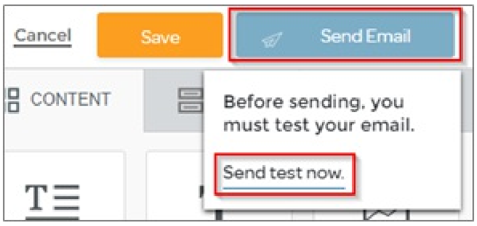
How to Send/Schedule an email in the Ascent360 Email Designer

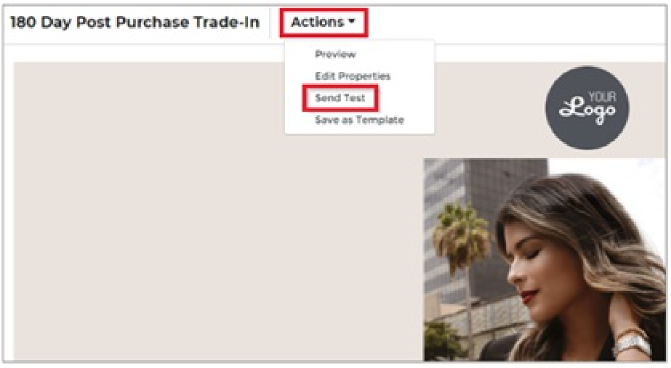
After building and saving your email creative in the Email Designer, you can now test and schedule the email.

Send a Test Email:

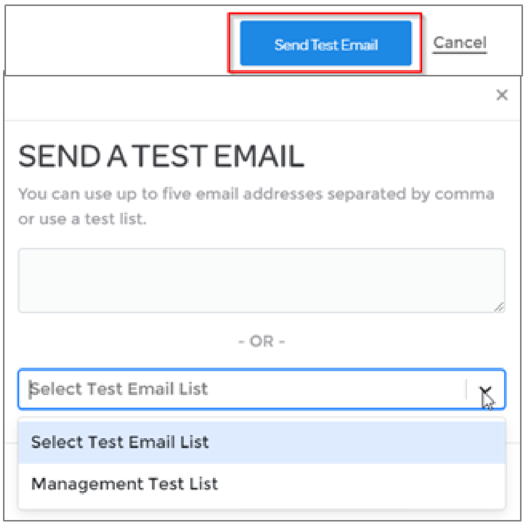
- The email must first be tested before it can scheduled. The “Send Email” button will be a greyish color when the email has not been tested. After clicking the “Send Email” button it will immediately prompt you to test the email first.
- To send the test email, click the send test now box in the prompt.



- A test email can also be sent by clicking the Actions menu above the email designer editor.



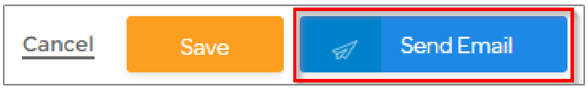
- Upon clicking either of the send test email options, you will be prompted to provide the emails to test. You can either provide a list of emails separated by comma or you can use an already uploaded test list. After entering in the emails or selecting the list, click the “Send Test Email” button.



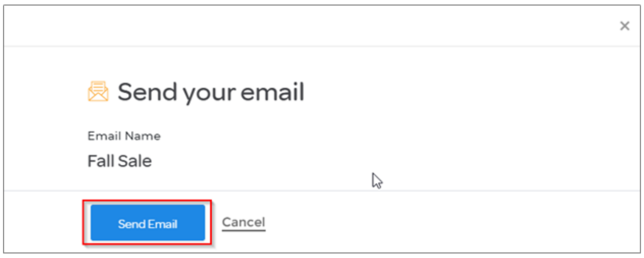
Send/Schedule a Live Email:

Once the email has been fully tested and is ready for deployment, click the "Send Email" button once again.

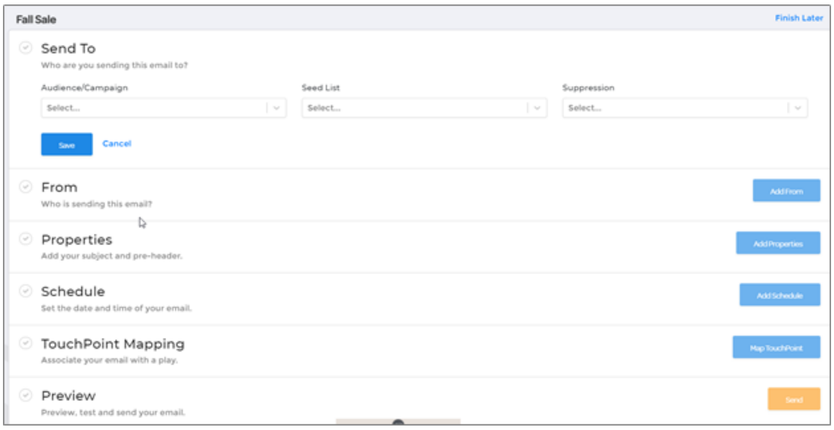
- Note, the shade of the Send Email button is a different blue which indicates the email has been tested at least one time and is ready to be sent.



After clicking the "Send Email" button it will bring up the **send your email** prompt where you click the "Send Email" button to navigate to the next step in the send process.



After clicking the "Send Email" button again you will arrive at the final sending steps page, shown below.



Note: click Finish Later" in the top right hand corner if you'd like to navigate back to your email to make further edits or send another test out.

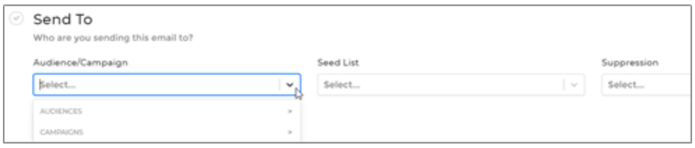
Select Your Audience & General Email Settings:

Before scheduling the email you will need to verify and select your audience and general email settings. These can be set during the design process via the Actions button as well or you can set them here. You will have a chance to verify everything before you send the email as you go through each step of the send process. Click the save button to move to the next step in the process and note that previous step after completion has a green check mark to signify it is completed. To go back to any previous step, just click the gray button on the right-hand side of the step.

Send To Settings:

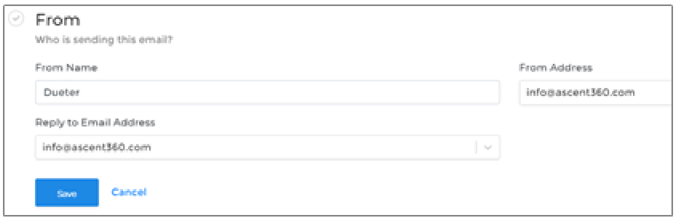
Send To: This is where you will select your audience or campaign for the email. These are directly from the saved Audiences in Audience Selector or the saved Campaigns in Campaign manager.

- Click the arrow on the right side of the drop-down list and you can choose between Audiences or Campaigns.
- Seed Lists are pre-loaded lists you can upload via the settings option in the CDP. If you have a seed list loaded, you can select that here.
- Suppression lists are also selected from Audiences/Campaigns and are used to suppress a list of contacts from an email. This is not used for generic unsubscribes and can be left blank.



From Settings:

From: This is where you the From Name, From Address and Reply-To Email Address is chosen. Note, there are default settings in place but you may have dropdown lists with options to choose from. Also, typically these are setup when you save the email but always good to double check the specifics before moving onto the next step. Click save to move to next step in process.



Properties Settings:

Properties: This is where you add your subject line, pre-header text and any tracking parameters. Again, this is something you can set up when you save the email as well.

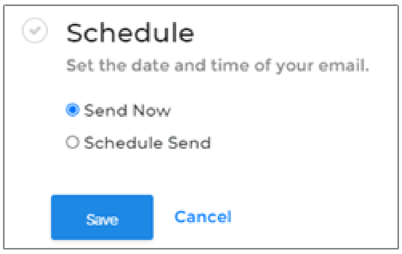
- **Make the Pre-Header Visible** Button: Select this if you'd like the pre-header text to be visible at the top of the email.
- **Tracking Parameters**: Appended to every link in the email and these must be setup prior in settings to be

available for selection when sending an email.

- Toggle the button to enable
- Choose parameters you'd like to add to email and enter in the value of each parameter. This can vary by email. If you need to add more parameters, click the Add Parameter + icon just beneath the parameter selection.

Schedule:

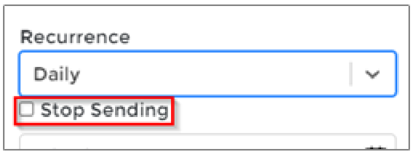
Schedule: After choosing the properties you can now schedule the email. You can choose either "Send Now" to send the email right away or select "Schedule Send."



If you choose "Schedule Send" you will be given the option to choose, Date and *Time. If this is a recurring email automation, you need to select the "Make Recurring" box beneath the date.

*Note, all times are in Mountain Standard Time so please schedule accordingly.

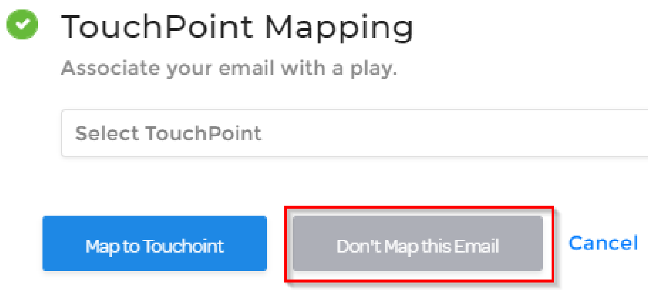
If you are setting up a recurring email schedule, after selecting the "Make Recurring" checkbox you will be given the option have the email recur daily, weekly or monthly. Select the stop sending box and add a date to have the recurring email stop on a specific day. Click save to setup recurrence.



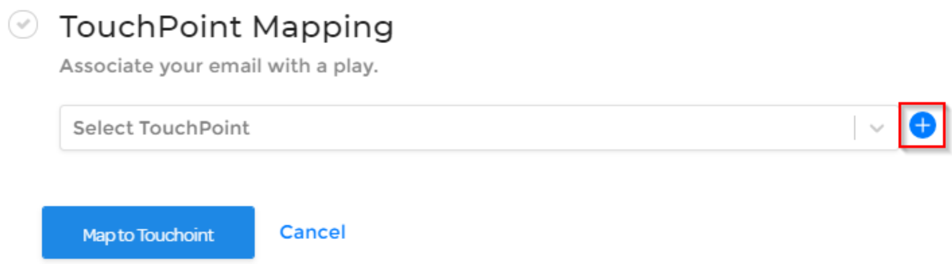
After the recurrence is setup, you will see the detail below the "Make Recurring" button.

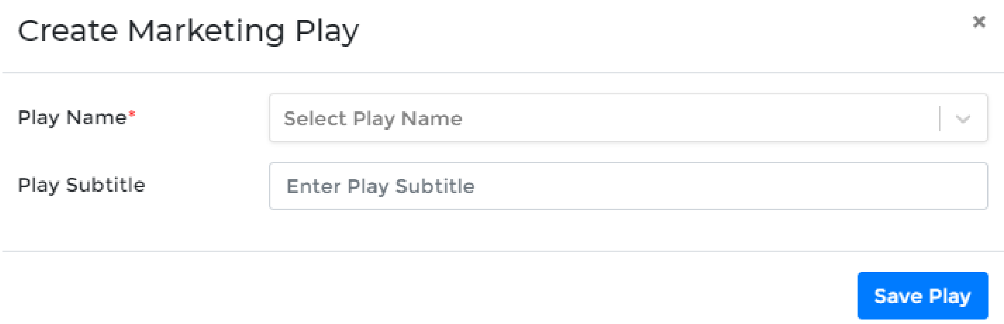
Touchpoint Mapping Settings:

Touchpoint Mapping: This is where you can map your email/campaign to a specific A360 Campaign. This is used to track revenue from these campaigns. If you have a recurring email automation, it is required to map that schedule to a touchpoint. If the email is an ad-hoc send, you can choose to not map to a touchpoint and have it roll into the *Ad-Hoc email revenue* in the CDP.

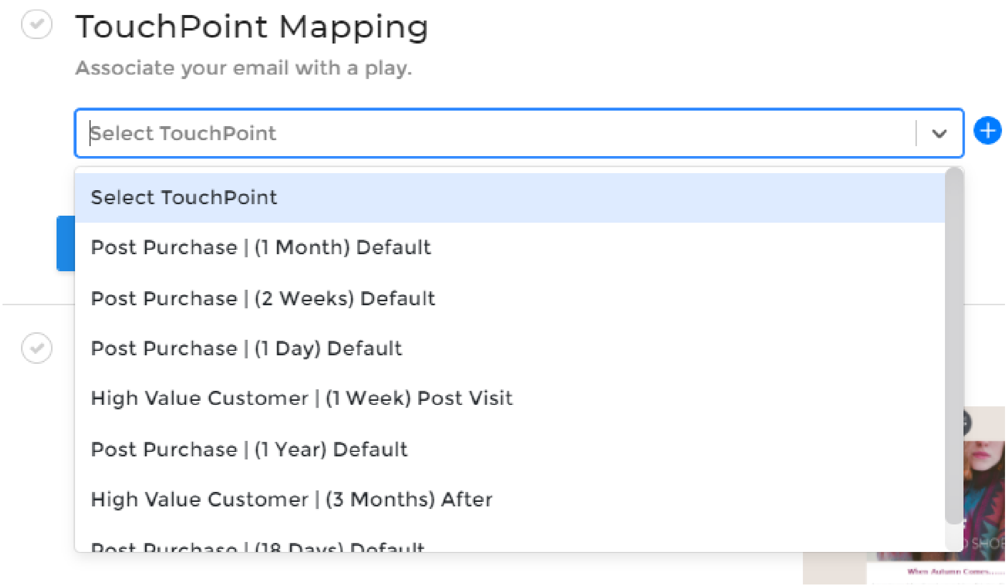


To create a touchpoint, simply click the blue **"+ icon"** next to the select touchpoint dropdown list. That will bring up the Create Marketing Campaign options. Select from one of the options that is most related to the campaign you are launching, type in the subtitle to the Campaign so you can identify this in the A360 Campaign Revenue and click save Campaign.



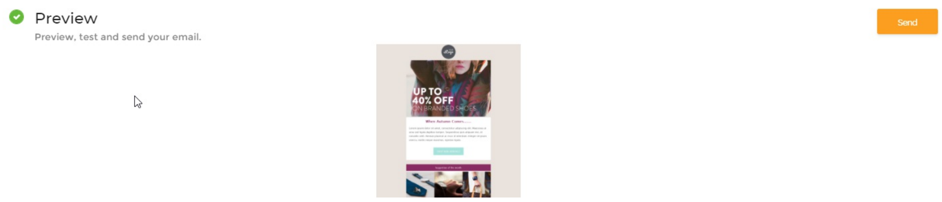


If the touchpoint has already been created, select it from the dropdown list.



Preview Section:

Preview: The final step of the send process is the Preview section. Here is where you can actually send the email. After all the prior steps are completed, this section has a **green checkmark** signifying all criteria has been met and the email is ready to be sent.



To send the email, click the yellow "Send" button on the right-hand side. A prompt will appear letting you know you've clicked send and that you are about to send a live email. Click "Send Live Email" to schedule or send the email!