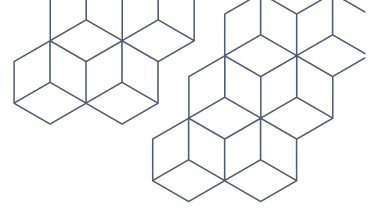# Adestra Basics Training
Handbook

This Adestra Basic Training Handbook is designed for you to follow along during your basic training session, as well as, a reference tool for after your training. In Adestra Basic Training, we cover data & lists, campaign setup, and launching and reporting.

Index

Data & Lists

Exercises:

1. Upload a standard list;
2. Creating a saved filter; and
3. Creating a dynamic list

Campaign Setup

Exercises:

1. Create a new project
2. Create a new campaign
   In this exercise we'll go over the HRS_Template Pak from a high level. Here is an infographic guide to the HRS Template Pak.
3. Setup A|B; and
4. Use a Dedicated dynamic list

Launching and Reporting

Exercises:

1. Launch test campaign and A|B split testing; and
2. Review of basic reporting
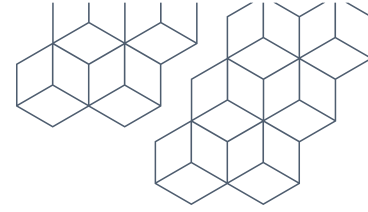
Adestra Definitions

Workspace:

Workspace is your Association's Adestra account

Projects:

Projects contain groups of campaigns and are where campaigns ar e created. Projects themselves are grouped within workspaces, which can be used for your Associations' communication types, communication categories or divisions.
i.e. 2021 | Webinars

Campaigns:

Campaigns are your marketing emails that are sent to Members.

Data:

Data relates to the information you sync or import on a member.

Core Table:

Contains all your unique records and attributes for every contact.

Note: Unique identifiers tend to default to email addresses, or are otherwise designated as the person ID as dictated by the AMS

Standard Static List:

A basic list of contacts for a specific send or as a source for an automation program. You can also add and remove contacts one-off at any time.
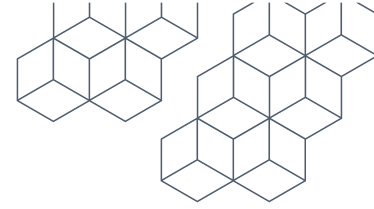
Dynamic List:

Dynamic lists automatically update at a scheduled time and/or upon launch based on list criteria.

A|B Split Testing:

A|B split tests can be as simple as a subject line A|B split, different times or more com-plex testing of the email content itself.

Section 1: Data & Lists

📝 Exercise 1: Upload a standard list

Step 1: Save your excel document as a CSV file

Step 2: Go to the Data tab in your workspace then choose to "Create new list". Give your list a name. You can choose to tag your list for easier searching later. Finally, choose your core table.

Step 3: Click save

Step 4: Click the import tab

Step 5: Choose to select the file to upload (either from your desktop or file manager)

Step 6: Be sure to keep delimiter and character encoding set as Auto Detect
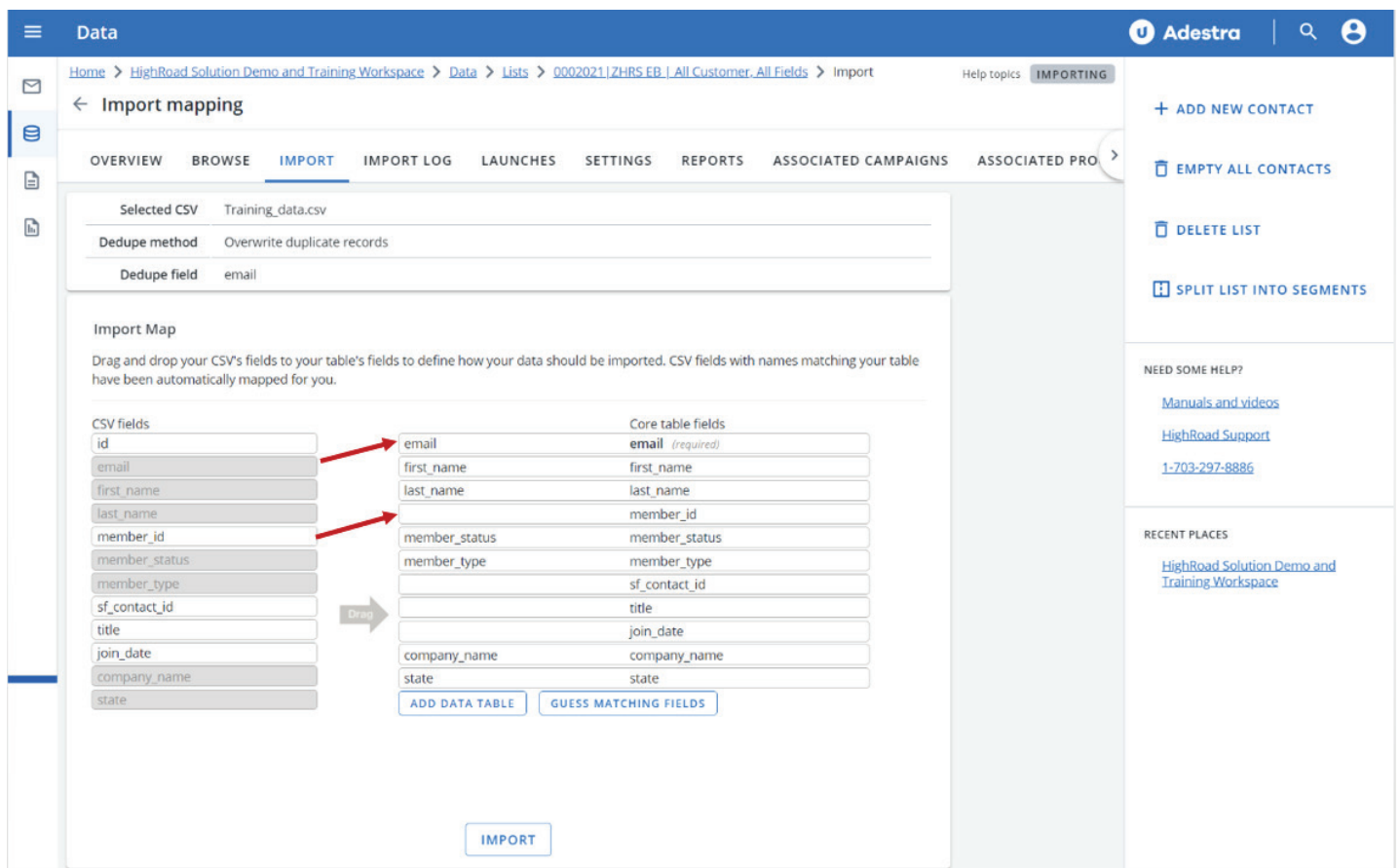
Step 7: Choose your data source

Step 8: Click Next

Step 9: Import Mapping: Fields shown on the left are fields from your CSV file (Adestra will match field(s) from your csv file to the matching field(s) on the right from your Core table).

Drag and drop any highlighted white fields to the corresponding field(s) on the right.

Step 10: Click Import

📝 Exercise 2: Creating a saved filter

1. Navigate to data >filters> navigate to the right-hand navigation and click
2. Create saved filter

   a. Setup a filter | Settings
   b. Provide your filter with a name (name your filter using the following)
   c. Your Initials | Assoc. acronym | Test Filter
   d. Provide a description (this is optional)
   e. Tags (this is optional)
   f. Select Owner (this will default to your user account)
   g. Select your core table
   h. Click Save

3. Filter editor canvas

   a. Click on New Rule | If you are looking to OR FILTER click the arrow to the right of your filter; if you are looking to do AND FILTER click the arrow below your filter
   b. Navigate to the control panel on the right-hand side;

      i. Choose your rule category > select 'field text match'
      ii. Select your rule type > select 'field contains
      iii. The required information will differ based on your rules
      iv. Click ok
      v. Select your field contains > field > select state > click ok
      vi. Match text type in the text box > VA
      vii. Click Ok
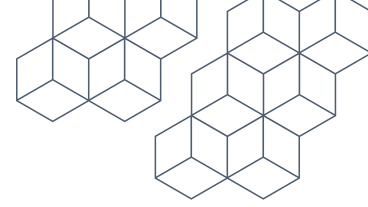   viii. Click Save Filter

Adestra

2020 EB | Training Assets | Filter By State

← **2020 EB | Training Assets | Filter By State**

OVERVIEW SETTINGS
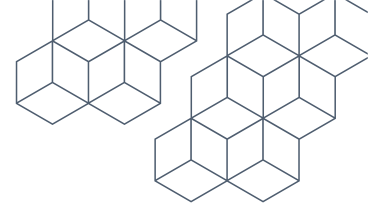
Name	2020 EB	Training Assets	Filter By State
Description	2020 EB	Training Assets	Filter By State
Owner	Erika Beshore
Permissions	This workspace
Table	DO NOT USE	HighRoad Demo and Training **BROWSE TABLE WITH FILTER**
Tags	TRAINING_ASSETS

Field contains ×

state
contains
"va, pa, ga"

Field contains

☐ Negate rule

Field
state [...]

Match text
va, pa, ga

Ok Cancel

SAVE FILTER

≔ **VIEW ASSOCIATED
DYNAMIC LISTS**

📋 **COPY FILTER**

NEED SOME HELP?

Manuals and videos

HighRoad Support

1-703-297-8886

RECENT PLACES

HighRoad Solution Demo
and Training Workspace

Field Text

Field Text Match category creates a rule which matches text within a members' record.

Date Match

Date Match category allows you to filter based on dates held within members' records.

Data Match

Data Match category lets you filter based on a member's association with certain lists or unsub lists.

Event Match

Event Match category allows you to create rules to match members' activity from previous campaigns.

Note: Using the right arrow will give you 'or' logic. Using the bottom arrow will give you 'and' logic. Rules can combine 'OR' and 'AND' logic relationships, for example you may wish to send to contacts who are on a particular list AND have previously clicked, meaning members must match both criteria to be selected. Or you may wish to send to members who are members OR students, meaning records only need to match one of the criteria in order to be selected.
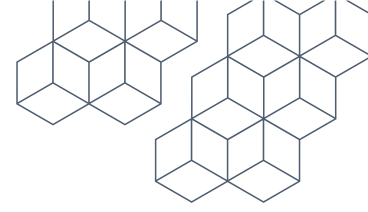
✏️ Exercise 3: Creating a dynamic list

Step 1: Choose to "Create a new dynamic list".

Step 2: Give your list a name.

Step 3: You can choose to tag your list for easier searching later.

Step 4: Select your core table

Step 5: Updating: Choose between 'Scheduled updates' and 'Automatic updates'

Step 6: Navigate down to the bottom of the page and click save (your page will refresh, and you will be taken to the overview page)

Step 7: Include Lists. Select your included list(s).

Step 8: Exclude Lists. Select your excluded list(s).

Note: dedicated dynamic lists are an option if you choose not to create a saved dynamic list.

OVERVIEW	BROWSE	IMPORT LOG	LAUNCHES	SETTINGS	REPORTS	ASSOCIATED CAMPAIGNS	ASSOCIATED PROGRAMS

|	
ID	309085
Name	ZHRS EB | 042721 Training | Dynamic List
Tags	TRAINING_042721
Description	ZHRS EB | 042721 Training | Dynamic List
Table	DO NOT USE | HighRoad Demo and Training
Record history	No
Owner	HighRoad Trainer
Workspace	HighRoad Solution Demo and Training Workspace
Created	27 Apr 2021 11:30
List size	👤 77 **UPDATE** (Last updated 27 Apr 2021 11:33)
List type	Dynamic
Scheduled update time	No schedule update
Automatic update	Yes
Include all core table contacts	No

Include Lists

ADD INCLUDE LISTS   Search term 🔍

	ID	Name	Count
☐	308732	ZHRS EB | TEST LIST ONLY | DO NOT USE	4
☐	305376	0002021|ZHRS EB | All Customer, All Fields	204
☐	304506	ZHRS EB | Standard List | 041321	204

Exclude Lists

ADD EXCLUDE LISTS   Search term 🔍

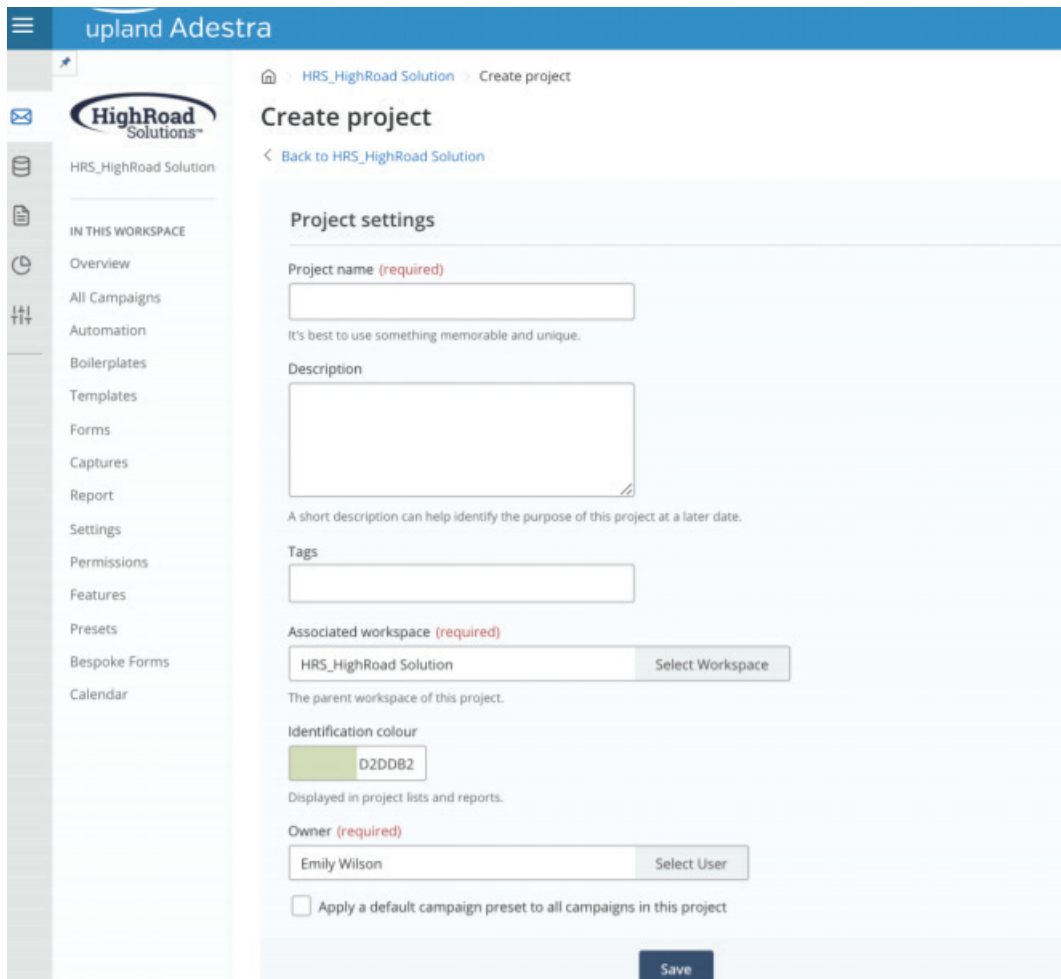|	ID	Name	Count
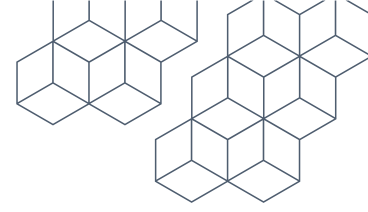
Section 2: Campaign setup

✏️ Exercise 1: Create a new Project & Campaign

Part 1: Project and Campaign Creation

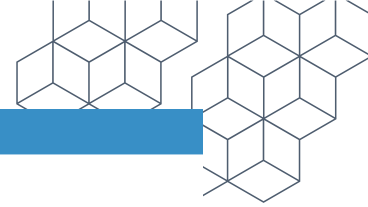**Step 1:** Create a new project, give it a name, any tags for organizing, optional default preset, and save.

Step 2: Create a campaign, give it a name, any tags for organizing, apply a campaign preset, and save.

HighRoad Solution De mo and Training Works pace

IN THIS CAMPAIGN

Overview

Options

Data

Launches

Settings

Permissions

Campaign Settings

‹ Back to EWN | HRS | Training

Campaign settings

Campaign name (required)

EWN | HRS | Training

It's best to use something memorable and unique.

Description

A short description can help identify the purpose of this campaign at a later date.

Tags

Associated project (required)

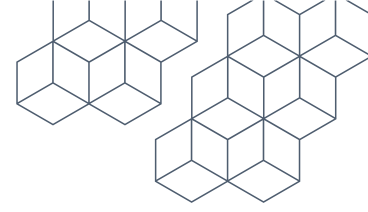Sandbox | EW   Select Project

Identification colour

B2C5DD

Displayed in campaign lists and reports.

Owner (required)

Emily Wilson   Select User

Save

Part 2: Campaign Options

Step 1: Subject line (required)
Step 2: Domain (required)
Step 3: From name (required)
Step 4: Reply Address

    a.   Check box to send replies to a custom mailbox
    b.   Provide a reply name
    c.   Provide a reply address

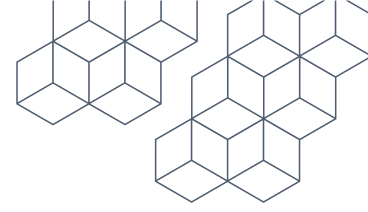**Step 5:** Unsubscribe handling (if you have a custom EPC, no need to select an option)

    a.   Insert unsubscribe link into text parts
    b.   Insert unsubscribe link into the html parts
    c.   Unsubscribe page URL

Step 6: Select your unsubscribe list
    a.   Opt-out : Global unsubscribes (used to collect inbound unsubscribes)
Step 7: Navigate to select list on the right side

Part 3: Create HTML content

Step 1: Click the 'create HTML content' button

Step 2: Edit HTML Content

> a. Click "Select Template" in the top left area to pull up your template library that will show a thumbnail of your available templates and/or your one Master Template.
>
> b. Click ok

Step 3: Choose Email Editor. In the email editor window you will see a sparse view of your master template. You will need to build out your campaign to your needs. There are three template components;

> a. Images: Working with images in your template is as easy as clicking into that component and pulling up your file manager.
>
> b. Article Titles & Article body copy: Next, you will have text areas that you can type and fill in with your copy. Here it is a typical WYSIWYG editor where you have the typical functions of a word document editor. (It is not recommended to copy and paste from a word document as this brings over extraneous code that could break an email template. Instead, it is recommended that you paste copy from a word document into a text editor first and then paste into the email editor in Adestra.)
>
> c. Call-To-Action Button: You can modify the placement of the CTA from Left, to center, to right, and finally to hide it all together.
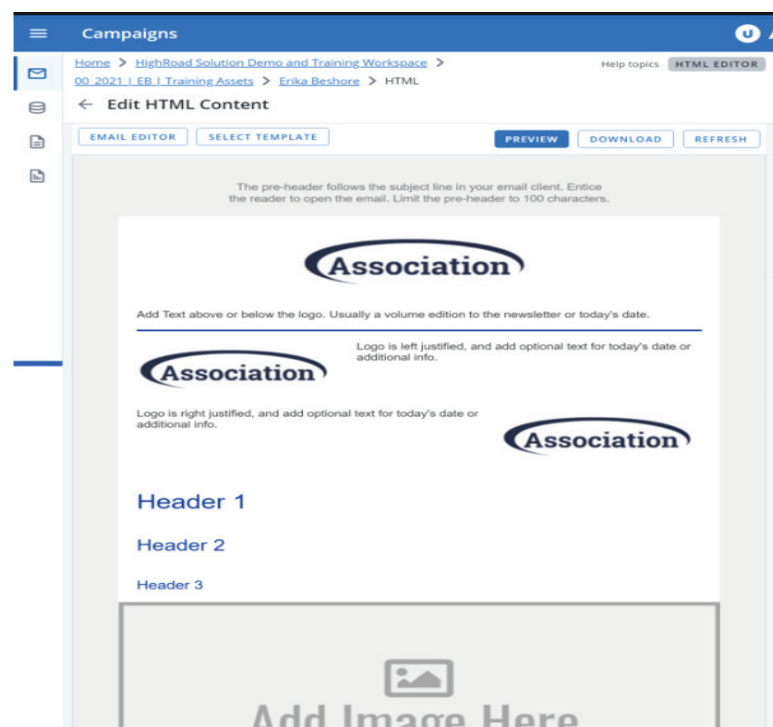
📝 Exercise 2: Setting up A|B Split

Using A|B split you can see which variant achieves the best results, and the most successful will launch automatically to the rest of your list. You will be able to see the individual results for each variant in the split test report, so you can easily compare and analyze your results, as well as a full report for the campaign.

To begin you will create a campaign, then convert your campaign into a split test taking the following steps;

1. Click the 'Split Test Campaign' link on the right sidebar on the campaign overview page.
Once you create a split test, an additional tab will be created in the overview.
The variants are assigned reference letters, with the original campaign being the 'A' variant. You can navigate between variants using the letter tabs at the top of the section.

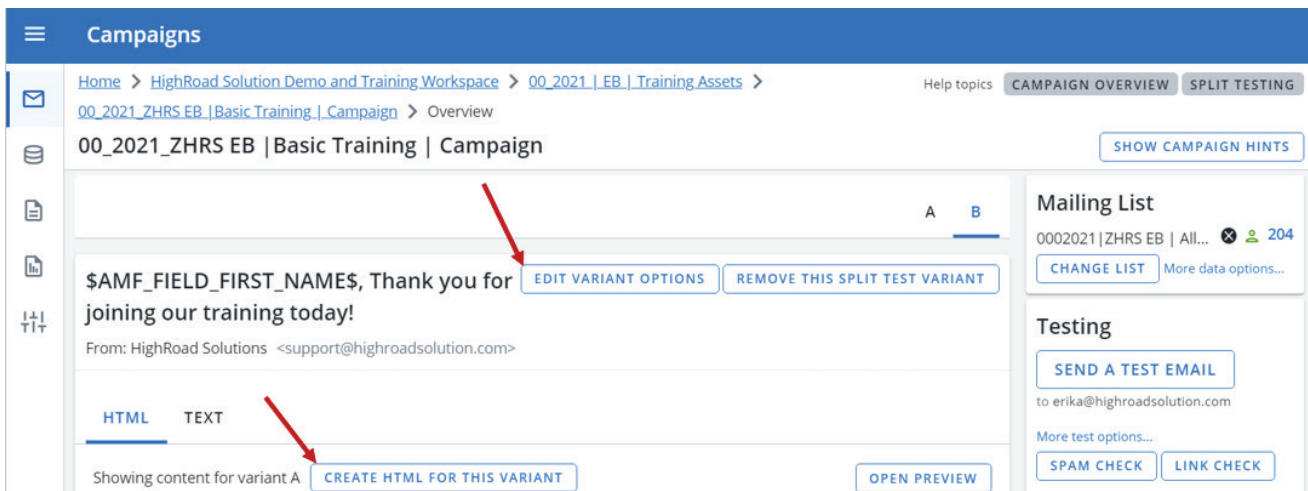2. Click 'Edit Variant Options' under the letter variants
The options you can edit are the subject line, from address, and reply address

3. Click on 'Create HTML for this variant'
Until you create content for the new variant, it will be a duplicate of the 'A' variant. Once you have created the content, you will be able to edit that content using the 'Manage HTML' and 'Manage text' buttons. For help with editing your HTML content, refer to the HTML Editor topic.

4. You can delete edited content using the 'Delete HTML variant' and 'Delete text variant' buttons, and it will revert back to showing content of the 'A' variant.

5. Proceed with editing the campaign for the new variant.

Setting up a A|B split launch includes the same elements as a regular launch, only with additional A|B Split Options available - configurable settings that define what percentage of list that will receive the split variants.

A|B Split Sending Options

1. Select the percentage of list members to receive your split variants;
2. Choose your criteria to determine your best performing variant;
3. Choose to launch the best performing variant automatically or uncheck to launch manually;
4. Select your response delay;
5. If you choose to select a follow-up campaign to send automatically to non-openers; and
6. Launch your campaign.

Follow-up campaigns

☑ Automatically resend this campaign to non-openers

Launch manually
1 Day
2 Days
3 Days
4 Days
5 Days
1 Week
Schedule

t line

existing subject line will be used. In the case of a split test campaign, the winning variant's

3 Days ▼

Time to wait after this campaign is launched before resending. If **Launch manually** is selected, then the resend campaign will be created but not launched.
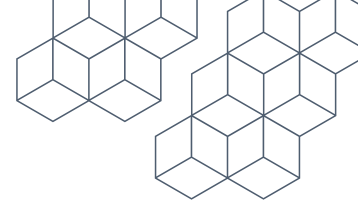
LAUNCH CAMPAIGN

Percentage of list contacts to receive split test variants (required)

10 Minutes
20 Minutes
30 Minutes
1 Hour
2 Hours
4 Hours
8 Hours
10 Hours
12 Hours
14 Hours
16 Hours
18 Hours
20 Hours
22 Hours
1 Day

50

ts   Estimated final list
102

riant)

he best performing variant

performing variant automatically

included in the split test.

30 Minutes ▼

Time to wait for responses before sending the final version.

Percentage of list contacts to receive split test variants   (required)

50

Estimated test contacts   **Estimated final list**

102   102

(51 contacts per variant)

Criteria to determine best performing variant

Opens ▼

Opens
Clicks
Clicks of Opens (CTOR)
Conversions
Total Conversion Value

variant automatically

e split test.

30 Minutes ▼

Time to wait for responses before sending the final version.

Opens: number of times an email has been opened. Note Criteria performance is calculated as a percentage(%) calculated against total number of delivered launches

Clicks: number of times an email has been clicked (links/images etc.). Criteria performance is calculated as a percentage(%) against total number of delivered launches

Clicks of opens: number of times someone opened and also clicked. Criteria performance is calculated as a percentage(%) of clicks against total number of opens

✏️ Testing & Launching
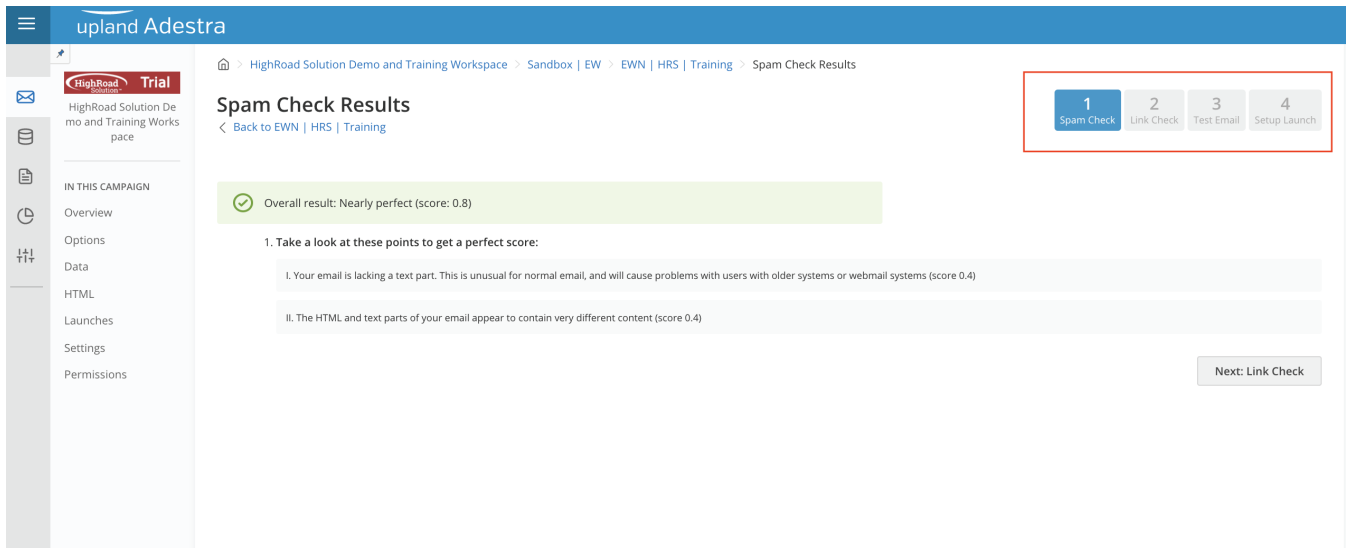
Step 1: Spam check. Here you will get an itemized list of potential red flags that are being picked up in your email that potentially could be picked up by spam filters.

Step 2: Checking links in your email. Anything with a green checkmark is good to go. Anything with an exclamation means the link is either slow to load or is broken. (Note: Many instances the social sites will be picked up with an exclamation, but the links are good.)

Step 3: Sending test this step you can choose to send just yourself a test, choose from the drop down to send to a group of emails to test, or send to   another user entirely.

Step 4: Launch. Launching your campaign is the last step in your process. There are two options for launch.

      a.   Now which will launch your campaign immediately

      b.   You can also choose to send automatically to non-openers

A|B Split Reporting

Reporting Tabs & Definitions:

Navigate to reporting in one of two ways: by clicking the reporting icon from the left main navigation and drilling down into your specific email or navigate to your email campaign and click to show launch reports for that email from the right panel. Adestra offers several ways to review your email performance and below are details of what you will see from each tab:

Links

It's always a best practice to give your links a label when editing in the email, this way you'll see each link listed out on the links tab to show what garnered the most clicks.

Inbound

Emails that fail to make it into the inbox or email deliverability will be reported on the Inbound tab in your campaign report.

Conversions

When you have conversion tracker set up and you've been sending emails, you'll see your conversion data for that specific email on this tab. For more details on conversion tracker reporting, see the Conversion Tracker Guide in Roadwork.

Social

If your email was shared on a social media channel, you will have a dashboard of analytics to show sharing on social media.

t.

Timeline

A timeline gives you a snapshot of your email performance in relation to hours or days.

Heatmap

Reviewing the heatmap of email openers reveals where readers are most engaged with your content.

Email Clients

Reviewing the most commonly used email clients in your audiences can inform how you design and even segment your emails. This tab will break down the mobile vs. desktop readership as well.

Geo Tracking

It's also helpful to understand where your readers are opening your emails in relation to a map.

Saved Reports

A saved report gives you the option to create a snapshot of an email send in a sharable link for anyone that doesn't regularly log into the platform, but would like to review email metrics.
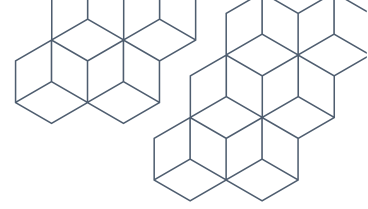
More resources:

- **Adestra Roadwork**
- **Client Care Support Documentation**
- Client Care:

  Available: Monday – Friday 7:30 am – 6:00 pm ET

  Email: **support@highroadsoltuion.com**

  Phone: 703-297-8886