silktidestudios
creative web solutions

CreateSend E-newsletter User Guide

For further support:

http://www.silktidestudios.com/support

support@silktide.com

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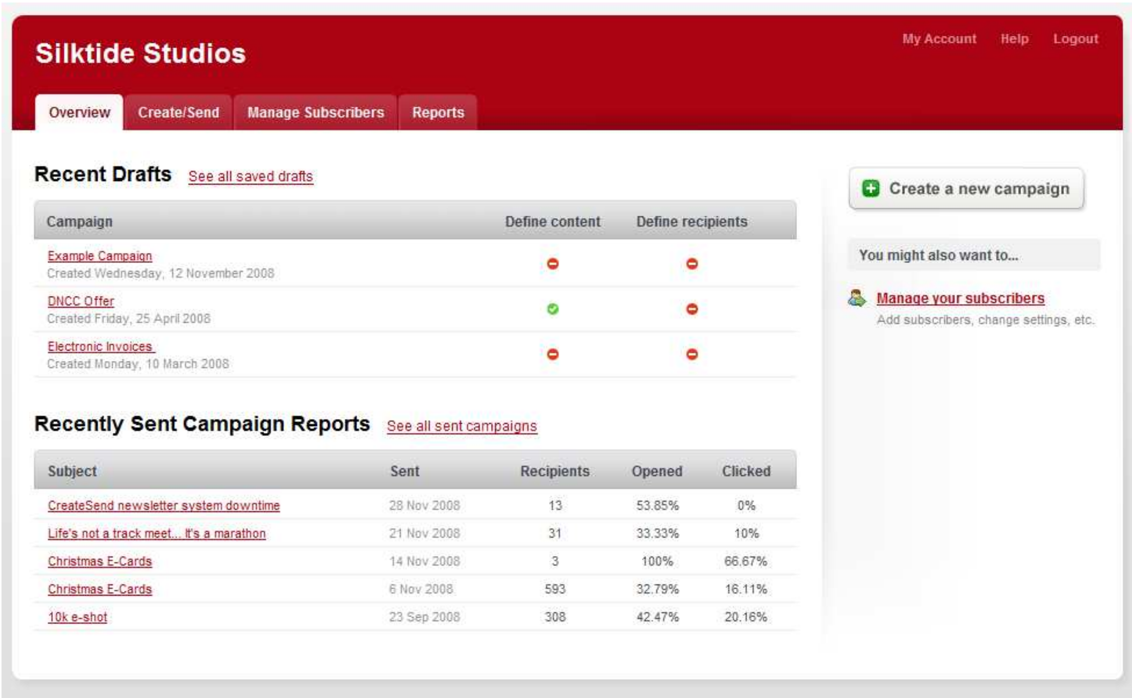
Logging in

Go to http://silktide.createsend.com. You should be presented with the following screen:

Enter the username and password that we have set up for you and sign in. You should then see an overview screen similar to this:



From this screen you can see a list of any campaigns[*] currently being built along with their status. There will also be a list of your most recent campaigns along with a brief statistical overview of how many of your subscribers opened it and then clicked through to more information. Clicking on any of these campaign names will take you through to more detailed statistics.

[*] A campaign is the term used within the system for a newsletter, e-shot or e-card. It is sent once, to one or more subscriber lists.

Managing your subscribers

Before you can send anything to your subscribers you will need to add them into the system. This is done from the 'Manage Subscribers' tab across the top.

Permission

Before you add anyone into your subscriber lists please note that you **must have been given permission** by the recipients to contact them by email. If you import subscribers that have not given their permission it is considered spamming and you risk having not only your Create Send account closed but also Silktide Studios' account.

By using the Create Send system you are agreeing to abide by these permission rules.

OK TO USE

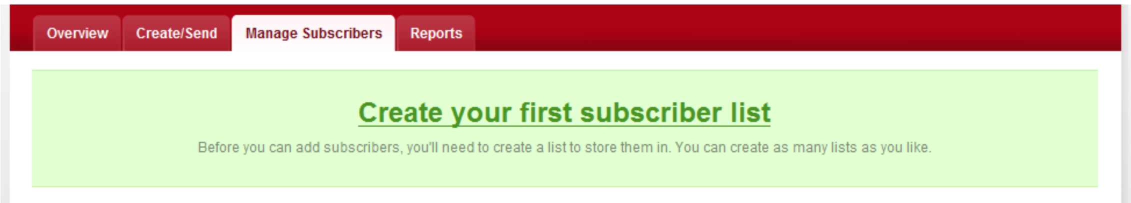
- ☑ **Opted in from my site**
  Each subscriber opted in from your own web site where you explained when and what you'd be contacting them about.
- ☑ **Purchased a product from you**
  This person is a customer that purchased from you *within the last 2 years*.
- ☑ **Handed you their business card at a trade show or other event knowing you'd contact them**
  If you told the card owner you would be in contact, you have permission. If you did not suggest either with a sign or verbally that you would be contacting them, you *do not* have permission.
- ☑ **They completed an offline form *and* indicated they wanted to be emailed**
  If someone completes an offline form like a survey or enters a competition, you can only contact them if it was explained to them that they would be contacted by email AND they ticked a box indicating they would like to be contacted.

DEFINITELY *NOT* OK TO USE

- ☒ **You haven't emailed the recipient's address for more than 2 years**
  Permission doesn't age well. Even if you got their permission legitimately, they won't remember giving it to you. If you haven't sent something to that address in the last 2 years, you can't start now.
- ☒ **You obtained the email addresses from a third party**
  Whether you purchased a list, were provided one by a partner or bought a bankrupt competitor's customer list, those people never gave YOU permission to email them and they will consider your email spam. No matter the claims of the source of this list, you cannot email them with the Create Send system.
- ☒ **You scraped or "copy and pasted" the addresses from the Internet**
  Just because people publish their email address doesn't mean they want to hear from you.

Creating your first list

Click on the 'Create your first subscriber list' link in the green box:



On the following page give your new list an easy to remember name that you'll recognise when you're sending an email, and then select your list type from the drop down box. The list type is only used when new subscribers join your list via a form on your website. **Single opt-in** means new subscribers are added to this list as soon as they complete the subscribe form. **Confirmed opt-in** means a confirmation email will be sent with a link they must click to validate their address. When you import an existing list of subscribers directly into the system they will not be emailed for confirmation so please make sure you only import the details of subscribers who have agreed to be contacted.

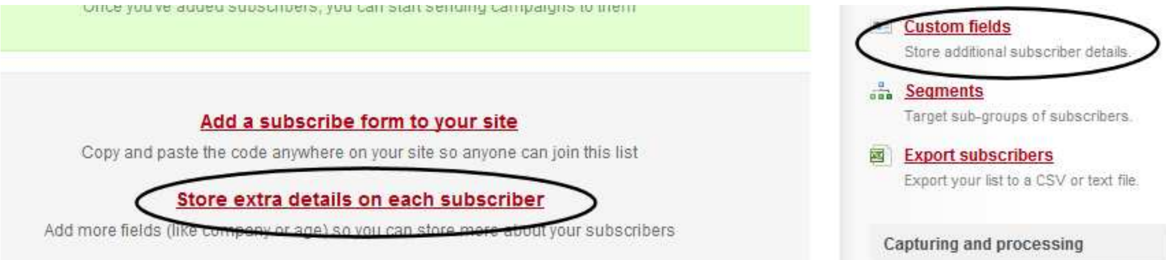
Click the 'Create List' button to continue.

Adding new subscribers

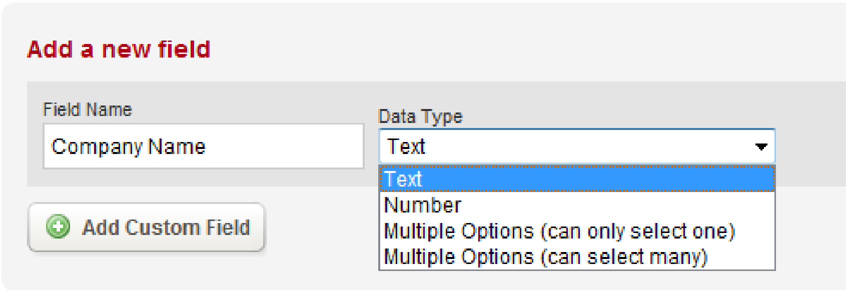
Custom fields

The basic information stored about each subscriber is their name and their email address, however, you can store more information by creating custom fields. This information can then be used to personalise your newsletters or to create 'segments' of your list to target specific groups.

To create custom fields, before importing your subscribers click on the 'store extra details on each subscriber' link in the main body of the page, or the 'Custom fields' link on the right hand side.



To add a new custom field, enter a descriptive name for the field and select the type of data it will be - text, a number or a pre-defined list of selectable options. If the field has pre-defined options, you'll need to add them too. Click the 'Add Custom Field' button and repeat for each new custom field.

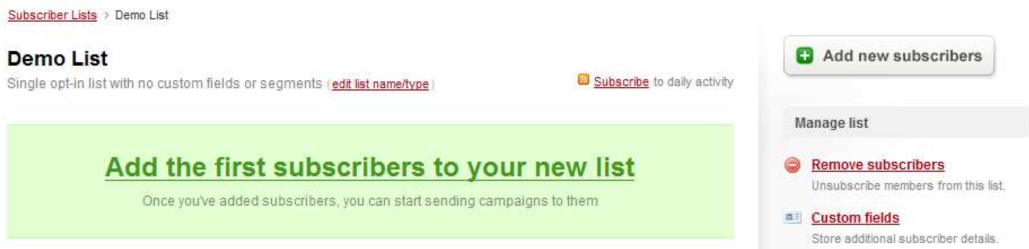


You can have **up to 10 custom fields** at any time plus name and email address. Your existing fields will be displayed at the bottom of the page.

When you have finished adding your custom fields, go back to your new list by clicking on the list name in the breadcrumb trail.

Importing existing subscribers

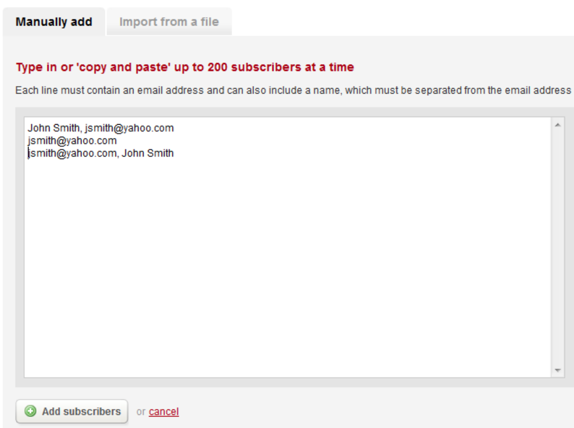
Now you are ready to import your subscribers click on the 'Add the first subscribers to your list' link in the main body of the page, or use the 'Add new subscribers' button in the right hand column.



From here you have two options – manually adding your subscribers by typing or pasting them into the text box on the page, or importing your subscribers from an external file.

If you only have a few subscribers you can type them directly into the text box. Each subscriber must be on a separate line and in one of the correct formats:

- Name, email address
- Email address
- Email address, Name



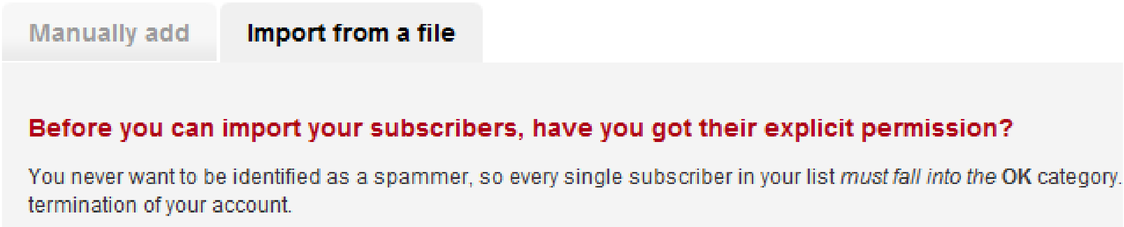
Once you have entered your subscribers (maximum 200 at a time) click on the 'Add Subscribers' button.

If there are any problems with any of the addresses you have entered they will be listed in the text box and you can either fix them and re-add them to the list, or delete them from the text box and they won't be added. No incorrectly formatted address can be added to your list.

Once all subscribers have been successfully added you will be taken to an overview page of all subscribers in your list.

Import from a file

If you have more than 200 subscribers, already have them in a spreadsheet, or want to add more information than just name and address, you will need to import them into the system. Above the large text box click on the tab labelled 'Import from a file'.



You will be asked to confirm that all subscribers you are importing conform to the permission rules. If they do, tick the box labelled 'All of these new subscribers fall into the "OK to use" category' then click the 'Proceed with the import' button.

To import from a file your subscribers need to be in a comma or tab delimited text file. This is a standard format for storing data and is supported by most applications, including Microsoft Excel, Microsoft Outlook, Outlook Express, ACT! and GoldMine.

Here's an example of the way a CSV (Comma Separated Values) file needs to be formatted before importing it into your account:

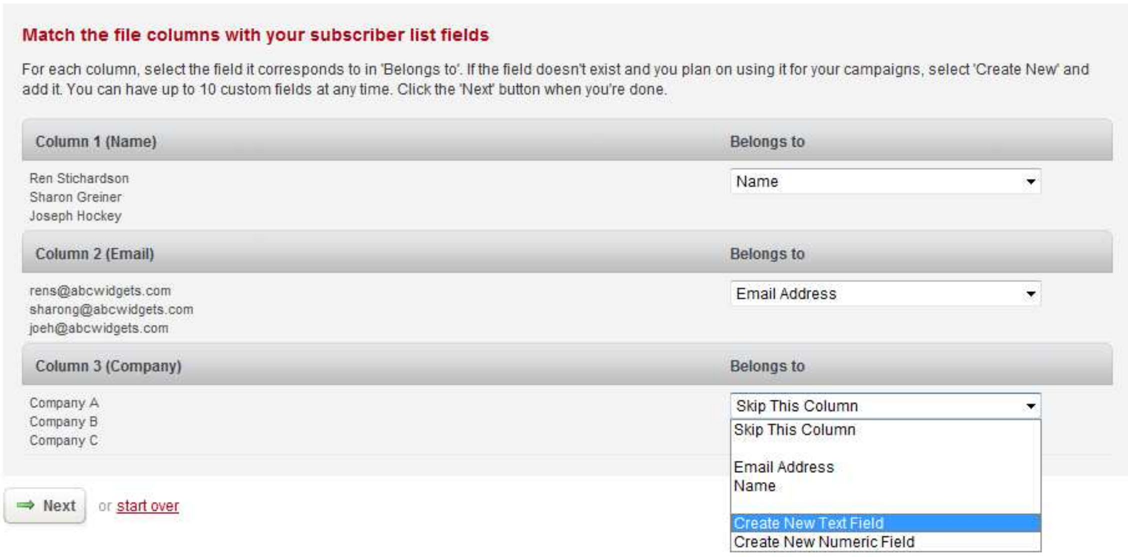
> Ren Stichardson, rens@abcwidgets.com, Company A
> Sharon Greiner, sharong@abcwidgets.com, Company B
> Joseph Hockey, joeh@abcwidgets.com, Company C

Each field is separated by a comma, and each subscriber is on a new line.

> If your subscriber list is in an Excel spreadsheet you can easily convert it into a CSV file by going to Tools > Save As and then selecting .csv (comma separated values) from the drop down file type list.

Click the "Browse" button and browse to the location of the Subscriber text file on your computer or network. After you have selected the file, click the "Import these Subscribers" button.

If your file is in the correct format (.txt or .csv), you will be asked to match the columns in your file with your Subscriber List fields. The first few lines of your file will be displayed to show you example data. Select the appropriate data type from the dropdown boxes, or if a suitable option isn't available you can create a new field from here. Then click the 'Next' button.



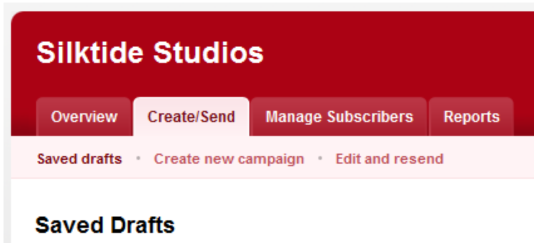
If any errors were found in your file, you will be presented with the Subscriber Import Report, which displays all of the errors founds and gives you the option of either fixing each invalid email address, or ignoring them. If you choose to fix them, click on the 'Fix these subscribers' button and you can edit them on the next screen. If you choose to ignore the errors then these subscribers will not be added to your list.

Once all subscribers have been successfully added you will be taken to an overview page of all subscribers in your list.

Creating a new campaign

Setting up a new campaign

To create a new campaign, click on the button on the right hand side of the screen:



Alternatively, click on the 'Create/Send' tab across the top of the screen, then click on the 'create new campaign' link below.

Naming your campaign

Give your campaign a name that will help you recognise it when you come back into the system later. This name won't appear to your subscribers when you send the campaign but if you have sent campaigns automatically displayed on your website this is the name that will appear, so make it sensible and descriptive.

Campaign subject

This is the subject text that will appear in your subscribers' inbox. It needs to be inviting to encourage your subscribers to open the campaign but should not include terms that could result in your email being marked as junk mail.

From name

This is the name that will appear in the inbox of your subscribers letting them know who the email is from. It's a good idea to use a name that they will recognise to encourage them to open your email, so your company/organisation name may be better than an individual.

From email address

This is the email address that your campaign will appear to come from. This should be an email address that exists to prevent the email being marked as spam.

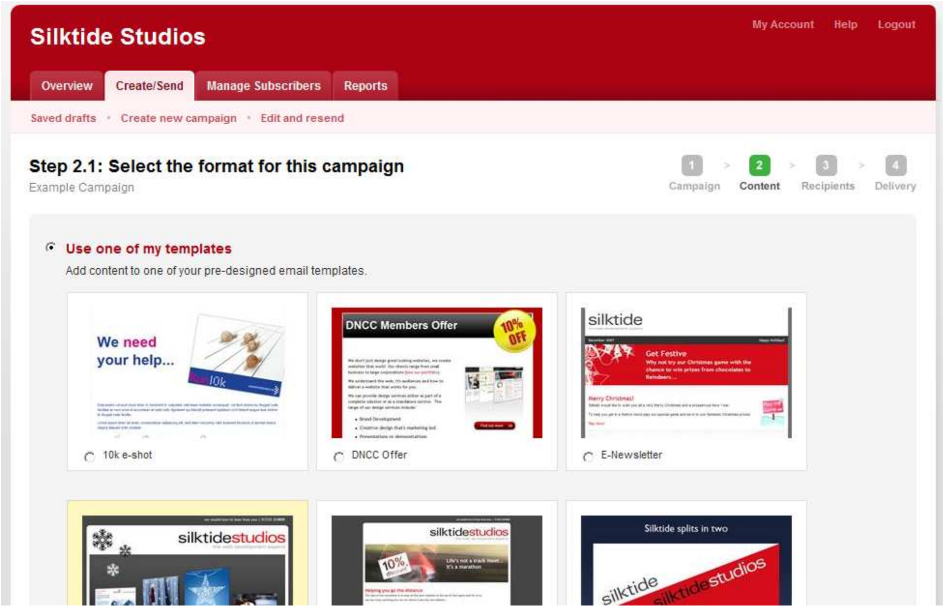
Reply-to address

This is the email address that any replies to your campaign will be sent to. Auto-responders or out of office replies from your subscribers will also go to this address.

Once you have filled in all these fields click on the 'Next' button to go to the next page.

Selecting your template

On the template selection page you should see thumbnail images of the templates available to you.



Select the template you wish to use, and then click the 'Next' button.

Adding your content

When the editor first opens you should see your basic newsletter layout in the main body of the page and a grey bar across the top of the page. In this grey bar there are two buttons, the left 'Previous' button will take you to the previous page (usually the campaign overview page) and the right 'Preview email' button will show you your newsletter without all of the editing tags and icons so you can see how it will look to your readers.

Adding articles

In the space where your articles appear you should see something like this:

This shows that each article has an editable title and content region. Click on the yellow pencil icon ( ) to edit this article – the top of the page should open up to display an editor.

The title of your article goes in the top box. If you want to make this title text a link to the relevant article on your website, click the link icon ( ) to the right of the box – another box will appear underneath for you to type in the full web address that you want it to link to. If you can't see this link icon it means the functionality isn't currently present in your template.

The main body of your article goes into the large white box. You can either type directly into this box and format it using the toolbar above, or copy your content from elsewhere (if you copy from a different program you may get a message appear asking you to allow the content to be pasted in). As you enter content you should be able to see it updating in the main body to give you a preview of what it will look like.

To add a link into your body text, highlight the relevant word(s) and click the link icon ( ) on the toolbar. This will load a pop up window where you add the web or email address you wish to link to.

Linking to a document

If you want to link to a document rather than a web page you will first have to upload the document elsewhere, as this system cannot host files. If you have a website using Site Manager you can upload your document to the Files area and publish it. The web address you will then need to link to will be in the following format...

http://www.yourwebsiteaddress.com/files/your_file_name_here.doc

...where your website address will be the first part, followed by /files/ then the name of the file you uploaded with any spaces or unusual characters replaced with an underscore _ character.

Note: The filename used here will be the name you typed into Site Manager, not the original name of the file you uploaded.

Make sure you test the link to the file before sending your campaign.

Adding an image

If your template is set up to add images to each article you should see an image icon ( ) directly underneath the text area. Click on this icon and a browse function should appear allowing you to select an image from your computer. The image will resize automatically to a predefined height or width as set in the template.

Note: There can only be one image per article and its position within the article text cannot be customised on a per-article basis.

Saving your article

When you have finished adding your article content click on the 'Save' button and the editor will close.

Adding another article

To add another article click on the 'Add New Item' button below the latest article. The editor will re-open and you can add another article in the same way as the first. There is no limit to the number of articles you can add.

Reordering your articles

Once you have more than one article in place a new move icon ( ) should appear next to the titles. Click on the icon and drag the article to the new position.

Deleting an article

To delete an article click the red delete icon ( ) next to the relevant article title and confirm that you want to delete it - this cannot be undone!

Adding other content

Depending on your template you may have other editable regions within your newsletter. Any editable text areas will be identifiable by the yellow edit icon ( ). Click on this icon and edit or add your text as appropriate.

If the 'add new item' button appears you can add multiple text areas in this section but if no button is visible it means the template has been limited to just the one editable region here.

There may also be areas in your template where images can be added outside of the articles. These regions can be identified by an image icon and the word replace. Click on the icon to load the editor at the top of the screen. Here you can browse to the image on your computer and, if available in your template, set a link to point the image to.

Define recipients

When you are happy with your campaign and don't want to make any further changes click on the 'I'm done, return to snapshot' button on the preview screen, this will take you back to the campaign overview.

To select your subscriber list click on the 'Define Recipients' button.

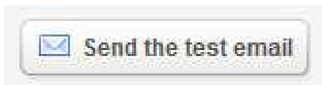
You will be shown a list of all the subscriber lists you have created, tick the boxes next to whichever lists you wish to send to – if someone appears on more than one list they will only receive your email once. Click 'Next' to go back to the overview screen.

Sending your campaign

When you are ready to send your campaign click on the 'Test and define delivery' button at the bottom of the overview screen.

Before sending your campaign to all your subscribers it's a good idea to send yourself a test version. This allows you to see the campaign in your email client and check that all links within your campaign are working correctly. It also allows you to send a version to a few other people for proof reading or sign off. The email that appears in your email client will have the subject appended with " – Preview " and if your template is set to display any personalisation it will randomly select a subscriber from one of your selected lists and display their information.

Enter up to five email addresses into the 'Email' box, each separated by a comma, or if you have previously entered email addresses here you can select them from the list below, then press the 'Send the test email' button. You'll get a green bar across the screen confirming that the tests have been sent. Check your email to view the preview campaign.



When you are ready to send the campaign to your subscribers click on the 'Next' button. This *will not* send your campaign just yet.

On the next screen you have two options – you can either send the campaign immediately, or schedule it to be automatically sent at a later date and time. If you want to send it now make sure that the 'Deliver the campaign immediately' option is checked and fill in your email address below to get a conformation email when the sent has completed.

If you want to schedule the campaign for a later send make sure the second 'Deliver at the following time' option is checked.

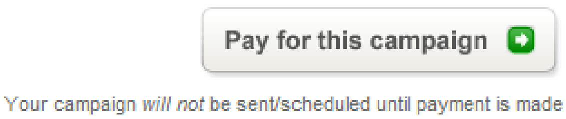
Select the date and time when you want the campaign to be sent – note that the default date is the next day. You can also select a different time zone if your subscribers are in a different country. Fill in your email below to get a conformation email when the sent has completed.

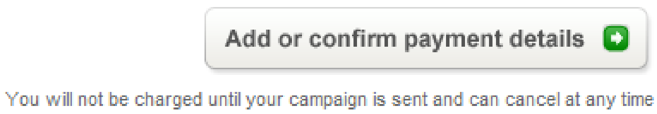
Paying for your campaign

The next steps will depend on the method of payment for your campaigns that you have agreed with Silktide Studios.

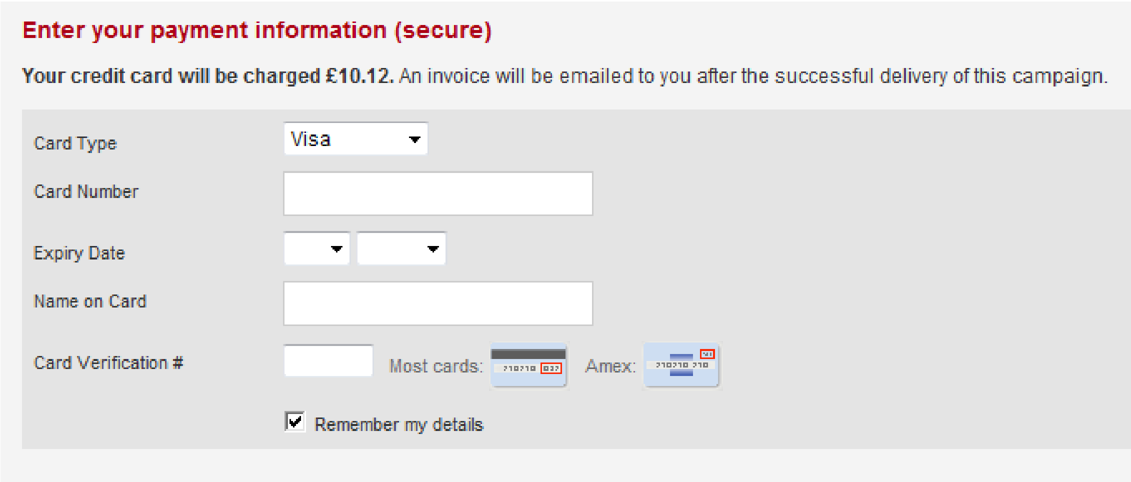
If you have opted for a collection of **pre-paid** sends, or post-send monthly **invoices** you will be able to send your campaign without entering any payment information. At the bottom of the screen you will see one of two large green buttons. Click this button to send your campaign at the time you selected in the previous step.

If you have opted to pay for each campaign yourself you will see a different button depending on your delivery option:





Click on the button relevant to go to the payment page. The cost of your campaign will be broken down at the top of the page and the total cost shown. Enter your credit card details into the payment form then click the large green button to send or schedule your campaign.

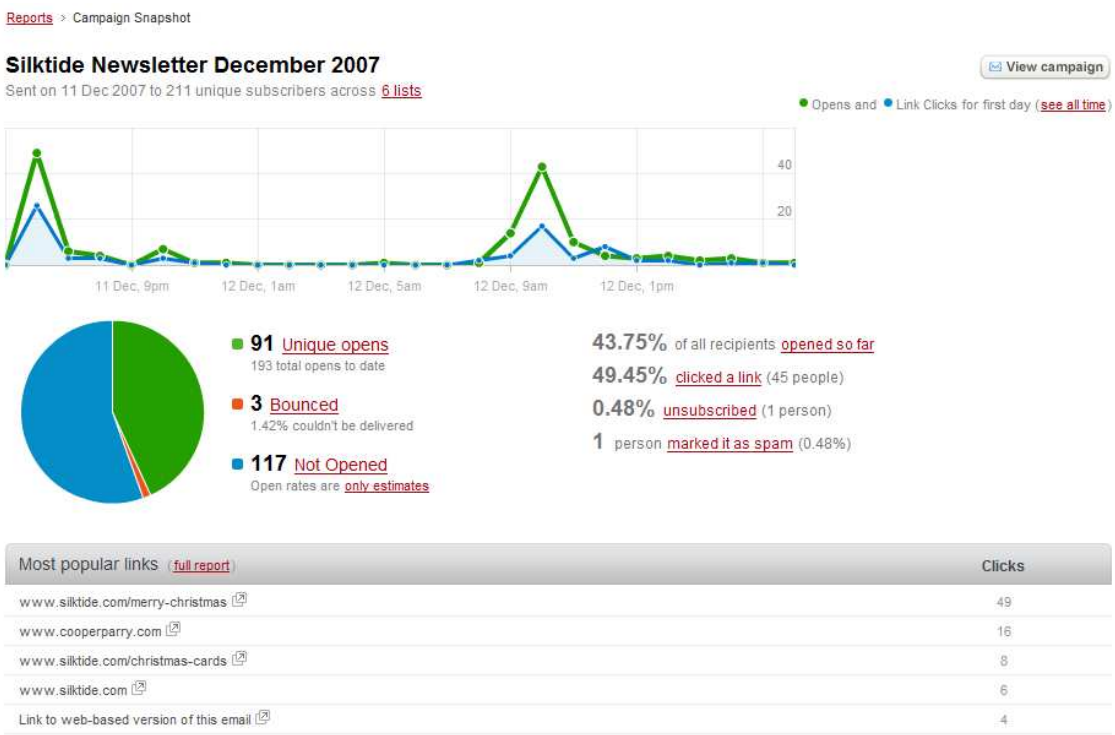


When your campaign has successfully sent you will receive a confirmation email at the address you specified. You can then log in and view the campaign reports.

Viewing reports on sent campaigns

Once a campaign has been sent you can log in to view a variety of statistics including who opened your email and when, which links were clicked on the most and by who, and see a list of anyone who unsubscribed from this campaign.

From the overview screen, or from the 'Reports' tab at the top of the screen, click on the name of your campaign to load the campaign snapshot.



A general overview of your statistics are shown on the snapshot page, you can click through to more detail about each area by clicking on the appropriate link. For example, clicking on the 'Unique opens' link displays a list of who opened your email, the number of times they opened it, and the number of links they clicked on. From here you can then click through to more detail about that individual subscriber and their email history with you, or use the links across the top or down the right of the page to access other statistical information.

Explanation of terms used

The Campaign Snapshot contains a number of important terms which explain the most recent results for each campaign you send. Below is a quick explanation about what these figures actually mean.

Total Opened

The total number of times your campaign was viewed by your recipients. This means that if you send a campaign to 2 recipients and one reads your email twice while the other reads it once, the total opened will be 3.

Unique Opened

The unique opened does not take repeat opens into account, meaning the figure represents the total number of recipients that actually opened your campaign. From the above example the number of unique opens would be 2.

Clicks

The clicks data provides a number of important figures about the links in your campaign. As an example "2,481 (14.28%) recipients clicked 7 links" tells us the following:

A total of 2,481 recipients clicked at least one link.
14.28% of your recipients clicked at least one link.
7 different links in the campaign were clicked.

Unsubscribed

The unsubscribed data tells you the total number of recipients that clicked the unsubscribe link in the campaign and also provides you with the percentage of recipients that unsubscribed.

Bounced

The bounce data tells you the total number of recipients whose emails were returned without being delivered. This could be for a number of reasons including their email address no longer exists or their mailbox is full.

Delivered

The delivered count tells you the total number of emails that were successfully delivered to your recipients. It is equal to the total number of messages sent minus the total number that bounced back. The delivered percentage tells us the total percentage of messages that were successfully delivered.

Email open rates

What is an open rate?

Open rate is a measure of how many people on an email list open (or view) a particular email campaign. The open rate is normally expressed as a percentage, and it is calculated as follows:

$$\text{Open rate} = \frac{\text{emails opened}}{\text{emails sent} - \text{bounces}}$$

So a 20% open rate would mean that of every 10 emails delivered to the inbox, 2 were actually opened.

How do you measure an open?

When each email is sent out a piece of code is automatically added in that requests a tiny, invisible image from the web servers, so when a reader opens the email, the image is downloaded, and we can record that download as an open for that specific email.

It is important to understand that the open rate is not a 100% accurate measure. Recording an 'open' can only happen if the readers email client is capable of displaying html with images, and that option is turned on. So if you are sending text-only emails, there is no way to record open rates (the exception is if they actually click a link). Similarly, people reading your html email without images showing will not be recorded as opens.

Another issue is that your readers may have a preview pane in their email client. That preview pane might be displaying your email automatically (and therefore downloading the images) without the reader ever having to click on it or read it.

So you should never take your open rate as a hard and fast number, because you can never know the true figure. It is much better used as general guide, and as a way of measuring the trends on your email campaigns.

What is a typical open rate?

Really, there is no typical open rate. The rate obtained for any list, or group of lists will depend on how it was measured, when it was sent, the size of the list and a zillion other potential variables. There is no shortage of benchmark numbers out there, but even between benchmark figures you will find big variation in the reported open rates.

If you are getting an open rate between 20% and 40%, you are probably somewhere around average.

However, there are certainly some broad trends in open rates:

- As list size goes up, the open rate tends to fall; possibly because smaller companies are more likely to have personal relationships with their list subscribers.
- Companies and organizations that are focusing on enthusiasts and supporters, like churches, sport teams and non profits see higher open rates
- More specific niche topics, like some manufacturing areas also typically have higher open rates than emails on broader topics

How can I increase my open rate?

There are a ton of elements you can vary to try to entice more of your subscribers to open up your emails. Here are just a few things you could try:

- Experiment with your subject lines: Try including details about the content of the email right in the subject line, instead of using your standard subject.
- Send on a different day: Are your subscribers too busy on a Wednesday morning to read your email, leaving it languishing down the inbox? Maybe a Friday afternoon email would be welcomed.
- Get the important content up the top: Remember that many people will see a preview of your email before deciding to open it or ignore it. Make sure your email is recognizable, and that your key points are in the top third.