EMAIL MARKETING

This guide is intended to define the elements of the Big River Email Marketing module and provide step-by-step instructions for the creation of a solicitation.

DEFINITIONS

SOLICITATION - *A solicitation is a particular bulk send. It is comprised of content (message), the email list to which that message is sent, and the date/time of the send as well as reports showing the performance of the communication.*

MESSAGE - *A message is content sent via a solicitation. For example an e-Newsletter.*

EMAIL DEFINITION - *An email definition is content used in automated emails. These are not used for bulk email solicitations.*

EMAIL COLLECTION - *An email collection is a group of email definitions used for a particular purpose, for example receipts and notifications associated with a recurring giving program. These are not used for bulk email solicitations.*

LIST - A *list defines the email addresses to which a solicitation can be sent.*

STATIONERY - *Stationery is like digital letterhead. It can be applied to any email content whether a message intended for bulk send, or an email definition used for automated communications.*

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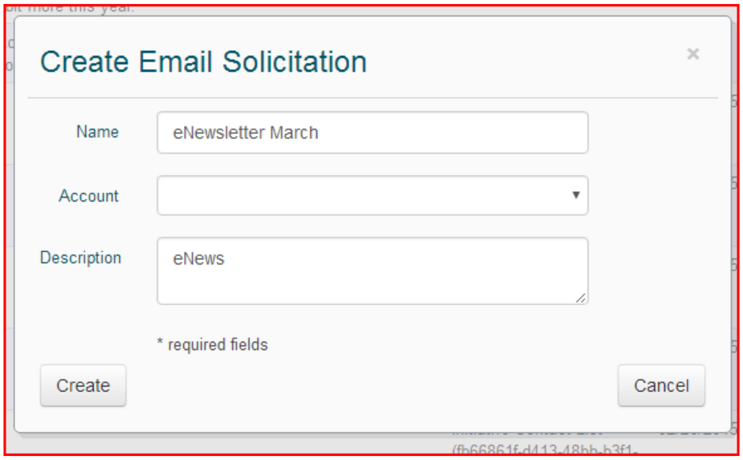
HOW TO DESIGN A SOLICITATION

1. Click EMAIL in top menu.

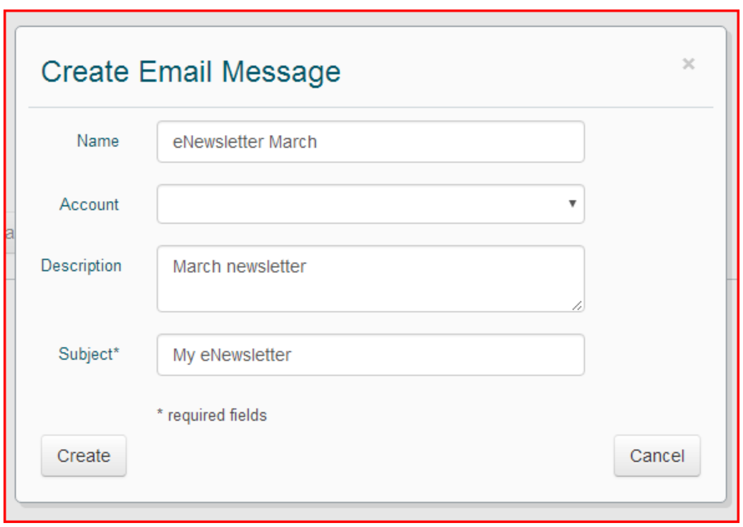
2. Click CREATE EMAIL SOLICITATION button.



3. Click CREATE button.

4. On the left, click EMAIL CONTENT

5. Select from the dropdown menu, or click “+” to create new content.



6. On the left, click EMAIL SETTINGS. This shows the email address from which your email will be sent. If you have multiple “from” emails set up in the system, you can select one using the dropdown menu next to Email Settings.

7. On the left, click Body. In the HTML editor, create the content for your email.

DESIGN FROM SCRATCH: Upload images, insert text and use the editor tools to configure your email.

USE AN EXTERNAL TEMPLATE: If you want a more structured email, you may want to work from an html template. To do this:

- Copy the html from the desired template
- Click the SOURCE button on the editor.
- Paste in your html.
- Click the SOURCE button again.
- Save.

Now you can modify your template in the editor to customize for your current mailing.

8. To PREVIEW your content, click TASKS button on the bottom right and select "Preview" from the menu.

9. Once you are happy with your content, click SAVE & EXIT.

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HOW TO SEND A SOLICITATION TO AN EMAIL LIST

1. Login to Big River and click EMAIL in the top menu.

2. Click OPEN to the right of the solicitation you want to send.

3. Click EMAIL LIST in the left menu.

4. Use the drop-down menu to select an existing list, or click "+" to create a new list *(for instructions on creating a new list, see HOW TO CREATE A MAILING LIST)*

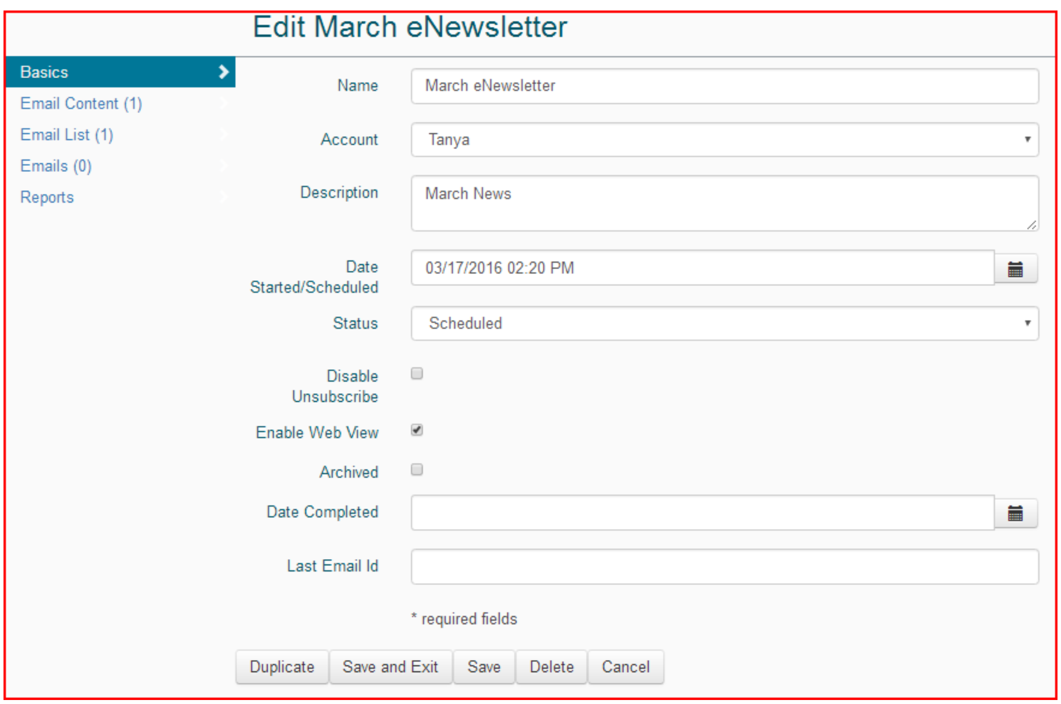
5. Click EMAIL in the left menu.

6. Click TASKS on the bottom right.

    To Send A Test Email – select TEST EMAIL – a test email will be sent to the email address associated with your Big River account.

    To Send Immediately – select START EMAIL from the menu.

    To Schedule Future Send – select SCHEDULE EMAIL. In the box that appears enter the date/time you want the email to start sending. If you go back to BASICS in the left menu, the status of the solicitation will now be "Scheduled" and you will see the date/time it is slated to go out.



HOW TO CANCEL A SCHEDULED SOLICITATION

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1. Login to Big River and click EMAIL in the top menu.

2. Click OPEN to the right of the solicitation you want to cancel.

3. Click TASKS on the bottom right and select CANCEL from the menu.

*To re-schedule the solicitation, click TASKS and select SCHEDULE EMAIL. Identify the date and time you want to solicitation to go out and click

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HOW TO UPDATE A CONTACT'S EMAIL ADDRESS

1. Login to Big River and click CONTACTS in the top menu.
2. Click the magnifying glass icon on the top right.
3. In the email field, enter the email address that needs to be updated.
4. Click SEARCH
5. Click OPEN to the right of the contact record.
6. Click CONTACT INFO on the left menu.
7. Put the new email address in the Email field.
8. Save & Exit.

HOW TO ADD ADDITIONAL CONTACTS TO AN EXISTING LIST

(Only Defined Lists can be modified in this way)

1. Login to Big River and click EMAIL in the top menu.
2. Click LISTS on the left menu. And click OPEN to the right of the list you want to update.
3. Click TASKS on the bottom right and select IMPORT EMAILS.
4. Click ADD button and select the Excel file for import.

IMPORT FILE – be sure your import file is an Excel spreadsheet with emails listed in the first column

5. Check the box to confirm that you have permission to send to these email addresses and click SUBMIT.
6. If you go to the end of the contacts in this list, you should see the newly uploaded contacts at the end.
7. SAVE & EXIT

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HOW TO EVALUATE PERFORMANCE

1. Login to Big River and click EMAIL in the top menu.
2. Click OPEN to the right of the solicitation you want to evaluate.
3. Click REPORTS on the left menu

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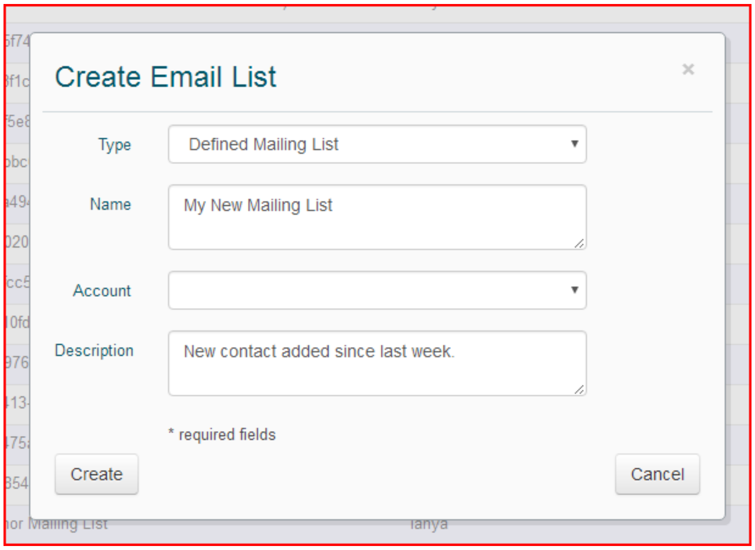
HOW TO CREATE AN EMAIL LIST

There are a variety of list types that can be created to help you segment your audiences and send targeted messages. Below are the most commonly used list types.

DEFINED MAILING LIST

A defined mailing list is an uploaded list of external contacts.

1. Login to Big River and click EMAIL in the top menu.
2. Click LISTS in the left menu.
3. Click CREATE EMAIL LIST.
4. Select "Defined Mailing List" from the dropdown menu and add name / description:



5. Click CREATE.
6. On the bottom right, click TASKS and select "Import Emails".

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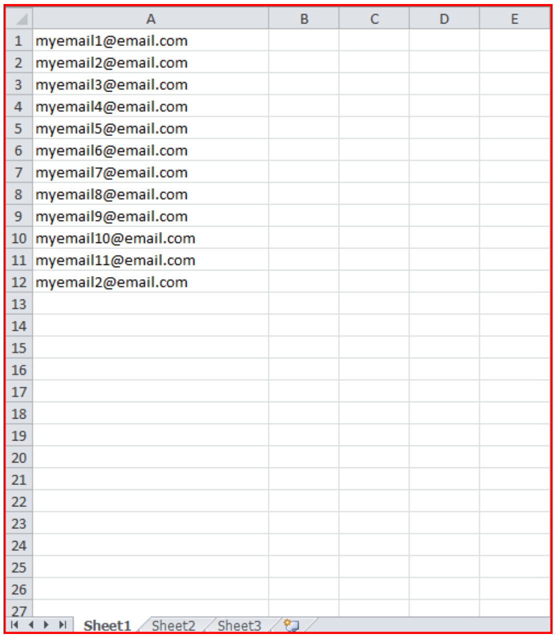
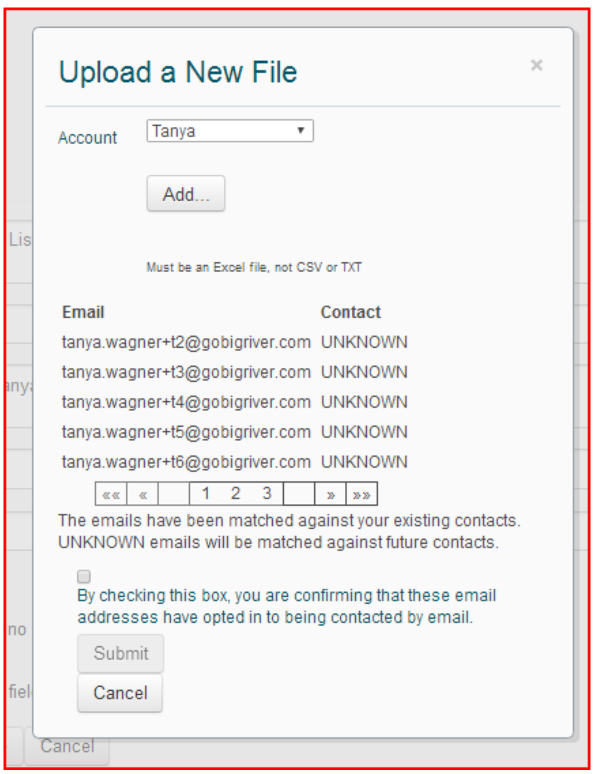
IMPORT FILE – be sure your import file is an Excel spreadsheet with emails listed in the first column



7. Check the box to confirm that the imported emails have opted in and click “Submit”.



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COMPOUND LIST

Creating a compound list allows you to send to any list(s) but exclude a subset. For example, you might want to send an email to all contacts who registered for your annual event the past two years, but exclude those who already registered for this year's event.

1. Login to Big River and click EMAIL in the top menu.
2. Click LISTS on the left menu.
3. Click CREATE EMAIL LIST button.
4. In the "Type" dropdown, select "Compound Mailing List
5. Click SELECT to the right of "Include Lists" and identify the contacts who should receive this mailing.
6. Click SELECT to the right if "Exclude Lists" and identify the contacts who should NOT receive the mailing.
7. SAVE & EXIT

FORM LIST

Form lists are comprised of contacts who have transacted on selected Big River page/forms. For example, if I want to send to all contacts who purchased a membership online, I would include all my member pages/forms. I also have the option to exclude contacts who have transacted on particular pages.

1. Login to Big River and click EMAIL in the top menu.
2. Click LISTS on the left menu.
3. Click CREATE EMAIL LIST button.
4. In the "Type" dropdown, select "Form List".
5. Click SELECT to the right of "Include Forms" and identify the contacts who should receive this mailing.
6. Click SELECT to the right of "Exclude Forms" and identify the contacts who should NOT receive the mailing.
7. SAVE & EXIT

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UNOPENED EMAIL MAILING LIST

This is a list of contacts that were sent an email solicitation and did not open it.

1. Login to Big River and click EMAIL in the top menu.
2. Click LISTS on the left menu.
3. Click CREATE EMAIL LIST button.
4. In the “Type” dropdown, select “Unopened Email Mailing List”.
5. Click EMAIL SOLICITATIONS on the left menu.
6. Click SELECT button on the right to select the solicitations.
7. SAVE & EXIT

NEED ADDITIONAL ASSISTANCE?

Visit support.gobigriver.com and create a ticket or email help@gobigriver.com

- END -