

THE COMPLETE GUIDE TO EMAIL MARKETING

Using the Basic Template Editor

Swiftpage 

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Introducing Swiftpage

Reaching your contacts is vital to successful marketing. Swiftpage's email marketing service offers a variety of powerful and useful tools in a self service web-based environment.

Deliverability

One of the biggest benefits of using an Email Service Provider is the [increased deliverability](#) of your emails. By sending through Swiftpage's servers, the likelihood of your emails hitting inboxes is greatly increased. This is a result of two things Swiftpage does that you cannot. First, we maintain strong relationships with Internet Service Providers (ISPs). Swiftpage regulates CAN SPAM compliancy and best practices among our customers to maintain a strong reputation among ISPs and help ensure that your messages sent through Swiftpage are delivered. Second, we offer easy methods to authenticate your email to create a stronger link between your company's IP address and ours. Authenticate your emails sent through Swiftpage by creating a [SPF Record](#).

Reporting and Analytics

Another benefit of using Swiftpage to send your emails is the reporting data and analytics we provide you after your email has been sent. This data can show you exactly who opened and clicked on your message and when. Your bounce data, or recipients whose servers rejected your email send, is also provided. Bounce data can help you maintain a quality database by updating email addresses that may be invalid or incorrectly entered. The data provided by Swiftpage can then help you identify who is most interested in your message and prioritize your follow-up with the Swiftpage Call List.

Email Template Creation

Swiftpage allows for easy HTML email template creation making your email blasts more professional looking than ever before. With link insertion capabilities you can link to documents hosted by our system, Landing Pages created and hosted in Swiftpage as well as outside web pages. Swiftpage provides Basic and Advanced template editor options for the new or experienced HTML user.

Manage Your Contacts

Swiftpage provides list management storage features so you can access your contacts and fulfill your e-marketing from wherever you are. Simply import a CSV file of your list and create segmented lists with static and dynamic group options in the List Manager. Your contact's e-marketing history and notes are also stored in the Swiftpage List Manger. You can also implement personalization in your email templates with Mail Merge field options inside the text editors.

CAN SPAM Compliance

Swiftpage creates email footers for each of your emails and inserts your physical address and 'Leave this List' option in order to comply with mass email CAN SPAM regulations. Swiftpage also manages your recipients that click the 'Leave this List' link. These unsubscribed email addresses are excluded from future sends without any required intervention from you. Since Swiftpage is a permission-based email provider, we also help you stay CAN SPAM compliant by educating our customers on best practices for gaining new contacts and how to reach them.

Swiftpage brings the benefits of large-scale email marketing to small businesses in a self-service environment.

1. Your Swiftpage Account

To have success with Email Marketing, first you must sign up for a free Swiftpage account from our website.

- > Visit www.swiftpage.com
- > Click Try Swiftpage Free button
- > Fill out the sign up form to create your account
- > Open the Verify Your Swiftpage Account email and click the link to authenticate your email address
- > Now log in to your account to get started

Obligation Free

Your free trial of Swiftpage requires no credit card or obligation whatsoever. We offer high functionality through your free trial so you have the opportunity to use and reap the benefits of the features offered by Swiftpage. After your 60-day trial period expires you will have the option to purchase the service at the price and functionality level that works for your business. There is no obligation to purchase at the end of the free trial period.

Multiple Users

When you sign up for your Swiftpage Account you create the account and one user within the account. Swiftpage provides the centralized benefits of adding multiple users within one Swiftpage Account. Swiftpage Accounts containing multiple users allows Swiftpage to offer useful sharing and cooperating features between users within the same account. Cooperating features we offer include: Send As another user within your account, Publish templates to other users, Account Level reporting, filter and assign Call Lists to other users, and Send a Drip Marketing campaign as another user. You can add more users to your account after it is created depending on your service level with the Manage Your Account option from your Swiftpage Connect homepage.

Swiftpage Connect Interface

In order to login to Swiftpage Account you will need an internet connection since the services provided are hosted online. Once you login, you will be taken to your Swiftpage Connect homepage, also known as My Swiftpage. Here you have access to Swiftpage Connect's tools.



The Template Editor button launches the Template Manager where you can access:

- All email template creation, editing and distribution functionality
- Global and Local templates as well as the Basic and Advanced Template Editors
- Import templates, publish and distribute templates
- Launch templates as landing pages
- Manage your image and document libraries



The Send Email button allows you to:

- Select recipients
- Choose your email template to send
- Enter your subject line
- Select the sender
- Schedule your send or send your email blast now

Note: Users of Swiftpage’s integrations for Sage ACT!, Sage SalesLogix, and Sage CRM generally do not use this section of Swiftpage Connect because email blasts are sent and contact lists are maintained in each of those programs instead.



The Reports button allows you to:

- View your online reports for email blasts and individual sends
- Including detailed open and click data from your email recipients’ interactions with your email sends
- View any scheduled sends
- Request your opt-out or suppression list
- Generate account-wide reports after providing account level credentials



The List Manager button takes you to Swiftpage Connect’s contact management features.

- Easily create dynamic and static groups with any field and various filter options
- Access E-marketing history, Call List actions and keep notes specific to each contact
- Sync your groups to Drip Marketing campaigns to automate your marketing practices

Note: Users of Swiftpage’s integrations for Sage ACT!, Sage SalesLogix, and Sage CRM generally do not use this section of Swiftpage Connect because contact lists are maintained in each of those programs instead.



Swiftpage Call Lists are ranked lists of your contacts based on how they interacted with your email blast, generated by Swiftpage. These lists can also be filtered and assigned for easy follow up, and you can view and edit Call List actions to keep track of your progress.



With Swiftpage Connect’s Surveys and Web Forms, you can:

- Gather valuable new contacts or become more informed on your contacts
- Have Swiftpage host your survey on a landing page for you
- Embed the code on a site of your choice to create a web form

- Map your respondents' submissions back into fields in Swiftpage Connect List Manager

With our higher service levels, Swiftpage also offers powerful automatic Survey follow up options.

- Set up an Autoresponder email to be sent instantly to your Survey respondents
- Use the Drip Marketing Autoloader to automatically load contacts into a Drip Marketing campaign to receive a series of marketing communications after submitting a Swiftpage Survey



Swiftpage provides automated marketing to the small business with Drip Marketing. Drip Marketing gives you the ability to schedule a sequence of messages that are automatically delivered to your contacts at the right time. Swiftpage Drip Marketing uses intelligent technology to send messages to contacts based on their interactions with previous messages and filtered with data in your Swiftpage Connect database. Swiftpage Connect allows you to sync Drip Marketing campaigns to dynamic groups for powerful automation possibilities.

Account Details

Your account details are displayed on the right side of the screen. Here you can view your Account and User ID, the service level of your account, your Drip Marketing service level and daily send limit. Swiftpage Connect has four different standard service levels and four optional Drip Marketing service levels that can be purchased in addition to the standard service levels. To learn more about Swiftpage pricing visit www.Swiftpage.com/pricing.

Edit User Profile

The Edit User Profile button gives you the ability to change your user's contact information. This includes the company information used in your user's Swiftpage Profile merge fields, the postal address that appears in the footer of your Swiftpage sent emails, your logo, your user password, and your notification settings. From here you can also update your distribution list controls for copying templates to and from other Swiftpage accounts.

Manage Account

The Manage Account button requires the account password and then gives you access to Account level preferences. Within the Account Manager you can change your service level and pay period, reallocate your send limit and user access among users, cancel or suspend your account, and add or delete users in your account.

Upgrade Account

The Upgrade Account button allows you to purchase Swiftpage or change your service level after you supply your account password.

Resource Center

The Resource Center section offers helpful links to Customer Support and the E-marketing Education Center on www.Swiftpage.com. New users of Swiftpage find our Live Demo very valuable. These online webinar demonstrations are also offered as recorded videos so you can view them on demand if our times do not work out well for you.

Support Information

Finally, Support hours and contact information for Swiftpage's complimentary Customer Support department for easy access should you require help while using Swiftpage.

Pricing

Swiftpage Connect starts at just \$14.95 per month! Since Swiftpage is priced with email send capacity per day, rather than per month like most Email Service Providers, you get more for your money when you send your email blasts with Swiftpage. For more information on Swiftpage service levels and to see Drip Marketing service level offerings, visit www.Swiftpage.com/pricing.

	Team \$59.95 per month	Pro \$44.95 per month	Basic \$29.95 per month	Entry \$14.95 per month
Email Email send limit allowed per day	1000 Emails per day	1000 Emails per day	1000 Emails per day	250 Emails per day
Surveys Grow your list, use for events, feedback & more	Advanced	Advanced	Limited	Limited
Template Editor Create professional templates easily				
Multiple Users Ability to have more than one Swiftpage user	2+	1+	1	1
Marketing Results Tab (ACT! users only) Shows interactions with contacts				
Content Distribution Collaborate and share templates with users				
Scheduled Send Create your email & send at a later date and time				
Send As Emails sent on behalf of other Swiftpage users				
Swiftpage Call List Hotlist for your Sales Team to follow up on				
Call List Assignments Assign to sales team members to close deals				

Now that you understand your Swiftpage account and the functionality you have access to, it's time to send your first email!

2. Import Your List

One of the most important things to consider when using E-marketing is how you obtained your list of contacts. According to Federal law and Swiftpage policies you should only be emailing people who have volunteered to receive your communications. You have permission if your contact filled in a survey on your website, signed your guestbook, or gave you their business card. Acquiring third party lists of potential leads does not give you permission to email. This does not mean your list is useless. You will just need to obtain permission before sending them your email blast.

Collecting New Contacts

The most effective way to gather new email addresses, or obtain permission from leads you purchased is to offer something that your potential customers will find valuable in exchange for their contact information.

You could offer:

- Hints and tips or other strategic documents
- Free trial or sample of your product
- Webinar or other training
- Entry into a Grand Prize drawing

Offer them this valuable item by sending them a postcard leading them to a landing page or simply advertise the offer on your website and require they fill in their email address in exchange for the free offer. Then you can contact them about promotional offers for your product or service at the email address they provided.

List Manager

The first step to sending your email is selecting who you will be sending to.

To do this, you will need to import your contacts into the Swiftpage List Manager.

- > Click on the List Manager button
- > Click on the List button at the top to import your list of email contacts
- > You will then want to select Browse to select your CSV file of contact names off of your computer
- > Once you have selected your file, click Submit
- > Now map the fields in your contact list with Swiftpage's field names
- > After mapping, click Submit and your list will be uploaded

Import List

Your data fields must be mapped to List Manager fields.

Field Map:
Save Map as:

Original Column Name	Swiftpage Contact List Column
FIRST NAME	First Name <input type="button" value="v"/>
Last Name	Last Name <input type="button" value="v"/>
Company	Company <input type="button" value="v"/>
Email Address	Email Address <input type="button" value="v"/>
Phone	Phone <input type="button" value="v"/>
Address 1	Address 1 <input type="button" value="v"/>
Address 2	Address 2 <input type="button" value="v"/>
City	City <input type="button" value="v"/>
State	State <input type="button" value="v"/>
Zip	ZIP Code <input type="button" value="v"/>

Segmenting Your List

Segmenting your list of contacts based on your contact’s preferences and characteristics is vital to successful email marketing. You want to be sure not to overwhelm all of your contacts with all of your email blasts or they will likely unsubscribe or ignore them. Segmentation will help your reporting statistics as well because your contacts are more likely to open and click on emails that they are interested in, and they will begin to trust that emails from you are worth opening. For example you will not want to email a loyal customer with a new customer promotional email because this messaging does not apply to them; likewise you will not want to email a customer in Wisconsin about your sale at your Denver, Colorado location.

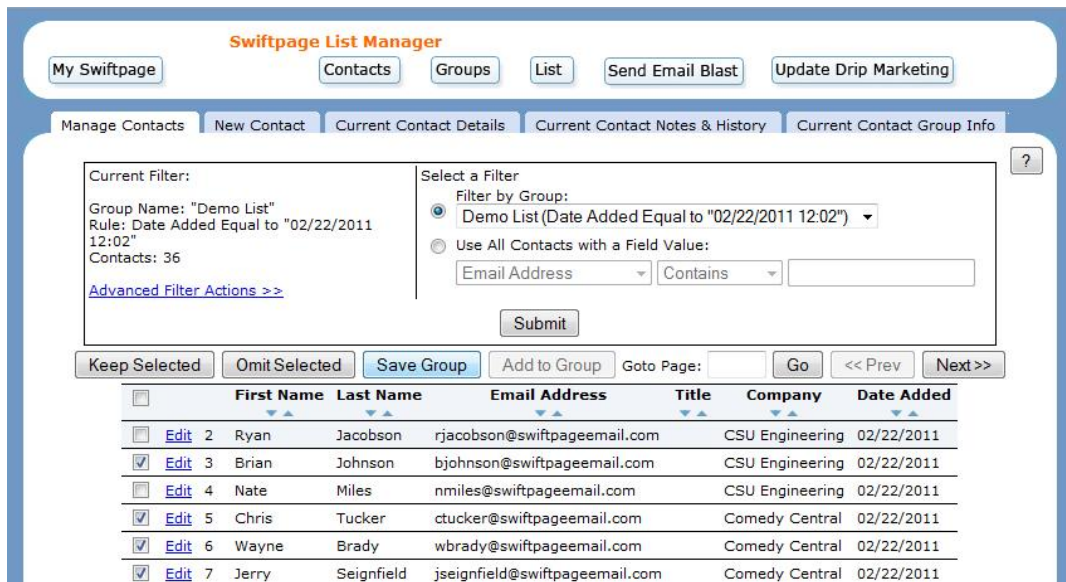
The Swiftpage List Manager gives you the ability segment your list into static or dynamic groups. To create new groups you will need to decide how you want to filter your contacts to create your group.

Static Group

You can create groups manually from the **Manage Contacts** tab using the check boxes to the left of each contact.

- > To select the contact and include in your group, check the box to the left of that contact
- > Once you have selected your contacts click **Keep Selected** and **Save Group**

This group will only change if you manually add or remove a contact so it is considered a static group.



Dynamic Group

You can also filter your entire list by a field to create your group.

- > At the top of the **Manage Contacts** tab toggle the **Use All Contacts with a Field Value** button
- > Select which field you would like to sort a group by
- > Once the list has been filtered to your liking, click **Save Group**

A dynamic group is created from filtering fields in the List Manager. If a contact's field used to filter your group changes, your contact will automatically be added or removed from the group depending on their qualifications to the group filters.

The screenshot shows the Swiftpage List Manager interface. At the top, there are navigation buttons: "My Swiftpage", "Contacts", "Groups", "List", "Send Email Blast", and "Update Drip Marketing". Below this is a sub-navigation bar with "Manage Contacts", "New Contact", "Current Contact Details", "Current Contact Notes & History", and "Current Contact Group Info".

The main area is divided into two sections. On the left, under "Current Filter:", it shows "Group Name: 'Demo List'", "Rule: Date Added Equal to '02/22/2011 12:02'", and "Contacts: 36". There is a link for "Advanced Filter Actions >>".

On the right, under "Select a Filter:", there are options to "Filter by Group:" (set to "All") and "Use All Contacts with a Field Value:". The "Field Value" dropdown is set to "Email Address" and the operator is "Contains". A list of fields is shown, including "Email Address", "First Name", "Last Name", "Title", "Company", "Address 1", "Address 2", "Address 3", "City", "State", "Country", "ZIP Code", "Phone", "Fax", "Web Site", "Category", "Salutation", "SourceGUID", "Opt-Out", and "Assigned for Send As".

Below the filter configuration, there are buttons: "Keep Selected", "Omit Selected", and "Save Group".

The bottom section displays a table of contacts with columns for "First Name", "Last Name", "Title", "Company", and "Date Added". Each row has an "Edit" link and a checkbox.

	First Name	Last Name	Title	Company	Date Added
<input type="checkbox"/>	2 Ryan	Jacobson			
<input type="checkbox"/>	3 Brian	Johnson		CSU Engineering	02/22/2011
<input type="checkbox"/>	4 Nate	Miles		CSU Engineering	02/22/2011
<input type="checkbox"/>	5 Chris	Tucker		Comedy Central	02/22/2011
<input type="checkbox"/>	6 Wayne	Brady		Comedy Central	02/22/2011
<input type="checkbox"/>	7 Jerry	Seignfield		Comedy Central	02/22/2011
<input type="checkbox"/>	8 Chris	Farley		Comedy Central	02/22/2011
<input type="checkbox"/>	9 Chris	Smith		Sharpie Inc.	02/22/2011
<input type="checkbox"/>	10 Jason	Word		Sharpie Inc.	02/22/2011
<input type="checkbox"/>	11 Nick	Harding		Sharpie Inc.	02/22/2011
<input type="checkbox"/>	12 Allison	Sweet		Voicecom	02/22/2011

When your list is ready in Swiftpage Connect, it's time to build your email template.

3. Create Your Email

Swiftpage Connect offers powerful options for how to create and edit your email template. We offer a large library of **Global Templates** from which you select a template to start with and customize it to your liking. In order to edit these templates they must be copied to the **Local Library**. All templates you have previously edited are available in your Local template library.

Template Editors

All templates within the template manager are defined by their editing capabilities. The three editing types are Read-only, Basic or Advanced.

Read-only templates cannot be edited. These are useful for managing and controlling branding within a company with multiple Swiftpage users. Read-only email templates can be created and distributed to other Swiftpage users to send without allowing any alterations to be made to the template.

Basic templates are edited with the Basic Editor. The Basic Editor requires no technical knowledge of HTML. The Basic Editor is Swiftpage's email building program that empowers the user to insert text and images, section by section, without accessing any HTML code directly.

Advanced templates are edited with the Advanced Editor. The Advanced Editor requires more knowledge and experience with HTML. The Advanced Editor is an HTML designer that offers full WYSIWYG (What You See Is What You Get) functionality for more flexibility with your template layout. This editor also gives the user direct access to the HTML code within the template. Since this editor allows for more flexibility and accessibility to the template's HTML code, users that are unfamiliar with HTML are not recommended to use this editor as then can cause damage to their template.

If you have created an email template using HTML coding software such as Microsoft FrontPage or Adobe Dreamweaver, you can use the **Import Template** tool to import, edit and send your template with Swiftpage. The import feature will walk you through importing the .htm file and all images referenced therein. Once you have imported your template you can then edit it with the Advanced Editor. The import process and Advanced editor functionality are not covered in detail in this Basic Template Guide.

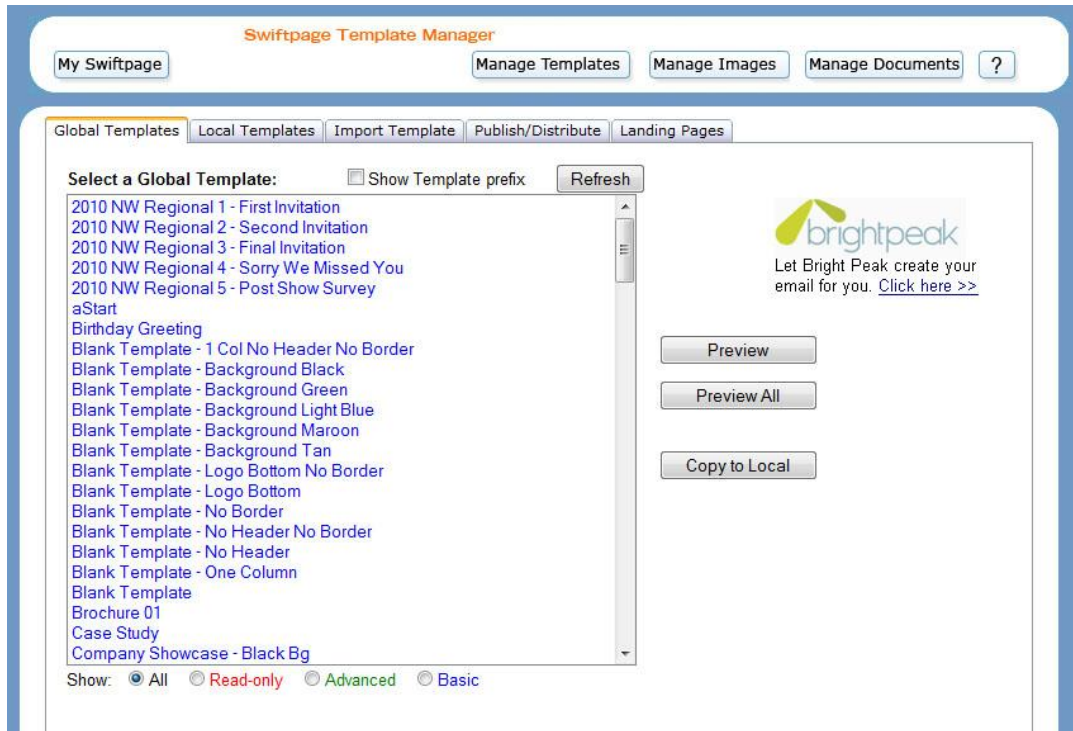
Creative Services

If you would like a customized template created specifically for your business, contact Bright Peak, the creative services division of Swiftpage. Bright Peak can design and build a template customized for your company and place it in your Swiftpage account. Bright Peak's unique skills offer template creation for either the Basic or Advanced editor so you can adjust and reuse them as needed. They offer a wide variety of affordable creative services as well so you can have them do as much or as little as you need. And you will not believe how quickly your designs are completed. Visit www.Brightpeak.com for more information.

Selecting a Template

In this guide we will be explaining the use of the Basic Editor so you will need to select a Basic template from the Global Templates to start from.

- > Select the **Template Editor** button from your Swiftpage Connect homepage
- > Click the **Global Templates** tab



From here you can Preview All templates to view the templates and determine which template you wish to customize for your business.

When selecting the template you would like to start from, keep in mind the **background color**, or the color shown behind the template itself as seen below. Also notice the **border**, or the line around the entire template, because these design attributes cannot be customized within the editor.

Once you have chosen your Basic template to start from,

- > Select it within Global Templates
- > Click Copy to Local
- > Rename it
- > Click Copy
- > And select Edit Template



The Basic Editor

Content Editor

Customize Template

When you first enter the Swiftpage Basic editor, you will see two tabs on the left hand side of the screen, **Content Editor** and **Customize Template**. You will primarily use the Content Editor tab when editing your template's images and text. The Customize Template tab is used to:

- Structure your template, including adjusting column widths
- Change colors within the template
- Add windows and more

After making edits you will want to click the **Refresh Template** button within these tabs to view the current version of your template. The following sections explain the functions of both of these tabs.

Moving your mouse over your template within the Basic Editor, you will notice the image across the top of the email, known as the **header image**, as well as colored outlines around sections in the body of the template. These sections are called **SwiftWindows**. Each SwiftWindow can contain one image and unlimited text; they organize the content of your email. Each of the content editing options requires that you first select one of the windows in your template by clicking on it. When you scroll over windows in your template, a green border appears around them. To select a SwiftWindow click on it and the border will turn solid blue.

Hovered over SwiftWindow



Selected SwiftWindow



Uploading Images

Now it's time to start editing your template. First, you will want to change the **header image** to relate to your unique company. You can either select a header provided in the Swiftpage Image Library or Upload a Header image off of your computer. We recommend you upload your own unique header since this image is the first imagery your company will convey to recipients once your email is opened and therefore should be specific to your company, industry and brand.

When uploading your own header there are a few tips to keep in mind:

- You should maintain a 600 pixel width for the best image quality
- A 200 pixels or less is recommended, you want your recipients to be able to view some of the body of your email should they preview your template

- Web graphics like this should be 72 dpi, or dots per inch
- A .jpg file types work best for email images in Swiftpage

If you do not have a header image to upload or a way of creating one, Bright Peak creative solutions from Swiftpage can create one unique to your business that you can use in all of your email templates. For more information on creative services visit www.BrightPeak.com.

To upload a header

- > Click Image Options
- > Replace Header Image
- > Upload Header and
- > Browse your computer to select the image you have created for this email
- > Click submit

Now we can begin to edit the body of the email.

- > Start by selecting a SwiftWindow to insert an image into
- > Click the Content Editor tab
- > Image Options
- > Add/Replace an Image
- > Select the file to upload by browsing your computer
- > Choose where in the SwiftWindow you want to position the image: left, right, top or bottom
- > and click Submit

Other Image Options:

- > Change the position of the image by selecting the SwiftWindow and clicking Change Position
- > Resize the image by selecting the SwiftWindow and then clicking Change Width
 - To avoid blurry images from multiple changes, we recommend changing your image size outside of the editor with a free program such as [Sumo Paint](#) or [Pic Resize](#) (no affiliation to Swiftpage) and importing it as the image you wish to have inside your template
- > Remove images in the selected SwiftWindow by clicking Remove Image

As you upload images into your email template it is important to consider a few best practices.

- Imagine what your email will look like if your email recipient blocks images because images are blocked as a default in many email providers including Microsoft Outlook. Will your email still make sense?
- Consider the objective of your email and include images that act as a button calling the recipient to take immediate action
- Consider your recipients' first impressions; how does your email look in a common preview screen (like Microsoft Outlook) and what can your recipient see without scrolling down?

Inserting Text

Text, also known as copy, within your email template is the meat and bones of your communication. When creating content for your email consider your objective and be sure you have a **call to action** included that specifically tells your recipient what you want them to do.

- Your call to action or CTA should be in the form of text links as well as images
- A button CTA is a great way to draw your recipient's attention and drive them to click the link for immediate action
- Typically, you have less than 3 seconds to grab the attention of your reader, so your headlines should read like those you would see in a newspaper
- Use size and color that will attract your readers' attention and drive them to action

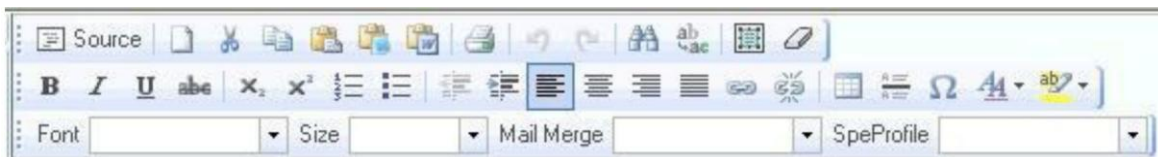
It is also important to consider your recipient's perspective when determining **content**, and be sure your text is relevant and valuable to them.

- Your email should be at least 80% content and no more than 20% sales talk
- Do not go overboard with too much content and overwhelm your recipient
- Link the text in your email to a landing page, website or PDF to expand on your content

To edit the text in your template:

- > Select the SwiftWindow whose text you want to edit
- > Content Editor tab
- > Text Options
- > Edit Text

The toolbar across the top of the screen is similar to what you would see in your standard word processing program.



Personalizing your email can also help to engage your recipient. Make use of our **Mail Merge** options to pull contact specific fields from your List Manager and make your contacts feel like each email you send them was created specifically for them. With Swiftpage you can select your mail merge fields easily within the text editor drop down menu.



If you have written your content in Microsoft Word and wish to copy it into your template, be sure to use the **Copy from Word** feature within the text editor. Microsoft Word and other word processing programs can inadvertently add tags that can disrupt the layout of your text in HTML.

Once you are finished inserting text in this SwiftWindow select Submit to view newly inserted text in your template.

Adding Links

Your call to action drives your recipients to take further action, like clicking a link to a website or landing page. After you send your email blast your contact's interaction with your email will be available to you. This can be highly valuable information as only your most interested recipients are interacting to this degree with your template. Consider what you will do with your open and click information and create your links with list segmentation and identifying your recipients' preferences in mind.

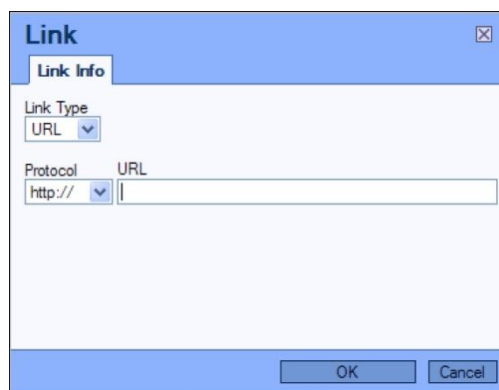
When linking images and text you will want to consider the **placement** of your links. Be sure to have links above and below the fold. This means that you should have at least one image and one text link visible to your recipient immediately when they view your email without scrolling down. This placement is termed above the fold. You should also be sure to have at least one image and one text link visible if your recipient scrolls to the bottom of your message. This placement is termed below the fold.

To **link from an image** first select the SwiftWindow containing the image you would like to link.

- > Click Content Editor tab
- > Image Options
- > Click Link to Survey/Web
- > Select Link to Web Address
- > Enter the URL address you want to link to and click submit

Swiftpage Connect allows you to create **text links** to a web page URL, or to create an email. When creating text links remember that some recipients will have their incoming email images blocked, so you should have identical text links to each image link.

- > To link from text, first select the SwiftWindow where you would like to put the text link
- > Click the Content Editor tab
- > Text Options
- > Edit Text
- > Type in the text you would like to create a link from, it is helpful to use action words and arrows when creating text links to help draw your recipient to immediate-click action
- > Highlight the text to link and select the Insert Link button in the tool bar at the top



- > Enter the URL address you want to link to
- > Click ok
- > Click submit at the bottom of your text edit window

You should always test your links after creating them. To do this, simply click on the image or linked text in your template and a new window will pop up showing the linked website.

Linking to a Document

Since many emails with attachments will be blocked by Spam filters, Swiftpage allows you to link from your email to a PDF document stored on Swiftpage servers. One PDF document can be linked in each SwiftWindow.

To **Link to a PDF**, first you will need to upload it to the Swiftpage servers. You can do this by

- > Selecting the SwiftWindow you will want to link your PDF to
- > Then Click the Content Editor tab
- > PDF Options
- > Upload a PDF
- > You can then browse your computer for the document and select it
- > Click submit

Now you can link images and/or text to your PDF document.

- > First Select the SwiftWindow
- > then click Content Editor tab
- > PDF Options
- > Either Link to image or Link to Text

If you click **Link to image** you will link the uploaded PDF to the image in that SwiftWindow once you click submit.

If you select **Link to Text**, you will need to have already typed the text you want to link your PDF to by editing the text in that window. Retype the text you want to link to in the box provided and click submit.

As with any links, you should test your links to PDF documents to make sure they are functioning properly and you uploaded the correct document before sending your email.

Customizing Your Template

Want to make your email template a little more unique? You can do this by making use of the **Customize Template** Tab. Here you have the options to set the column widths, change background colors, add horizontal lines, add or delete windows, move windows, and lock or unlock windows.

Column Width

If the original template you selected does not have the exact column widths you wish to have in your template, you can adjust the width of your columns by selecting the **Set Column Width** option. Here you can enter a pixel size ranging from a minimum of 8 pixels to a maximum of 580 pixels. This size relates to the column on the left side of your template. The right column automatically adjusts to compensate for the left column's change so they both cover the 580 pixel total width of your template.

Background Colors

A great way to customize your template is with colors. By selecting the **Background Colors** option you can select any color to fill the background of a SwiftWindow, Column, or the entire template. You can do this by:

- > Clicking the color in the color chart
- > Or enter the numerical values of Red, Green and Blue in the boxes, if you do not know the values you can use a free program like [instant eyedropper](#) (no affiliation with Swiftpage) to identify the color values you need.
- > Click See Color to view the color in the preview area
- > Select the background area to color from the drop menu, and press submit to select

Horizontal Lines

If you are including a lot of text or images, you can insert **horizontal lines** in your template to keep it from looking cluttered:

- > Select the SwiftWindow below where you would like to place your horizontal line
- > Click Horizontal Lines
- > Select Add Line Above
- > Remove horizontal lines by selecting Remove Line Above

Adding and Deleting SwiftWindows

Since each SwiftWindow can contain one image you may need to **add, duplicate or delete SwiftWindows** by using the Add/Delete option. To add a window:

- > Select the SwiftWindow above where you would like to add a new SwiftWindow
- > Click Add Window Below
- > To duplicate the selected SwiftWindow, select Duplicate Window

To delete a window, first be sure you want to delete the window. Please note, unless you have saved a copy of your template you will not be able to recover a SwiftWindow once it has been deleted.

- > Select SwiftWindow to delete
- > Click delete window and submit to confirm

You cannot delete the top most SwiftWindow in any column. You must first move the SwiftWindow down and then you can delete it.

Moving SwiftWindows

When using the same template for multiple email sends you may also need to **move SwiftWindows**. To do this:

- > Select the SwiftWindow you want to move
- > Click move window
- > Choose the number of positions to move the window and whether to move it up or down

You cannot move windows right or left because of the possible width differential between columns in your template.

Locking SwiftWindows

Should you want to protect your work, you also have the option to **lock and unlock SwiftWindows** to ensure they are not changed. You can do this by:

- > Selecting the window and clicking Lock/Unlock Window
- > Lock Window

Once your email is built to your liking you are ready to send!

4. Send Your Email

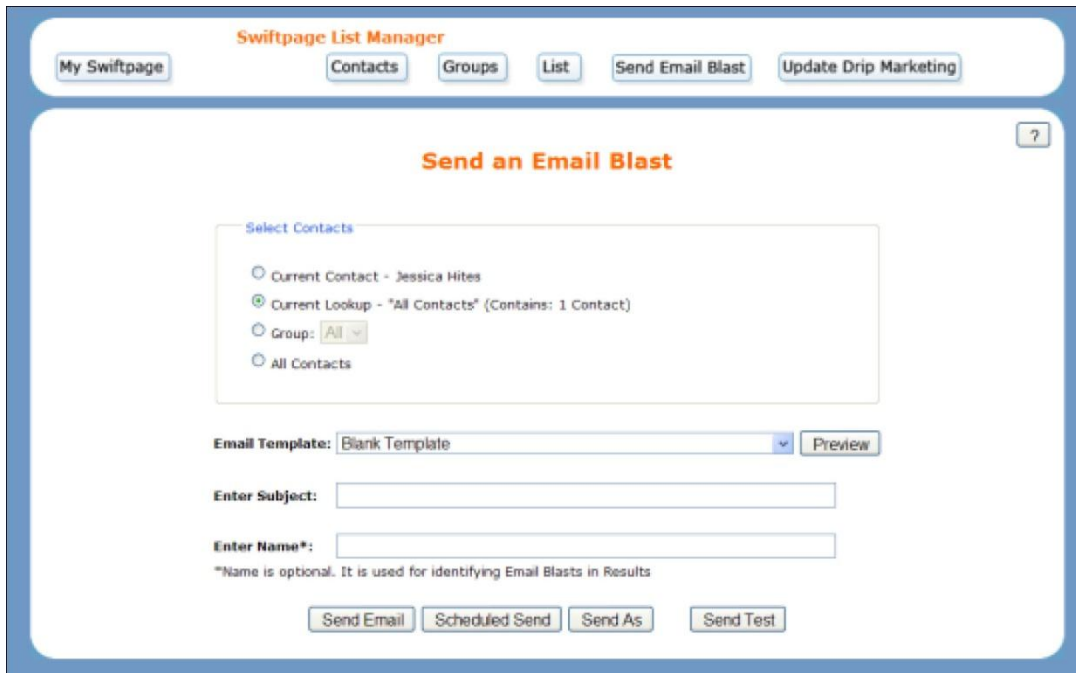
There are a few steps to sending your email blast. You will need to select the contacts you want to send this email to, write your subject line, test your email send, and determine when to send your email and who to send it as. There is plenty of strategy behind all of these options so we will go over the best practices we have found for each.

Selecting Contacts

First you will want to select who to send your email blast to. Email marketing best practices tell us that list segmentation leads to stronger email relationships with contacts. Honor your contact's preferences and they will be much more likely to engage with your email and trust your communications and your company.

When you are ready to send your email blast:

- > Click on Send Email button
- > Select your contacts, Current Contact, Current lookup, Group, or All Contacts
- > Select Send Email Blast button from the toolbar to access the send options.



The screenshot shows the 'Send an Email Blast' interface in the Swiftpage List Manager. At the top, there is a navigation bar with buttons for 'My Swiftpage', 'Contacts', 'Groups', 'List', 'Send Email Blast', and 'Update Drip Marketing'. The main content area is titled 'Send an Email Blast' and contains a 'Select Contacts' section with four radio button options: 'Current Contact - Jessica Hites', 'Current Lookup - "All Contacts" (Contains: 1 Contact)', 'Group: All', and 'All Contacts'. Below this is an 'Email Template' dropdown menu set to 'Blank Template' with a 'Preview' button. There are also input fields for 'Enter Subject:' and 'Enter Name*:', with a note that the name is optional. At the bottom, there are four buttons: 'Send Email', 'Scheduled Send', 'Send As', and 'Send Test'.

- > Select your Contacts, Current Contact, Current Look Up, Group, or All
- > Select the email template that you would like to send out from the drop down menu
- > To preview the email and ensure you selected the correct one, click the Preview button on the right

Writing Your Subject Line

Now that you have selecting who you are sending to and what template you will be sending, it's time to create your subject line. This is one of the most vital parts of your email message because it's the first impression of your email to your recipient and a major opportunity to convince your recipient to open your email to learn more. Subject lines are also a trigger for Spam filtering so there are a few things you can do to avoid your email getting blocked due to its subject line.

Here are a few tips you should consider when creating your email's subject line:

- Use your company or product name in your subject line so your contact can easily recognize your email
- Make sure your subject line relates to the content of your message, unrelated subject lines tend to trigger Spam filters and are often blocked
- Your subject line should be less than 45 characters
- Make it catchy so the recipient wants to open your email to read more

When writing your subject line reference your own inbox and determine what will make your contacts want to open your message and what definitely will not. Identify common practices and buzz words used in Spam subject lines to know what to avoid, such as:

- All caps
- Numbers and any special characters
- Prescription references
- Using the word 'free'

Test Effectiveness

Once you have created a great first impression for your email, it is very beneficial to do some testing. Send your email to yourself and a friend or coworker to determine how effective your messaging is. You may not feel the need to test the effectiveness of every email message, but it's a great way to turn E-marketing beginners into experts in no time.

To do this, create email addresses in free email providers such as Gmail, Hotmail, Yahoo or other programs that your contacts may use. Then send your message to yourself at all of your email addresses, and a few friends or colleagues whose opinions you trust or who have preferences that may relate to those of your email audience.

Notice how your email looks in different browsers,

- Are your links still visible above and below the fold?
- How does it look with images blocked?
- How would you interact with your email and what draws your attention?
- Does your call to action serve its purpose?
- Do you get your intended message across?

Also have your test recipients give you as much feedback as possible.

- What do they remember from the email?
- What did they find the most interesting or exciting?
- What did they click?

Use the information you have collected to edit your email to make it more effective. Perhaps your links need to be moved or your headlines or subject line should be changed.

Now that you have tweaked your template to improve its effectiveness, do a **Spam check** to determine how your message scores according to our Spam Checker. Visit www.swiftpage.com/Deliverability/Spamcheck.htm and follow the instructions to receive your Spam Check score.

Smart Sending

There are three sending options available with Swiftpage. You can send your email now, schedule to send your email at a later date, or send your email as another Swiftpage User.

Send Now

First, we will show you how to send your email blast now. Read on to learn about Scheduled Send and Send As features. Before sending your email, be sure to review all of the information in the Send an Email Blast window, such as your selected contacts, template, and subject line.

When you are ready to send your message,

- > Click the Send Email button
- > You will then view a prompt to confirm your email details
- > You can create a tag to help reference your email in your reports, or leave it blank
- > Select Yes and a confirmation window will confirm your email blast has been sent

Schedule Send

If you want to schedule to send your email at a later date, after preparing your email to be sent, select the Schedule Send option in the Send an Email Blast window.

- > Select a specific calendar date up to 60 days from now to send your email
- > Click Schedule Send
- > Now the send review window will pop-up allowing you to review your email information
- > You can tag your email blast for reporting purposes

Select the Date and Time for Send

You may schedule an email campaign for up to 60 days in advance. Click on the appropriate date and select the time to send this email.

March 2011						April 2011						May 2011					
Sun	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu
	1	2	3	4	5						1	2	1	2	3	4	5
7	8	9	10	11	12	3	4	5	6	7	8	9	8	9	10	11	12
4	15	16	17	18	19	10	11	12	13	14	15	16	15	16	17	18	19
1	22	23	24	25	26	17	18	19	20	21	22	23	22	23	24	25	26
8	29	30	31			24	25	26	27	28	29	30	29	30	31		

DATE

TIME 4 AM

Submit Cancel

You have now scheduled your email blast to be automatically sent at a later date without any further intervention necessary from you. You can confirm your schedule send status in Swiftpage Reports under Scheduled Email.

Send As

Another highly valuable sending feature is Send As. Send As allows you to create your email blast in its entirety and then select a different Swiftpage user as the sender. Please note that Send As requires Team service level.

This is very useful for email blasts to help your team specialize in what they do best. Allow your marketing team to create a well branded, effectively worded email, and have it appear to be sent from someone at your company your contact will recognize: a specific salesperson, the CEO or any other listed user in your Swiftpage account.

Once you have prepared your email to be sent, you can select the Send As option at the bottom of the Send an Email Blast window.

Choose from the sender options:

- > Select from other Users of your Swiftpage account, with all options listed in your drop down menu or
- > Select the list field Assigned for Send As

Send As

Choose Sender

Swiftpage User

List Field

The Account Password must be provided for Send As

Account Password:

The **Assigned for Send As** field in the Swiftpage List Manager is useful because by sending an email blast to many contacts with from various users, the email recipients will think their sales person sent them the email message specifically. This is great for personalizing emails and increasing your open rates because your recipients will recognize the name or email address in the From field when they receive the email. You will want to be sure that all of the record managers for your contacts are also Swiftpage users, or this field will revert back to sending from the current user's email address.

Once you have selected your sender:

- > Enter your account password
- > Send now
- > Or schedule your send as by selecting the date

Review your Send As Summary window, which shows what will be sent and what user will appear as the sender.

- > Click Send Email

Email Blast Confirmation

Sending To: 36 Contacts (Group: Demo List, Date Added Equal to "201102221202")

Send Time: Now

Template: e_z_mastertemplates_e_Thoughtspot Oct 08

Subject: Check Our our New Product

Name: Check Our our New Product

Personal Message:

You have now sent your email from another user or users in your Swiftpage account. You will receive a confirmation email notifying you that your email was sent successfully.

5. Track Your Email

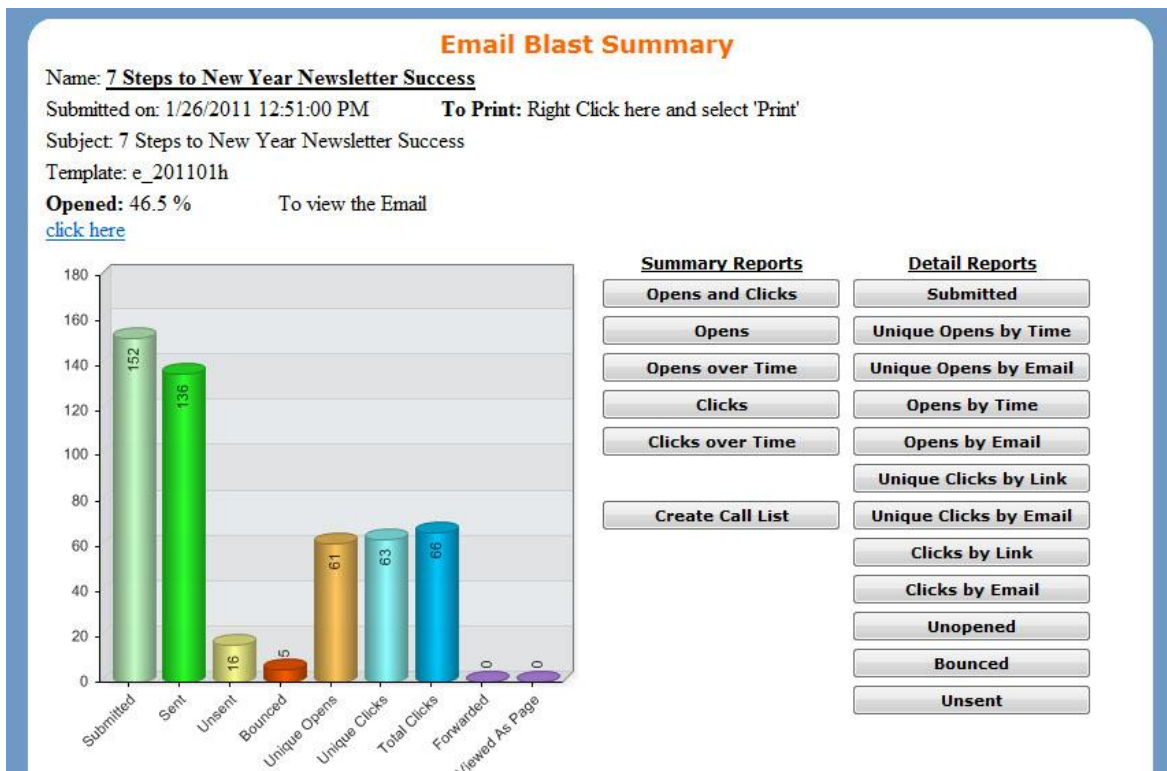
Once your email has been sent, you have access to a wealth of information about the contacts you just emailed. Your email reports provide live data on your contacts' interactions with your message. We recommend waiting at least 24 hours before analyzing your reports to give your recipients an opportunity to open and click.

Reports

When it is time to view your email blast reports, select the Reports button from Swiftpage Connect homepage. You can choose the individual or campaign email that you want to view.

- > Select your time filter
- > Click on the desired email
- > Then click View Report at the bottom of the window

You can now view your Email Blast Summary report. This report provides all of the information available from your email send including the name of your email blast, when it was submitted to send, the subject line, the template that was sent, a graphical representation of your email blast, and summary and detail reports.



The graph shows how many contacts were submitted for the Email blast, how many were sent, unsent, bounced, how many times your email was opened, unique and total clicks, how many times it was forwarded, and viewed as a web page.

Along the right side, details are provided about how the email recipients interacted with the email. These reports give you unique insight into your customers' behaviors and interests. You can click various buttons to view more reports and graphs summarizing or detailing your contacts' interactions with your email blast.

Opens

You will first look at who opened your email blast. Note that an Open is only counted when images are downloaded. Keep in mind that some email clients and mobile devices default to exclude images. Therefore while your email may have been read it will only appear as an open in reports if the images were viewed. You can request to be added to your recipient's whitelist or safe sender list to ensure images automatically appear in emails you send them.

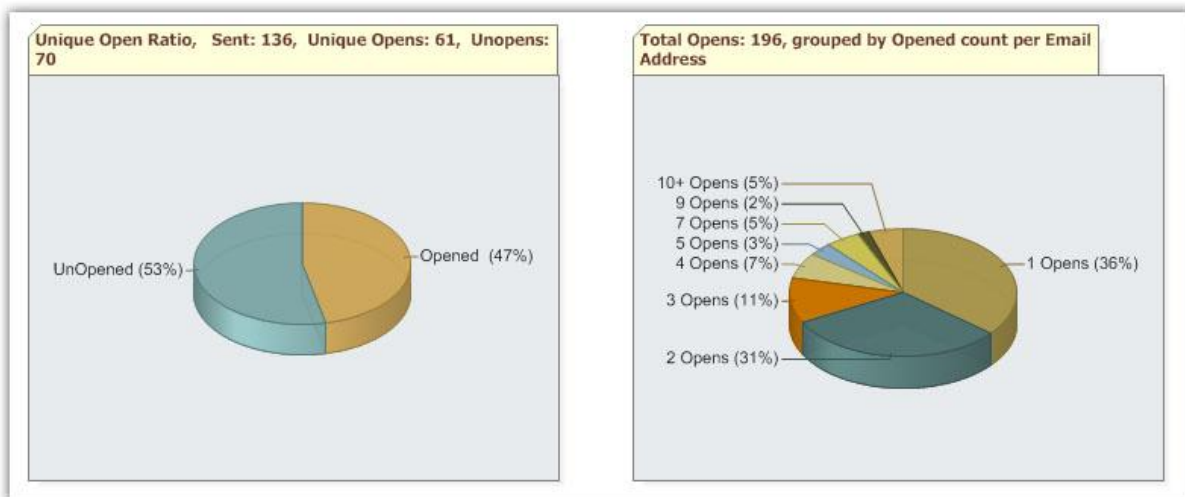
The Opened percentage is displayed just above the bar graph. This is your email blast's **Open Rate**. Your open rate is the number of emails you sent divided by the number that were opened. The industry standard open rate is around 20%, but it depends greatly on your industry and your relationship with your recipients.

Below you will notice a bar in the graph labeled **Unique Opens**. Unique Opens are the number of recipients that have opened your email. Here recipients are only counted once per email blast if they opened it.

For more open information:

- > Select Opens under the Summary Reports heading

You are now viewing pie charts of the number of recipients that opened your email and a breakdown of repeat opens by the same recipient.



Opens over time shows a graphical overview of when your email was opened over time. Only unique opens are shown here. To retrieve more specific data, such as opens by time and email address, select from the buttons below the detailed reports heading.

Clicks

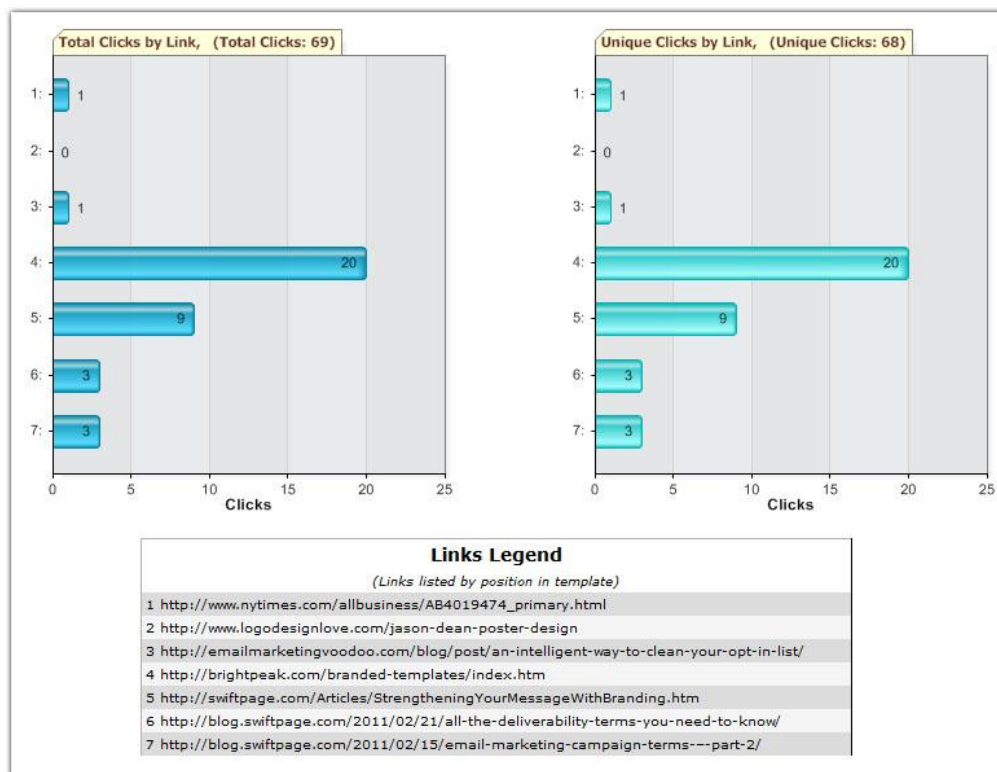
Now let's look at who clicked on the links in your email blast. On the bar graph take a look at the **Unique Clicks** bar. Unique Clicks is the number of links that an individual clicked on. An individual can only count once per link within an email.

The **Total Clicks** bar shows the total number of times any of the links were clicked within any of the emails sent out. Here an individual's clicks on a link will count more than once.

For more detailed Click information:

- > Select Clicks under the Summary Reports heading

You are now viewing bar graphs of the number of recipients that clicked each link within your email.



Clicks over time shows a graphical overview of when your email's links were clicked over time. Only unique clicks are shown here.

To retrieve more specific data, such as clicks by email address or link, select from the buttons below the detailed reports heading.

Other Reporting Terms

You will find it useful to analyze the reports for those who did not open the email. You will want to determine why some recipients did not open your email so you can adjust your follow-up actions and improve your E-marketing success on your next email blast. Data regarding intended recipients that did not open your email blast is separated into three categories: Unopens, Bounced and Unsent.

Bounced shows all of the recipients whose servers rejected or bounced your email. The most common reason for this error is 'User Unknown', or the email address does not exist. To view the bounced email addresses and the reason they were bounced, select the bounced button in the detailed reports.

Unsent represents the number of email addresses that were not sent this email blast. This could be because they are invalid, there was no email address provided with that contact, the email address was duplicated within that email blast, or the contact has opted-out of receiving future emails from you so the email address was suppressed. To view the unsent email addresses and the reason they were unsent select the unsent button in the detailed reports.

To view your **Unopened** report, select the unopened button in the detailed reports. This shows email addresses that have been sent your email blast but have not yet opened it. When he or she opens your email, their name will not appear in this particular report anymore.

Now that you understand what your reports are telling you, it's time to put that data to use.

Utilizing Your Reports

Once you know what your reports are telling you, it's vital to effectively use the data you have gathered. Not every E-marketer will interpret or use their data in the same way, but we have offered some pointers for how you can start to realize the value of your email send data to follow up and plan your next email.

Follow Up

Your email data tells you a lot about your contacts. You should use this data to cater your sales practices to your contacts specific preferences.

First, look at your contacts' detailed interactions with your email to determine who is most interested in your offering. Use this information to decide who to follow up with first.

- Who opened your email repeatedly?
- Who forwarded your email on to a friend?

Next, look at what links your contacts clicked.

- Determine your contacts' preferences within your email
- See what they might be in the market for in the future to help you with suggested selling

Now that you have determined who's most interested, as well as what specifically your contacts are interested in, close some sales!

Planning Your Next Email

One of the most important things an E-marketer can do is reflect on past email performance to adjust and improve future email campaigns. Remember that this is a process of trial and error to determine your contacts' specific tendencies, so change it up and see if your reports fair better or worse after making these changes.

First, we will use the open rate to determine the effectiveness of your email's first impression and timing. Take a look at your **subject line, sent time and date**. Consider adjusting these factors when sending your next email blast to similar contacts to see if you can improve your open rate.

- Are your contacts more likely to read your email if you send it very early in the morning on Wednesday or in the evening on Monday?
- Is their attention captured better by subject lines with your company name in them or information regarding the email content specifically?

Next, you should use the clicks data to determine the effectiveness of your **email template**. First look at the links that were clicked the most,

- How were they placed?
- Was it a linked image or a text link?
- How was your link worded so that it called your contacts to action?
- Analyze your least-clicked links to determine what not to do in the future

You can also use the repeated opens data to determine your contacts' **content** preferences. Change your content between email blasts to see what your contacts are more interested in.

- Quick calls to action with very little text, or in-depth information in the content of your email?

Also establish the effectiveness of your images. Analyze the types of **images** you use in your most successful emails.

- Were they call to action button images or simply stock imagery related to your industry?
- Look at how many images to use and the best placement

Take a look at your unsent email addresses and **clean your database**.

- Is there a misspelling in the email address?
- Is it a duplicate contact?
- If it's an invalid email address, consider calling your contact to maintain their valid email address

Finally, view your unopened reports. Consider alternate methods to get your email's message across to these unreachd contacts.

- Could send them a direct mailing? [Swiftpage.com/directmail](https://www.swiftpage.com/directmail)
- Or consider using our telemarketing service ([Swiftpage.com/telemarketing](https://www.swiftpage.com/telemarketing)) to give them a call to ensure your message is communicated to them

Most importantly, remember opinions and tastes change, so keep up with your email blast results and adjust your emails as need be. It's important to stay up to date on the trends of your contacts in order to reach them effectively.

Glossary

Automated Marketing: Marketing campaigns that release and progress almost without human intervention. See Drip Marketing for a more detailed definition.

Bounce Report: List of recipients whose servers rejected or bounced your email. The most common reason for this error is 'User Unknown', or the email address does not exist. To view the bounced email addresses and the reason they were bounced, select the bounced button in the detailed reports section of Swiftpage Reports.

Call List: Creates a prioritized list based on email interaction. The Swiftpage Call List is a ranked list of the hottest to the mildest contacts based on a score of opens and clicks. Multiple email blasts can be used to create the score.

Call to Action (CTA): What is the objective of your campaign? To introduce a new product, invite people to an event, or announce a promotion. No matter what it is you will most likely need them to take some sort of action. The Call to Action in an email campaign serves this purpose. It is the phrase or enticing graphic, such as a button, that encourages your reader to take action. An example of a call to action is "Click here to receive your 60-day free trial today!"

CAN SPAM Act of 2003: CAN-SPAM is an acronym for Controlling the Assault of Non-Solicited Pornography and Marketing. This Act is a federal law that establishes requirements for those who send commercial email. It determines the penalties for email spammers and gives consumers the right to request to be removed from an email list. CAN SPAM policies to take note of:

- Your email's 'from', 'to' and routing information must be accurate
- The subject line must truthfully represent the content of the message
- An unsubscribe method is required on every email and unsubscribed email addresses must be excluded from future sends
- Commercial email must be identified as an advertisement and include the sender's physical postal address in all emails

CSV File: A CSV File stands for Comma Separating Variable file. CSV is a common file format for tabulated data and is a save as format option from Microsoft Excel.

Deliverability: Deliverability is the overall success of delivering an email to the intended recipient. This depends on many factors including email lists, subject lines, use of images and text, SPAM filters of recipients, links and so on. It is important to always test your email messages to ensure the highest rate of deliverability.

Drip Marketing: Swiftpage Drip Marketing manages the process of delivering on-going communication via email, print and telemarketing over time. Swiftpage Drip Marketing gives you the ability to create a sequence of messages that are automatically delivered to your contacts at the right time. Swiftpage Drip Marketing uses intelligent technology to send messages to some contacts based on their interactions with previous messages and to others based on data in your database environment.

Dynamic Groups: A type of group of contacts based on filtering fields in the Swiftpage List Manager. If a contact's field used to filter your group changes, your contact will automatically be added or removed from the group depending on their qualifications to the group filters.

Email Client: Swiftpage Outlook, Gmail, Yahoo, MSN, AOL are all examples of Email Clients. They are the applications used to send, receive, store and view email.

Email Service Provider (ESP): Swiftpage is an ESP because we provide a service that allows users to send permission-based email campaigns to their contact lists.

Header Image: The header is the top part of the email that reveals anything from the email topic and the logo of the company sending it to an enticing graphic. Because most headers are in an image format, it may not appear in the client's inbox unless images are turned on. Sometimes people choose not to include a header so that it looks more like a plain text email – adding that extra personal touch.

HTML: HTML stands for Hypertext Markup Language. HTML is a type of language that allows you to create web pages and email templates that you can view in a web browser. An HTML email allows you to display images and graphics within your email. This way you have more freedom to make your email message more appealing and eye-catching.

Internet Service Provider (ISP): A company that provides access to the internet. Comcast, MSN, Yahoo, AOL, as well as local cable and telephone companies are common internet service providers.

IP Address: IP stands for Internet Protocol. The IP address is the computer's address from which the emails communications are being sent out – a numerical component of an internet address or domain name. An IP address looks something like this – 123.43.5.564.

Landing Page: The page that appears when a potential customer clicks on an advertisement or a promotional link in an email. The page will usually display sales copy that is a logical extension of the advertisement or link. Swiftpage has a landing page creation feature. A landing page is commonly placed in print pieces as a URL, given out on telemarketing calls and can be linked to from any email.

Mail Merge: Mail Merge fields are generic field names can be inserted into email templates and upon send the data from a specific contact will be inserted where the merge field has been added to create a more personalized experience for each recipient. For example if you include [[First Name]] in your email template, the text you have stored in the First Name field in the List Manager for each contact will replace the merge field upon send.

Permission-based email: In order to be considered a permission-based email, your recipients must have directly agreed or 'opted-in' to receive emails from your company. You have permission if your contact voluntarily provided their information. For example they filled in a survey on your website, signed your guestbook, or gave you their business card.

Purchased List: A list of contacts (by demographic, industry, or any other individual/company characteristics) your purchase from a list provider, such as Hoovers, to gain qualified leads to follow up on. Remember, you cannot send email to these leads until you have gained permission.

SPF Record: SPF stands for Sender Policy Framework. An SPF record allows you to authenticate your email and verify that your message comes from an authorized mail server. SPF records help detect messages coming from spammers who try and falsify senders' IP addresses in the email header. Swiftpage has an SPF record tool that you can use to verify your email campaigns. <http://swiftpage.com/deliverability/index.htm>

Static Groups: A type of group of contacts you can create within the Swiftpage List Manager. Once this group has been created you can only add or remove contacts manually so it is considered a static group.

Suppression List: The suppression list is the list of addresses that the email campaign is never sent to. This list includes opted-out email addresses. The suppression list is created before the email is sent out so that none of the email addresses on the list are sent the campaign in order to stay CAN-SPAM compliant.

Surveys and Web Forms: Surveys are a set of questions that are used to gain someone's contact information, gauge customer satisfaction, register for an event and more. Swiftpage provides the ability to create surveys and web forms. The survey/web form can be linked to, from or within an email or embedded on a website or landing page. When someone submits the survey form, the information is entered into your integrated database as either a new contact or updating the data of an existing contact. The Swiftpage Survey can then automatically load the contact into a Swiftpage Drip Marketing campaign.

URL: URL is an acronym for Uniform Resource Locator. A URL is the address on the World Wide Web at which a specific webpage can be viewed. For example Swiftpage's URL is <http://www.swiftpage.com/>.

Unsubscribe: Due to the CAN-SPAM Act you must include an opt-out method in all email communications. This allows the recipient of your email to unsubscribe from your messages if they wish to no longer receive them. This method is also known as opting-out.

Whitelist or Safe Sender list: A list of email addresses that have been approved by a recipient. Adding an email address to your address book within your email client commonly identifies that contact as a safe sender and maintains them on your whitelist. Contacts on whitelists avoid Spam filters and images within their emails are automatically downloaded.