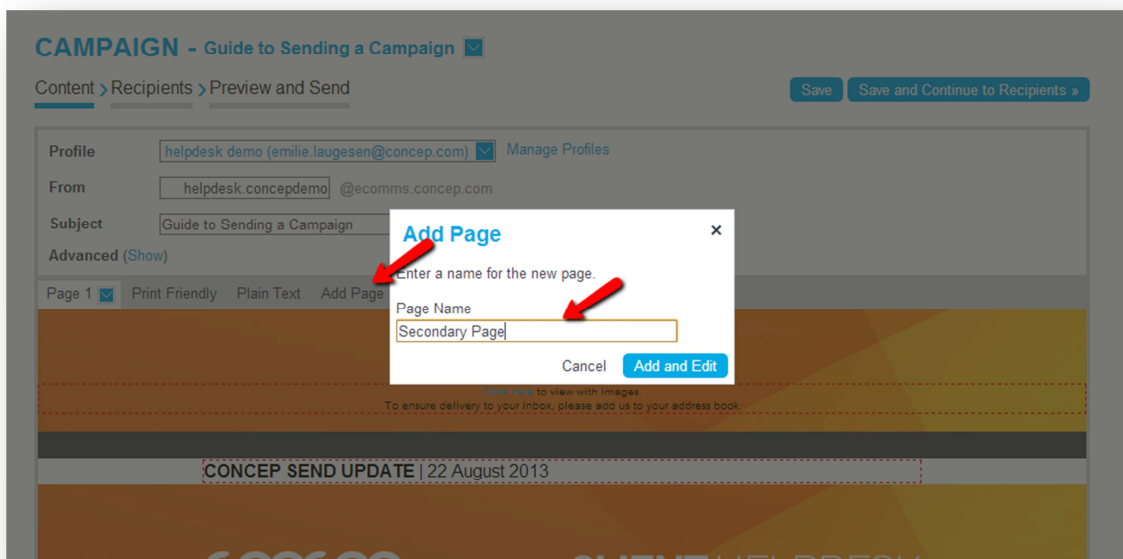
The URL is created and is sent automatically.

We always advise that some basic content be entered in order to engage the recipient. This can be set up for one User account or across a full set of Client accounts, so whenever you create a new campaign you don't have to edit it each time.



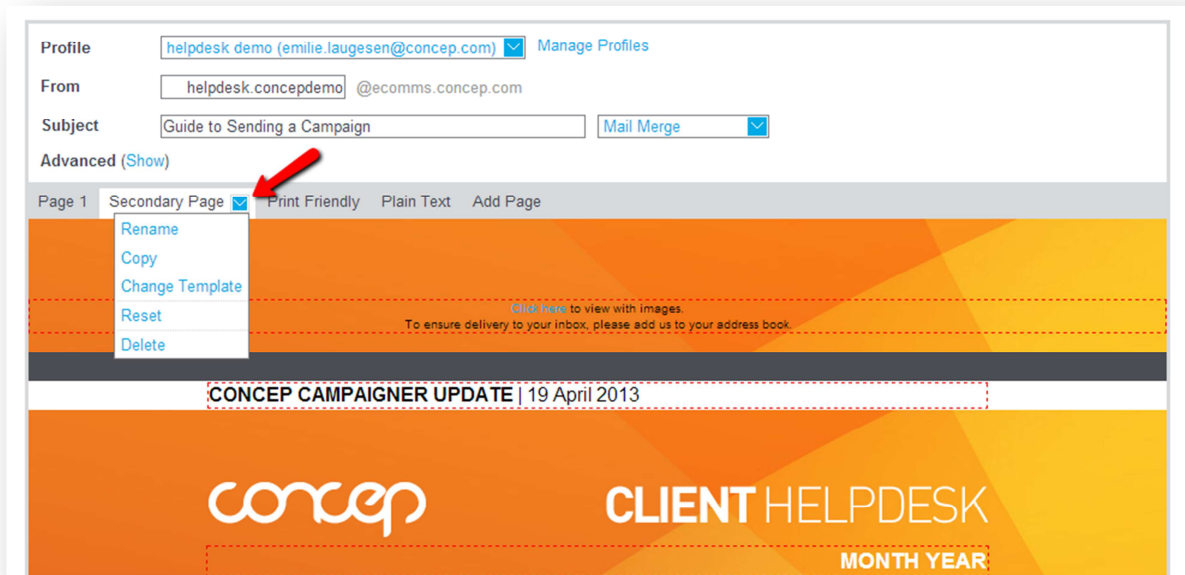
## 1.5 Adding a page

Select the 'Add Page' tab and enter a page name.





On the new page just created, you can select the dropdown for more actions. The new page will automatically use the template you have selected for the first page, however you can change this by selecting **'change Template'**.

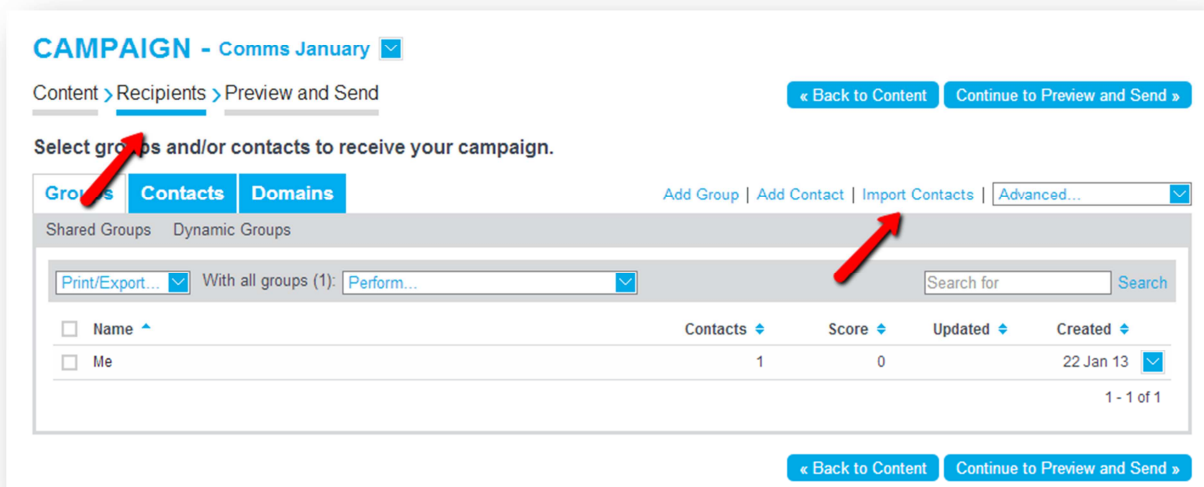


Once your campaign is saved and ready to be sent, progress to the **'Recipients'** page.

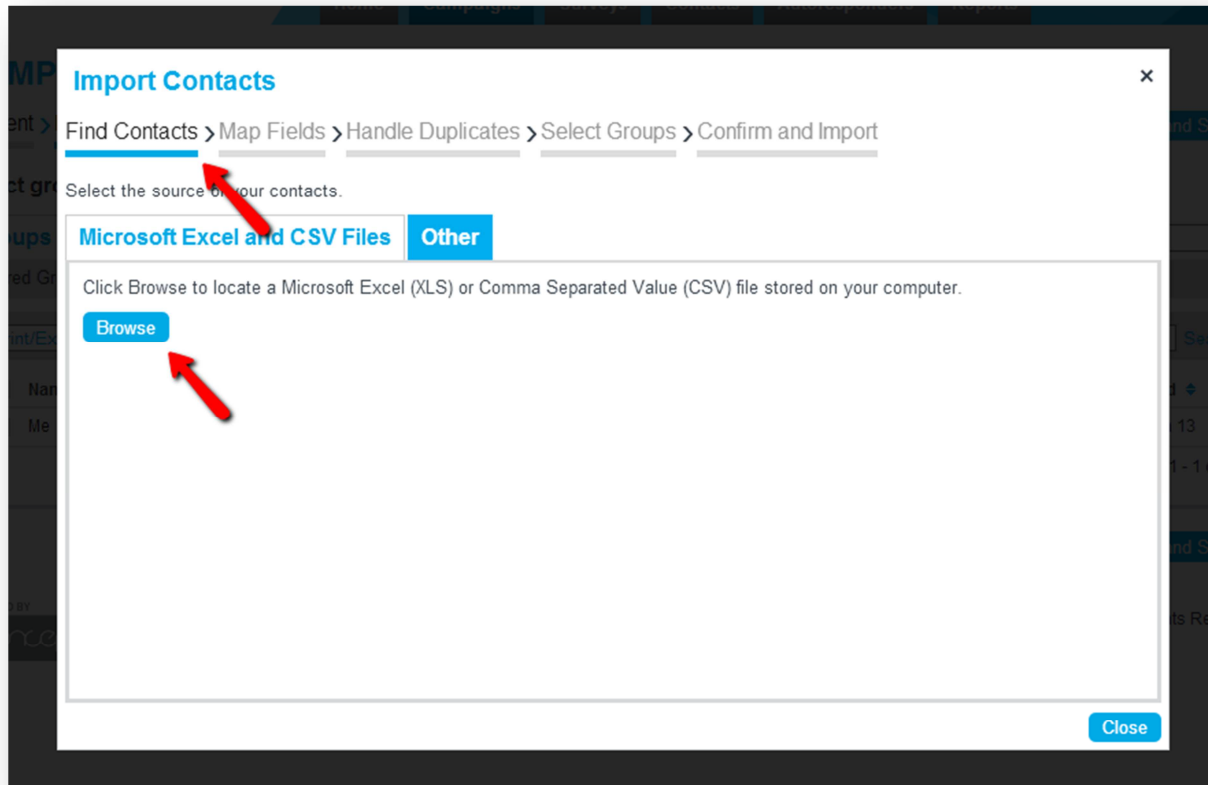
## 2. IMPORTING CONTACTS

You can either import contacts at the **'Recipients'** stage when creating a campaign or in the **'Contacts'** tab.

When importing on the **'Recipients'** page, select **'Import Contacts'**.

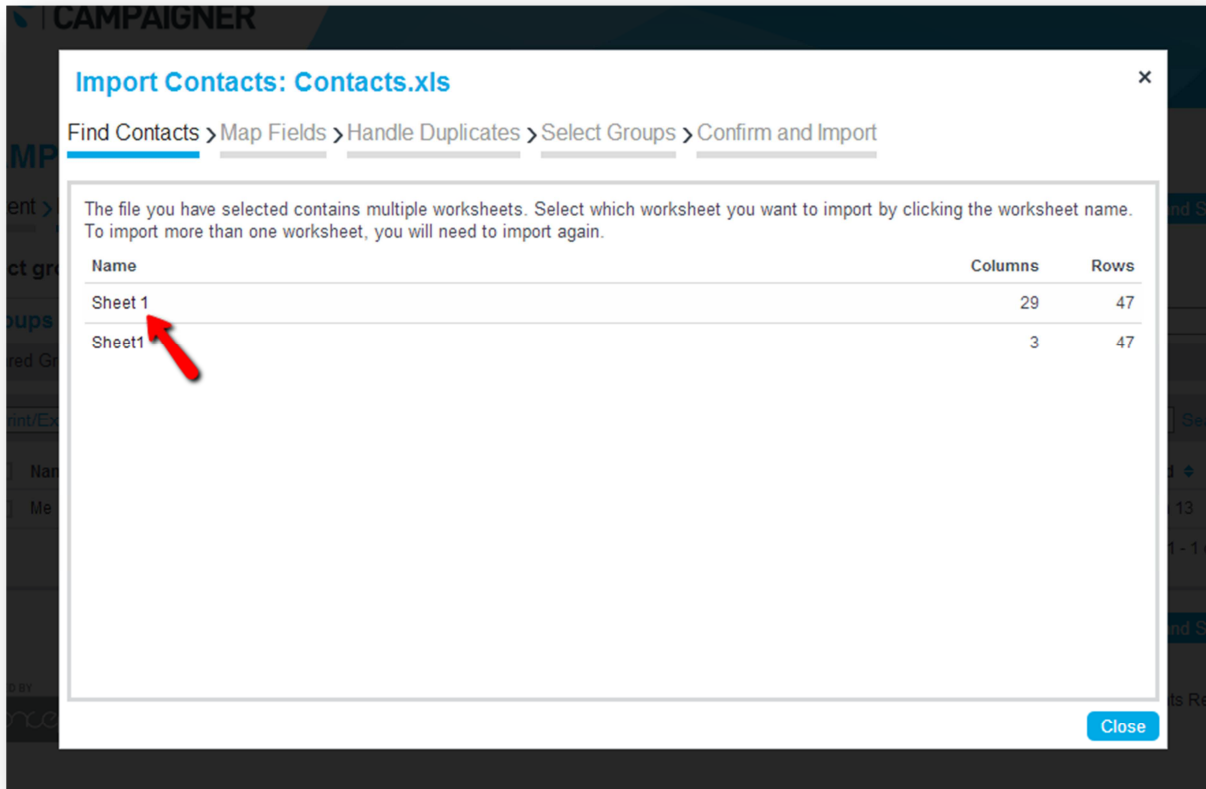


The importing steps will appear in a popup screen.

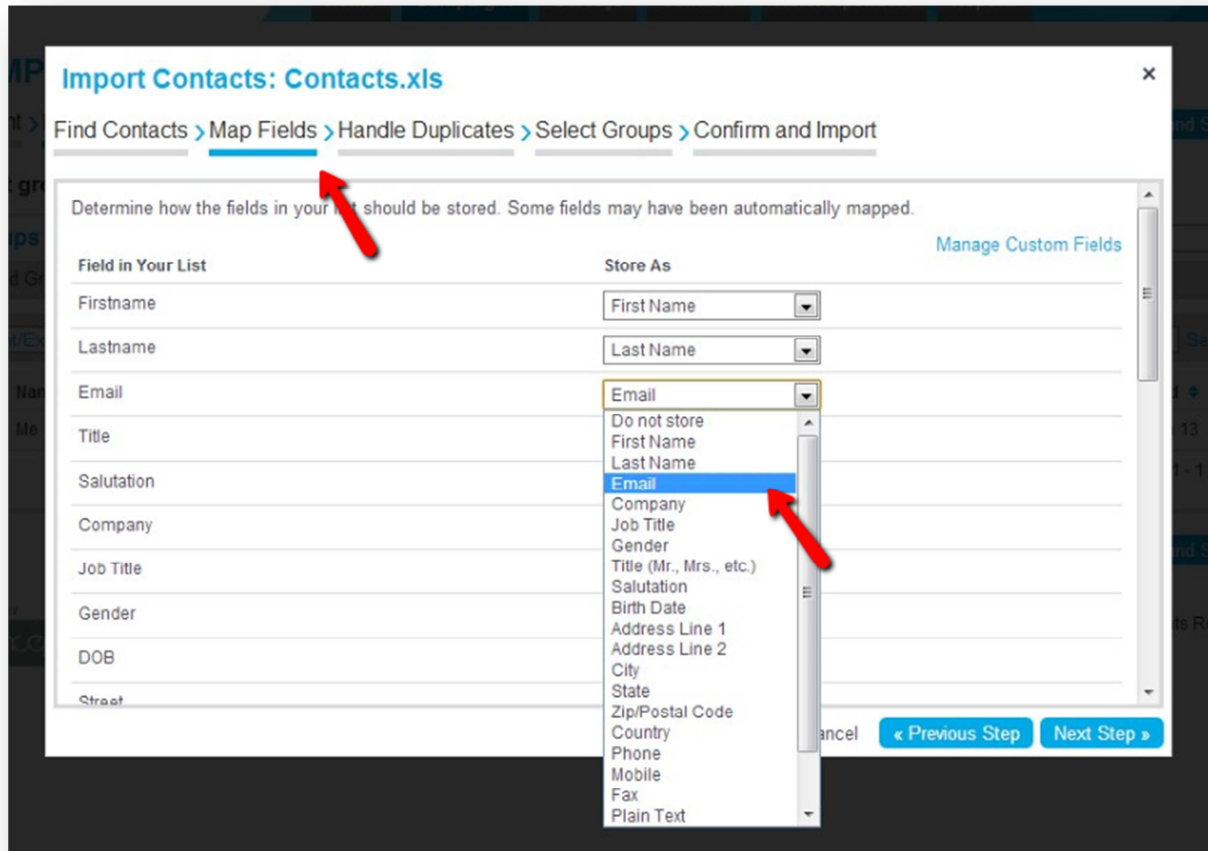


The first stage is '**Find Contacts**' – Select the relevant tab to upload via Microsoft Excel or CSV file, or import contacts via an email account. The most common way to upload is click with the list of contacts in a Microsoft Excel or CSV file. All contacts must have an email address.

Click the '**Browse**' button and select the relevant spreadsheet from your computer. If the spreadsheet has more than one sheet, select the relevant sheet you wish to upload.



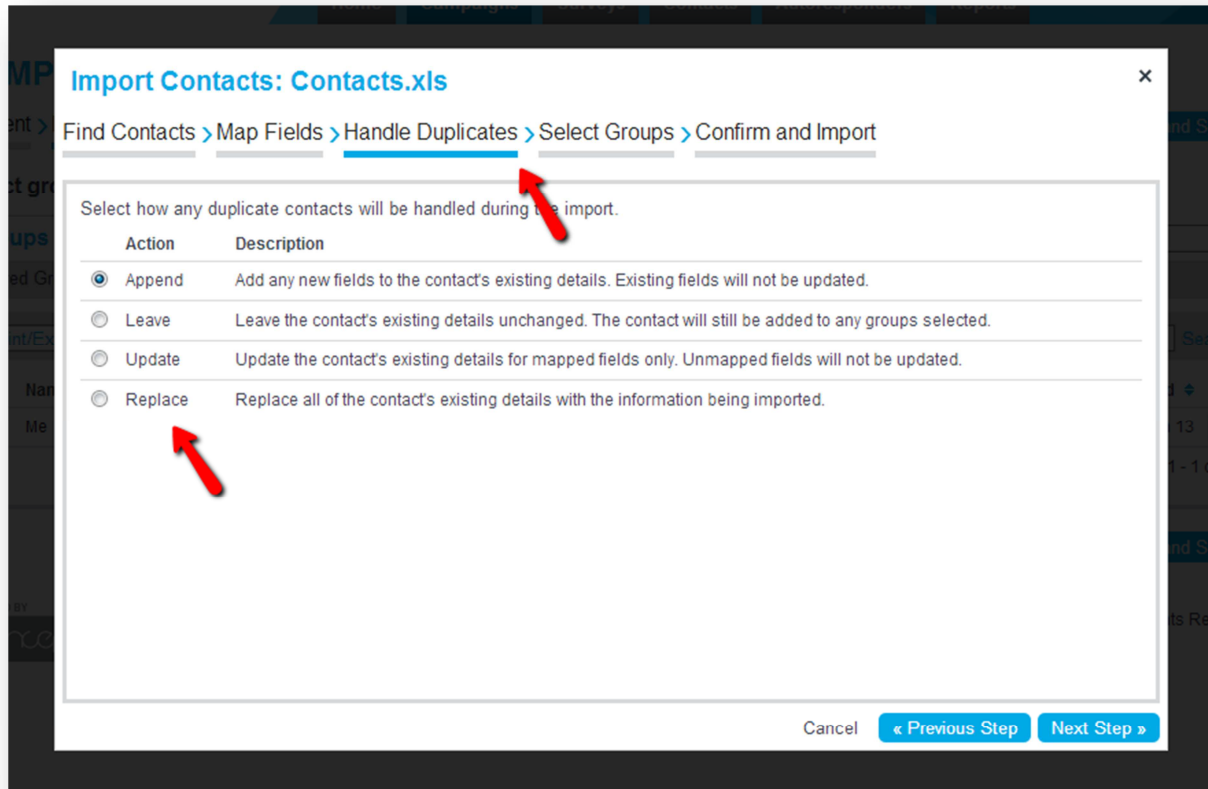
Once the spreadsheet is imported, you will go to the **'Map Fields'** section of the import.



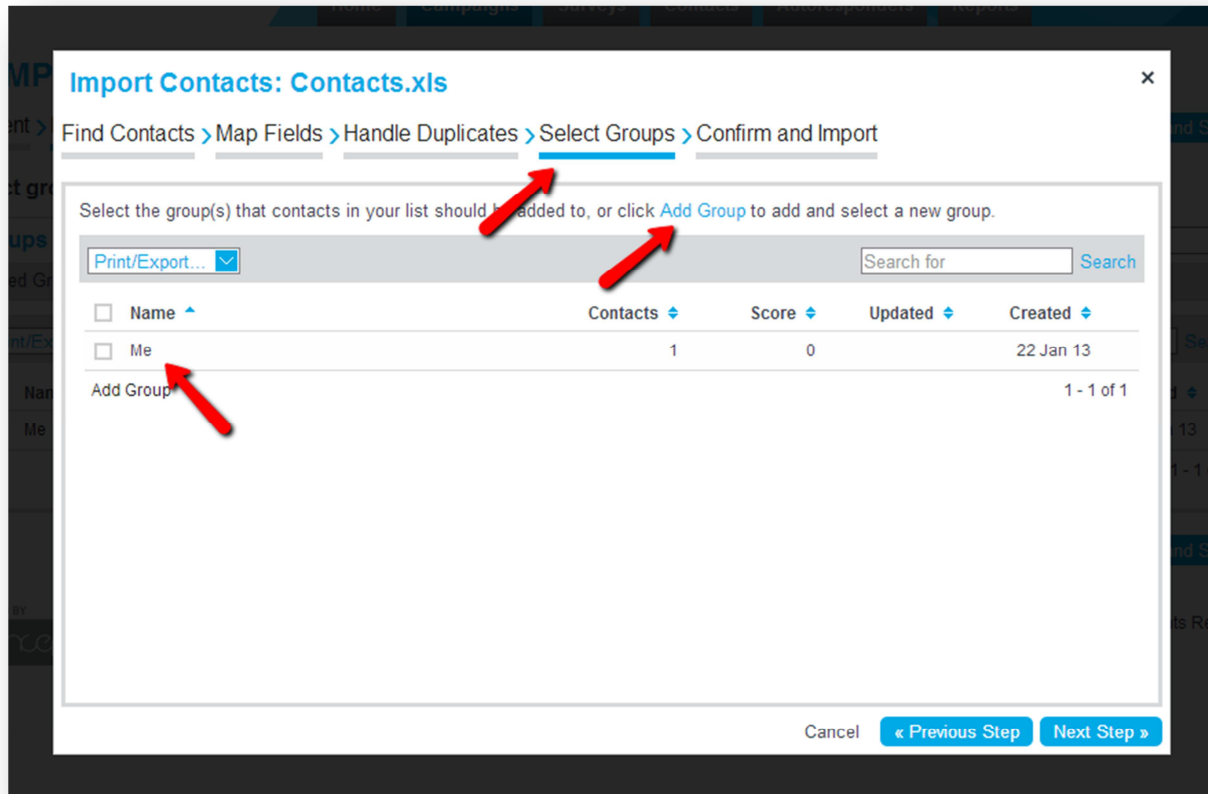
Here the left hand column contains the header fields in your uploaded contact spreadsheet.

In the right hand side column, use the drop down menus to select which fields you wish to store the header fields on the left. Once complete proceed using the **'Next Step'** button.

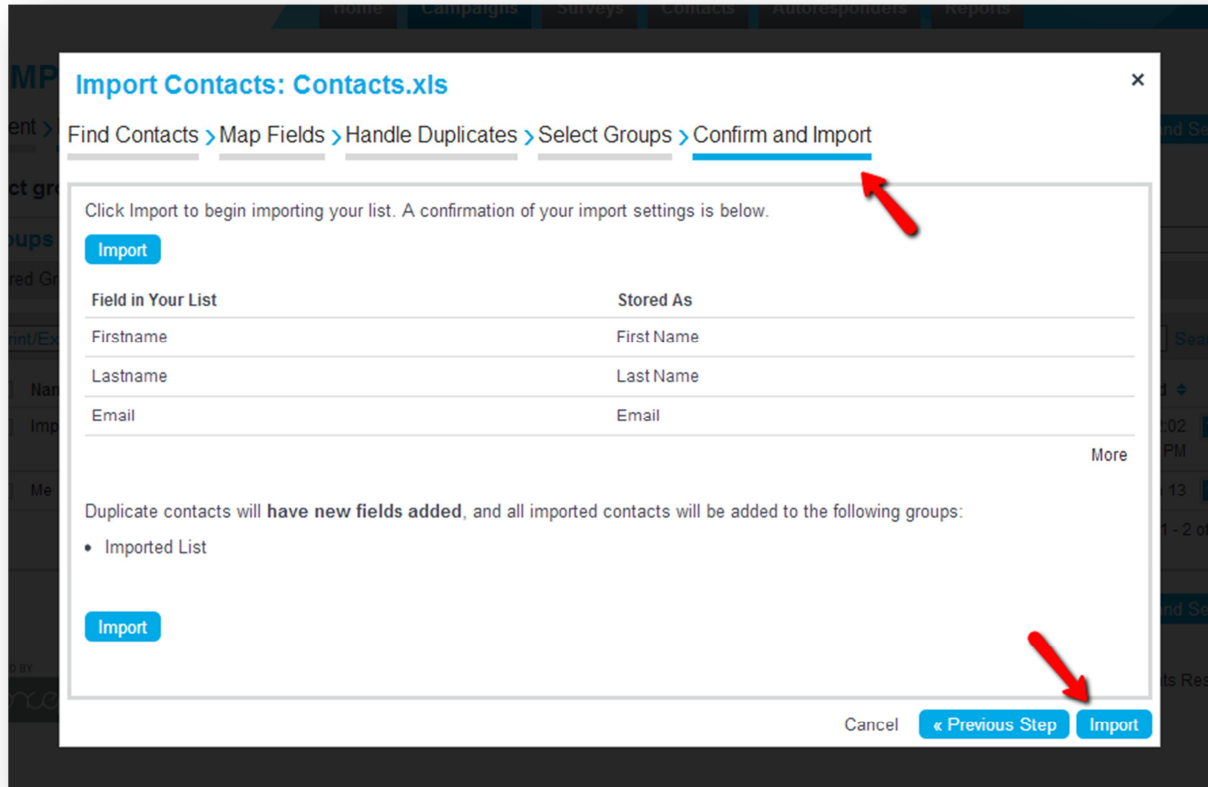
The **'Handle Duplicates'** stage gives you the option to review how you wish to deal with duplicate email addresses you may be importing. Review the different descriptions to see which action is most suited to you when uploading and select using the radio buttons.



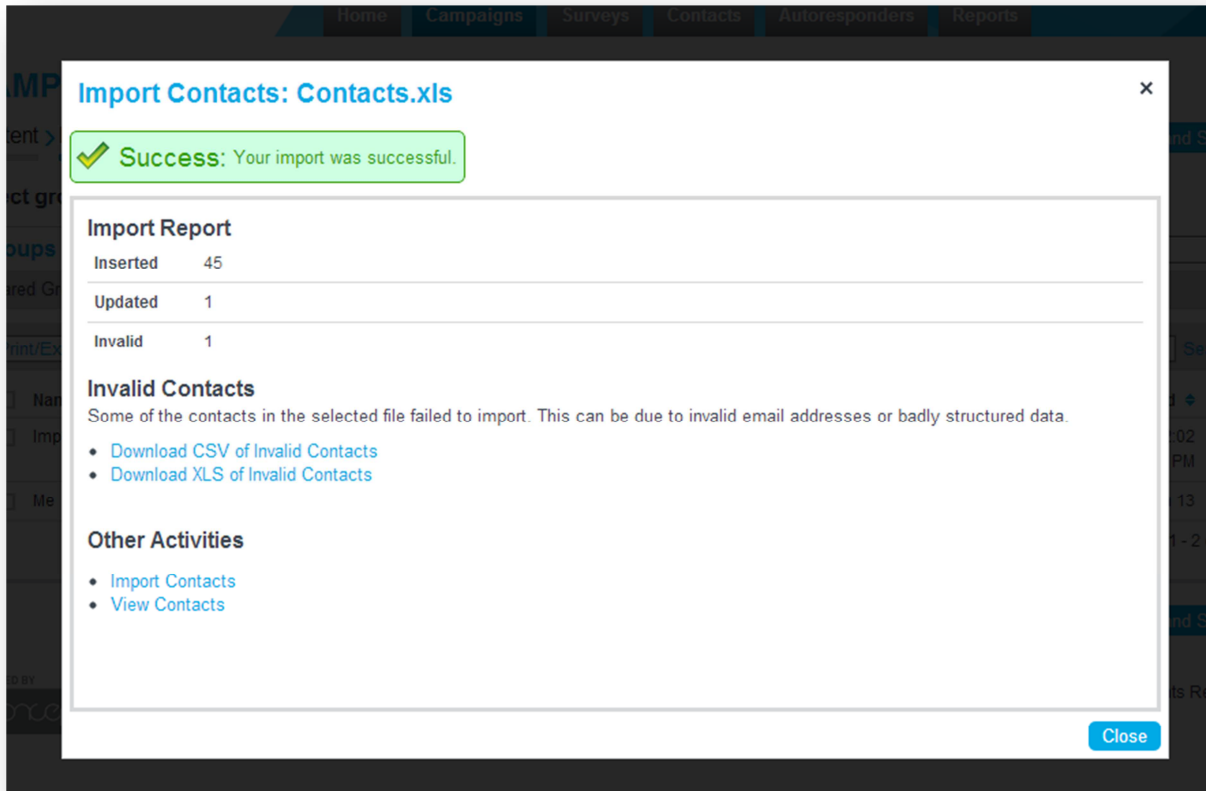
At the '**Select Groups**' stage it is then possible to add the list of contacts you are importing to a Group. There is the option to choose a current Group, create a new Group or not select one at all.



Once the relevant Group has been selected continue to the **'Confirm and Import'** stage. Check all the import settings and click **'Import'** to start importing.



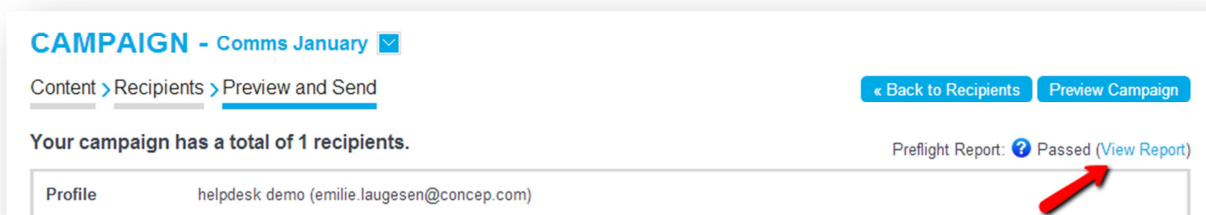
Once the importing is complete a confirmation screen will appear with details of the contacts inserted, updated and invalid.



### 3. PREVIEW AND SEND

#### 3.1 Preflight Report

Once you reach the 'Preview and Send' stage there is an option to run a Preflight Report.

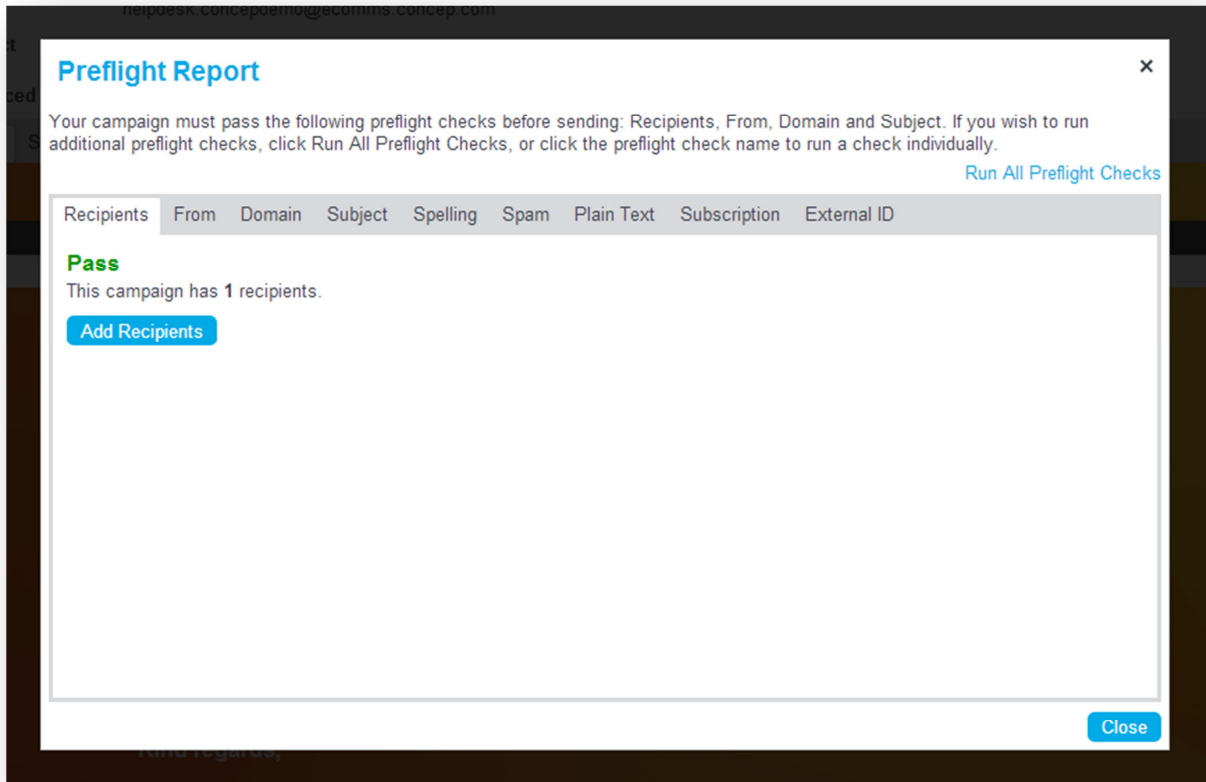


This report checks through features of your campaign such as:

- Recipients
- From line
- Domain
- Subject line
- Spelling
- Spam



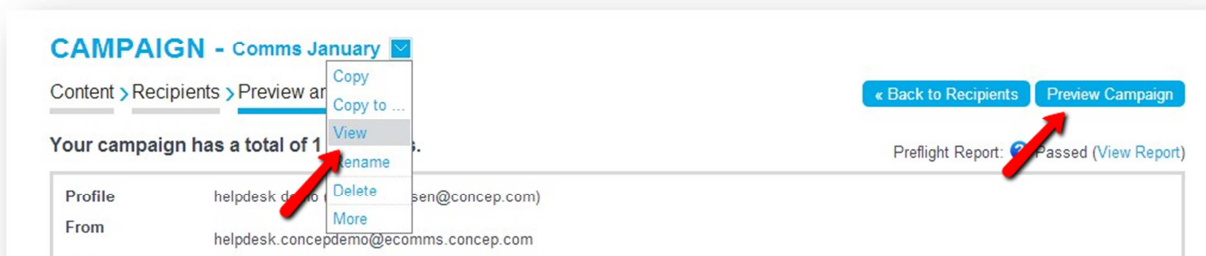
- Plain Text
- Subscription
- External ID



Use the tabs to check through all the Preflight Report features.

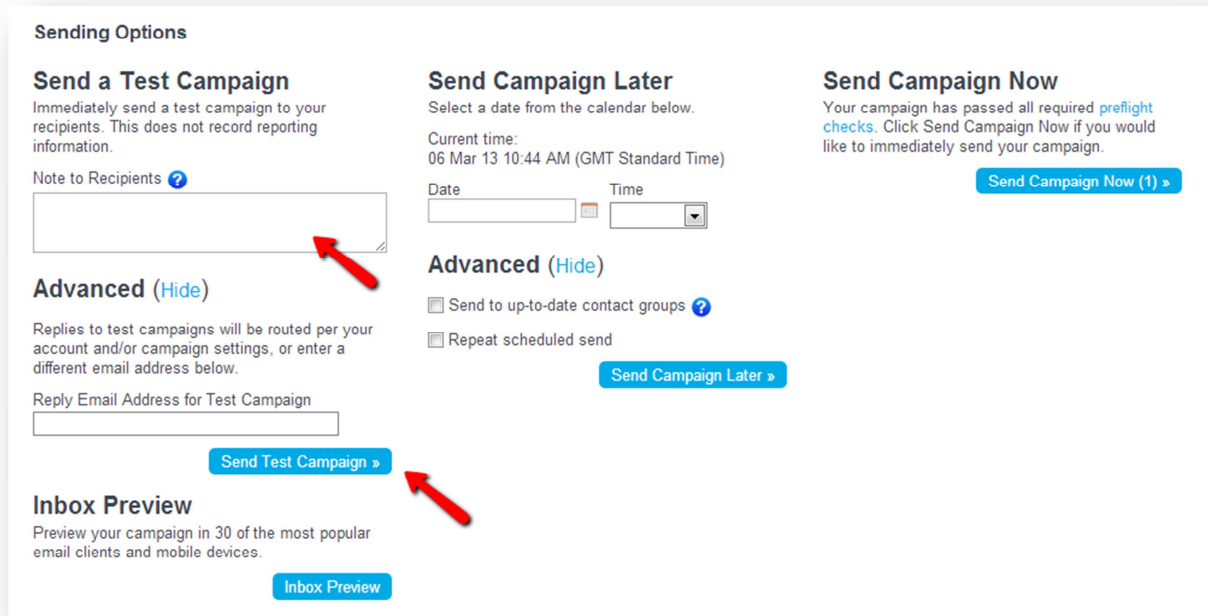
### 3.2 Preflight Campaign

You can preview your campaign by selecting the **'Preview Campaign'** button in the upper right hand corner or by selecting **'View'** from the drop down arrow next to the campaign's name (this can be done for any in progress, scheduled or sent campaign).



### 3.3 Send a Test

You can send a test campaign to up to five recipients using the **'Send Test Campaign'** button below the campaign preview.



You have the option add a note for test recipients (which will appear at the top of the campaign in a shaded box). You can also add a reply email address for the test campaign.

Once a test is sent, the campaign will remain in your **'In Progress'** section. No reporting data is recorded for tests.

You may send an unlimited number of tests. Please note that any changes made after you send a test campaign will cause links in the campaign to break. Be sure to send another test after you have made any changes to your campaign to ensure the recipients receive the correct version.

### 3.4 Inbox Preview

You can preview your campaign in over 30 of the most popular email clients and mobile devices by clicking on the **'Inbox Preview'** button under **'Sending Options'**.

### Sending Options

#### Send a Test Campaign

Immediately send a test campaign to your recipients. This does not record reporting information.

Note to Recipients [?](#)

#### Advanced (Hide)

Replies to test campaigns will be routed per your account and/or campaign settings, or enter a different email address below.

Reply Email Address for Test Campaign

[Send Test Campaign >](#)

#### Send Campaign Later

Select a date from the calendar below.

Current time: 06 Mar 13 10:44 AM (GMT Standard Time)

Date  Time

#### Advanced (Hide)

Send to up-to-date contact groups [?](#)

Repeat scheduled send

[Send Campaign Later >](#)


#### Send Campaign Now

Your campaign has passed all required [preflight checks](#). Click Send Campaign Now if you would like to immediately send your campaign.

[Send Campaign Now \(1\) >](#)

#### Inbox Preview

Preview your campaign in 30 of the most popular email clients and mobile devices.

[Inbox Preview](#) 

The fastest, most accurate selections based on your web browser and operating system will be automatically selected. Select (or deselect) desired previews and click the 'Run Preview' button.

### Campaign: Comms January x

Details
Social Media
Inbox Preview
Download
Sends
History

Preview how your campaign will display in some of the most popular email clients and mobile devices. The fastest, most accurate selections based on your web browser and operating system have been automatically selected below.

You will view results on the [Email on Acid](#) website. Click the Test Results tab to access previews.

**Desktop (Uncheck All)**

<input checked="" type="checkbox"/> Apple Mail 4	<input checked="" type="checkbox"/> Apple Mail 5	<input checked="" type="checkbox"/> Apple Mail 6	<input checked="" type="checkbox"/> Entourage 2004	<input checked="" type="checkbox"/> Entourage 2008	<input checked="" type="checkbox"/> Live Mail
<input checked="" type="checkbox"/> Lotus Notes 6.5	<input checked="" type="checkbox"/> Lotus Notes 7	<input checked="" type="checkbox"/> Lotus Notes 8	<input checked="" type="checkbox"/> Lotus Notes 8.5	<input checked="" type="checkbox"/> Outlook 2003	<input checked="" type="checkbox"/> Outlook 2007
<input checked="" type="checkbox"/> Outlook 2010	<input checked="" type="checkbox"/> Outlook 2013	<input checked="" type="checkbox"/> Outlook Express	<input checked="" type="checkbox"/> Thunderbird 13	<input checked="" type="checkbox"/> Windows Mail	

**Mobile (Uncheck All)**


<input checked="" type="checkbox"/> Android 2.3	<input checked="" type="checkbox"/> Android 4	<input checked="" type="checkbox"/> Android Gmail 2.2	<input checked="" type="checkbox"/> BlackBerry 8800	<input checked="" type="checkbox"/> BlackBerry 9930	<input checked="" type="checkbox"/> iPad 5.0
<input checked="" type="checkbox"/> iPad Gmail	<input checked="" type="checkbox"/> iPhone 4S (iOS 5)	<input checked="" type="checkbox"/> iPhone 4S (iOS 6)	<input checked="" type="checkbox"/> Kindle Fire 2.3		

**Web (Uncheck All)**

Code Based Previews (Fastest Results)    Cross-Browser Screen Captures (Most Accurate Results)

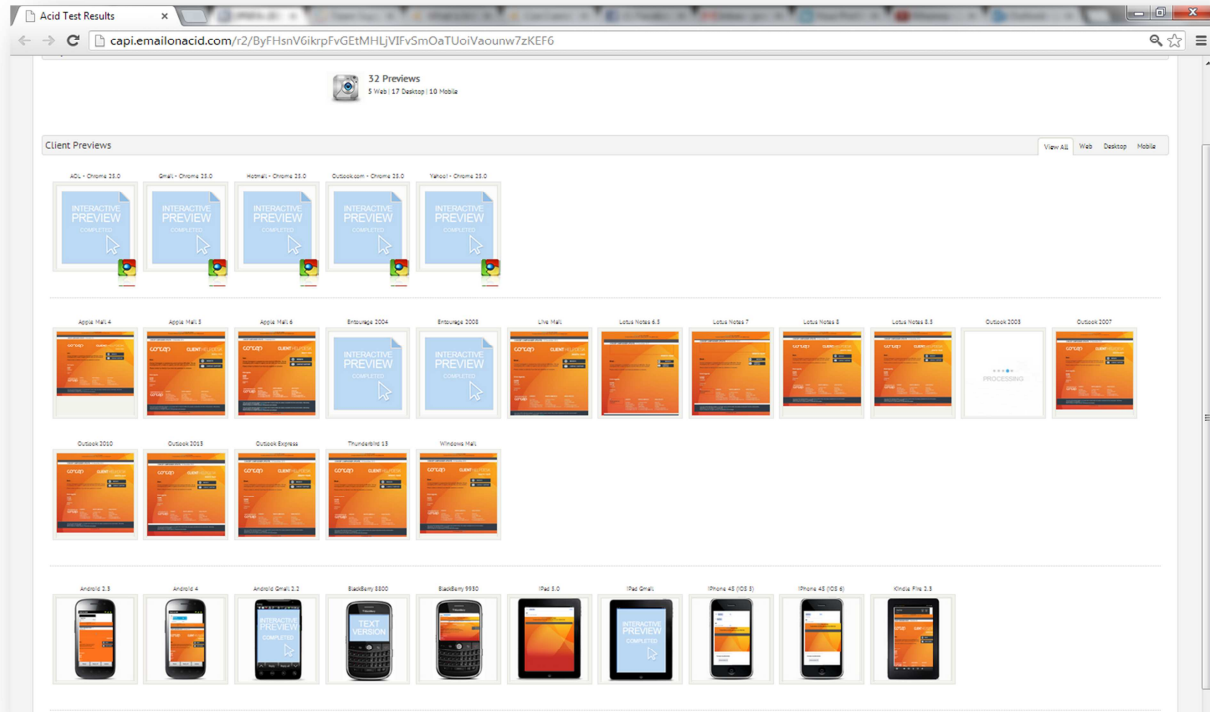
<input checked="" type="checkbox"/> AOL <small>Windows - Chrome</small>	<input checked="" type="checkbox"/> Gmail <small>Windows - Chrome</small>	<input checked="" type="checkbox"/> Hotmail <small>Windows - Chrome</small>	<input checked="" type="checkbox"/> Outlook.com <small>Windows - Chrome</small>	<input checked="" type="checkbox"/> Yahoo! <small>Windows - Chrome</small>
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Note: The templates we provide have been tested in the major email clients. If the content you have placed in a template is not displaying correctly, refer to this [KnowledgeBase article](#) for tips on resolving the issue.

[Run Preview](#) 

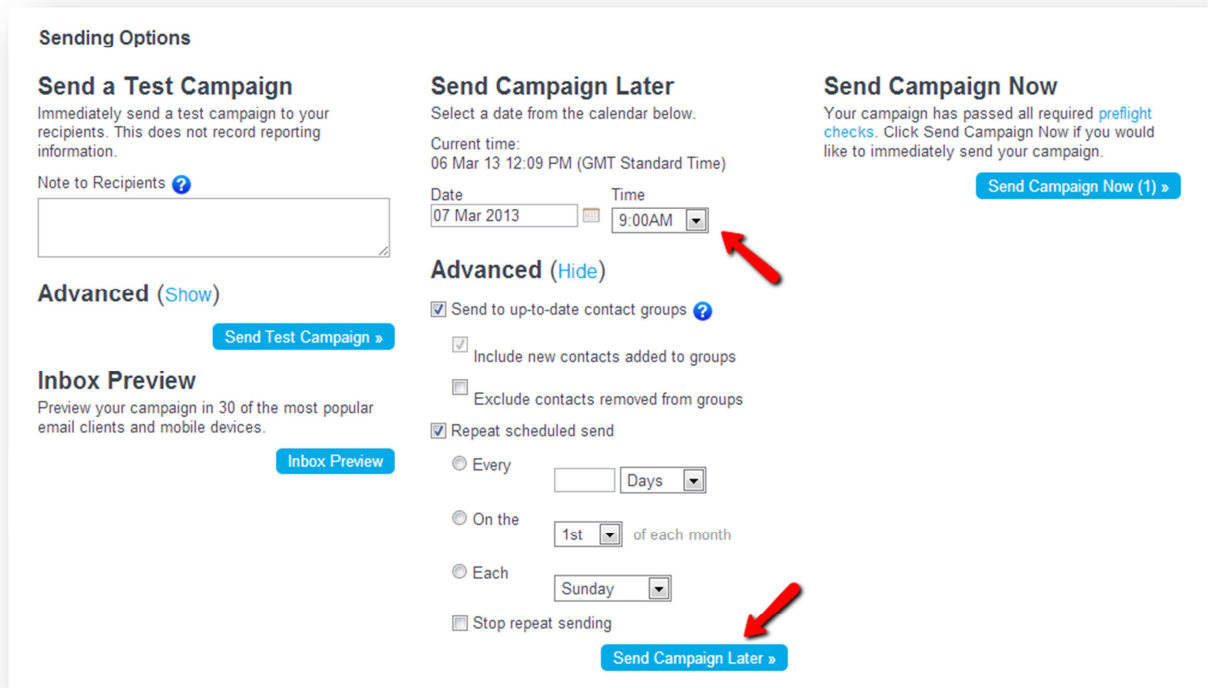
Campaign ID: 1588939684132001048763 [Close](#)

You will be taken to a third party website, Email on Acid, to view the previews (some of which are interactive).



### 3.5 Scheduling

You can schedule a campaign to be sent out at a later date. Use the date and time drop down menus to select the desired date and time for send.



There are also two advanced schedule options available:

- **Send to up-to-date contact groups**
- **Repeat scheduled send**

You can select whether to send your campaign to up-to-date contact groups. When the **'Send to up-to-date contact groups'** option is selected, two further check boxes appear.

If the option is enabled, the system will check for any new contacts that have been added to the group(s) that were included in the campaign before sending.

You can also optionally choose to exclude any contacts that have been removed from the group since the time of scheduling (thus truly making it 'up-to-date').

There are two settings (under Settings > Email) to turn one or both of these options on by default.

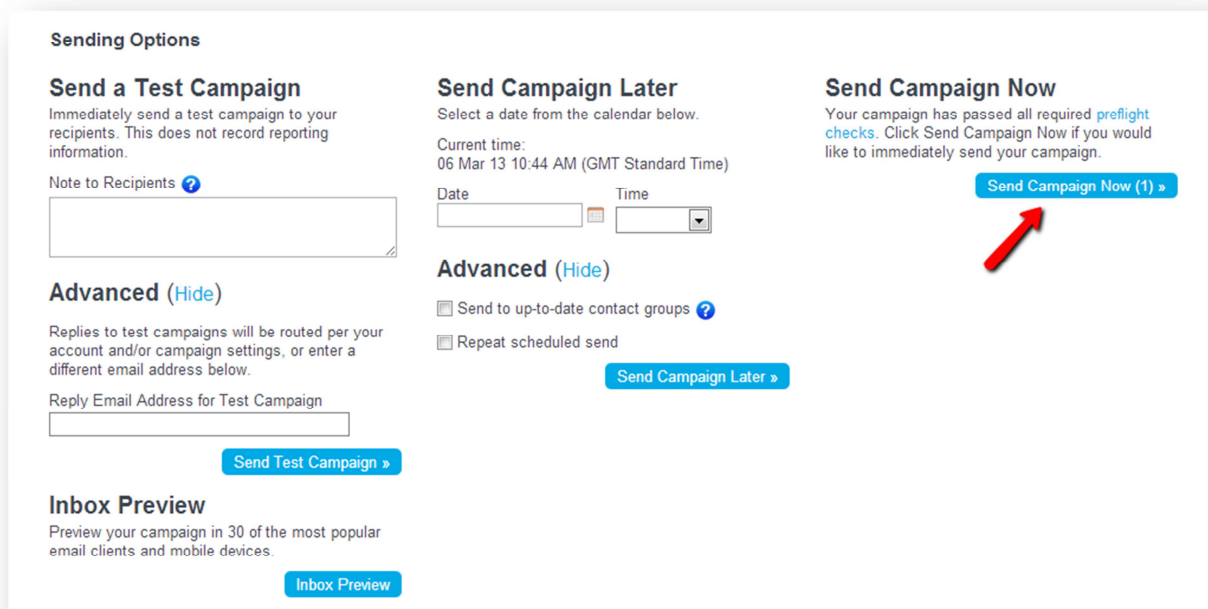
Send to up-to-date contact groups by default	Automatically select the "Send to up-to-date contact groups" option when scheduling	No	<input checked="" type="checkbox"/>
Exclude contacts removed from groups	Automatically select the "Exclude contacts removed from groups" option when scheduling	No	<input checked="" type="checkbox"/>

There is also the option to schedule the campaign to be sent out again. By selecting the **'Repeat scheduled send'** in the **'Advanced'** option you can choose whether to send the campaign out again on a regular basis.

Once all the settings have been chosen regarding the scheduled send, select the **'Send Campaign Later'** button.

### 3.6 Send

To send the campaign immediately, select the **'Send Campaign Now'** button under **'Sending Options'**. The number in brackets on the **'Send Campaign Now'** button is the number of recipients selected that the campaign will be sent to.



## 4. CONTACT

If you would like to discuss any element of this document please contact us with the below details.

### Europe

Telephone: +44 (0) 20 7952 5570 Email: [europe@concep.com](mailto:europe@concep.com)

### North America

Telephone: +1 212 925 0380 Email: [northamerica@concep.com](mailto:northamerica@concep.com)

### Asia Pacific

Telephone: +61 (0) 2 8030 8810 Email: [asiapacific@concep.com](mailto:asiapacific@concep.com)