

Mandate Mail Instructions

(revised January, 2021)

Using Mandate Mail: Your Email Broadcasting Tool

Getting in

To access your Mandate Mail account, visit: <http://www.MandateMail.com> and log in with the username and password we have provided for you.

Once you have logged in, you will be directed to the Campaigns section of the system. The system is divided into five main sections: **Audience**, **Campaigns**, **Response**, **Automation**, and **Insights**. To navigate between the sections, click on the tabs at the top of the page.

If you're having trouble logging in, we can help: just contact us at support@mandatemediacom.

Audience

This is where you will manage your database of email addresses. We've added your initial lists for you and we're happy to upload large lists for you in the future, but small lists and individuals are easy for you to add.

Audience Basics

An email address is the basis of a contact record in Mandate Mail. That means that a contact in Mandate Mail has one and only one email address, and an email address is associated with one and only one contact in Mandate Mail.

If a person signs up for your list more than once, or you add or import them more than once, the system will never create a duplicate record as long as the email address is the same. That said, if someone signs up with the same first and last name but a different email address, the system treats the new email address as a different contact.

Contact Status

Each contact in the system is assigned to one of three statuses:

Active: This is the default status; folks with this status are signed up to receive your emails.

Opt-out: This is the status for folks who have opted-out of your mailings. Once a person's status has been set to opt-out, **they cannot be manually resubscribed** (that is, you can't manually change their status back to active, and even if you re-import their email address their status will

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remain "opt-out"). If they opted-out by accident, they can fill out a form on the website and confirm that they want to be added to the list again, and then they can get back on.

Error. Contacts with the Error status aren't expected to receive our emails; generally speaking these are bad email addresses. You may change a contact's status back to Active if you wish to retry their email. Below are a few reasons that a contact's status would be changed to Error:

- You've imported a file that has a blank field in the email address column.
- You've imported a field that has a malformed email address (e.g. an email address that's missing the @ sign, or the .com)
- Mandate Mail got a bounce-back message when it tried to send mail to that address. How quickly a contact changes to the "Error" status depends on the bounce back message that's received; we'll retry a bouncing email address up to four times before moving it to the Error status.

View all contacts

To quickly view your member list, click on the Contacts label from the left-hand sidebar. This will display a table of all members in your database. Your audience is separated into three tabs based on their contact status (Active, Error, Opt-Out, see above).

Export contacts

If you wish to export your full list of subscribers, click on the Contacts label from the left-hand sidebar, then click on the "Export" button at the top of the list of contacts.

Organizing & Segmenting Members

There are two ways to organize your audience in MandateMail: a) collect your members in various **groups** or b) **segment** by searching for members based on specific criteria.

Groups

The basic idea behind groups is that you create 'em and then you put people in 'em. We'll put people into a specific group when they use a specific signup form, and you can add people to groups when you import them (or when you add an individual). Subscribers can be in as many groups as you like. What you traditionally think of as a list (e.g. your donor list, your volunteer list) are set up as groups in Mandate Mail.

To see your groups, click on Groups from the left-hand sidebar. This page lists the groups in your account and how many members are in each group. We've already created/populated some groups for you, but you can add as many as you need to manage your lists of supporters.

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And be liberal about it! Volunteers, donors, board members, etc. Create as many groups as you likes and, don't worry, **if you send a particular message to more than one group, each individual will only receive it once, even if she's in two groups.**

That said, you can also choose to send a message to a set of subscribers based on some search criteria, so you may not need to create a "group" for every characteristic. More on creating segments down below.

Test groups: In addition to your regular groups of subscribers, you can also have several Test Groups. These groups are for you to use when you're sending drafts of your messages. (FYI messages to these groups don't count for billing purposes). We've already set up your primary test group for you: *Test Group* includes your team's email addresses. Feel free to add additional test groups as you need to. And be sure to send a draft of your email to one or more of these test groups so that you can see what your finished email looks like before you send it out to your entire community.

Segments

In addition to creating groups, you can also use Segments to view and select a subset of your subscribers. From the main Audience screen, click on the Segments label in the left-hand sidebar to view your saved segments. If you have any saved segments, they'll appear on this page. To start a new segment, click on "create a segment" on the right. You can search for subscribers using the following criteria:

- Audience Groups – e.g. a member of X group but not Y group
- Contact Information – any data we have in MandateMail, e.g. subscribers in a particular state, or zip code radius
- Response History – e.g. clicked on the last email message you sent
- Signup/Manage Preferences History – e.g. subscribers who signed up in the last 7 days

With Segments, you can explore your list and divide it into small, targeted sections. You can then save these segments, and they will be updated every time you view them to include the latest subscribers who meet your criteria. You can also use these search results as your audience when you send an email message.

Important note: The numbers that appear in the "active", "opt-out" and "error" columns when you're viewing the list of segments are cached, meaning that they are saved in the database and the numbers aren't constantly updated. That has two ramifications for working with segments:

- 1) When you set up a new segment, sometimes the counts will stay at 0 for a few minutes even though you're seeing results of your search. Don't worry, those counts should update

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themselves automatically within a few minutes. If they don't, let us know at support@mandatemediacom

- 2) When you're working with a segment that you've set up previously, the counts in those columns will be accurate as of the last time the search was run. To view the accurate counts, you'll need to run the search again; do that by clicking on the segment name. You'll be able to view the search results and the counts should update themselves.
- 3) Not updating these counts constantly allows MandateMail to conserve resources and hopefully the notes above will help you navigate any confusion around those numbers. And don't worry, when you send your mailing to a Segment, the search is run immediately before sending so your mailing always goes to the most updated group of subscribers that match your search criteria.

We've already created two searches for you:

- *In Limbo* lists everybody who isn't in a group yet: this is useful to check now and then to make sure you're not missing anybody.
- *Everybody* lists everybody who is in a group. This is the "search" we'll use to send our messages until we get to a point where we want to start segmenting the list more effectively.

Please contact us if you have questions about using Segments to select members of your database. It's a powerful tool and we're happy to help you use it effectively.

One last note about groups and segments: While groups are static -- once you put someone in a group, they're in that group until you take them out -- segments are dynamic; when you send a campaign to a segment of your list that you've created via search, the system selects the members who match your search criteria at the moment the message is sent, so the audience is up-to-date as of that moment. When viewing the list of segments, however, the "active members" number may not be accurate - to get an accurate count, click on the segment name and your results will be updated automatically to give you an accurate count.

Adding/Importing Members

If you just have a few addresses to add, first click on Contacts in the left-hand sidebar, then click on "Add Contact" button in the upper right and follow the instructions. The only necessary field is email address but if you have additional information about a member, feel free to add that as well. You can select which groups this person should belong to by marking the appropriate checkboxes on the right hand side.

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If you have a large list -- say, one with over 1000 email addresses -- please send your list to us and we'll import it for you. This can help avoid problems with deliverability that can occur if we send mail to a large, new list of folks.

For lists of fewer than 1000, follow these steps:

Step 1: Prepare Your File

To add multiple subscribers to your audience, you can just upload a file to the system. The file must be either an Excel (.xls, .xlsx) or a Comma-Separated-Values (.csv) file, and can have as many columns of data in it as you like. Your spreadsheet does not need to have a header row. Each individual record in Mandate Mail will come pre-populated with the following data fields: email address, first name, and last name. Your data may include additional fields; when you import your file, you will simply tell Mandate Mail to ignore these fields; that said, if your file has lots of extra data in it, you may wish to remove the extra fields just to speed up the upload & import process. (Note: We can add additional fields to your Mandate Mail database if that would be useful. Just ask us!)

Step 2: Create Your Group

Once your file is ready for import, we want to create a new group to add these names to. From the main audiences tab, hit the "Create a New Group" button. Enter your group name in the box that pops up and hit Create Group. You'll see your new group appear in the list. Now you're ready to move on to Step 3.

Step 3: Import

With your data file ready, click on Imports in the left-hand sidebar, then click the "Import Contacts" button. Follow the detailed instructions to complete your import. When asked whether you want to "update" members or "add only" you want to select "update" as this will update any subscribers that already exist in your database with the information you're importing. Once your import is completed, be sure to click on the "view status" button to check on your import. If there was anything wrong with your imported file, it will tell you here. If everything was successful, it will report how many members you imported and a few details about them.

Other Functions

- **Find contacts:** You can quickly and easily search for a specific subscriber in your database by typing the name or email address you want to search for in the search bar at the top of the Contacts (look for the magnifying glass). From the search results page, click on the name or email address to edit their contact record.
- **Unsubscribe contacts:** Your contacts can unsubscribe themselves at any time by clicking on the "get off all our lists" link in the bottom of every email we send them. But you can also

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manually unsubscribe someone if you need to. First, use the search bar to find the contact. Click on the name or email address to edit their member record. On the top of the member record page, look for the "Contact Status" section. In the "change status" field, change the dropdown menu from "active" to "opt-out". If the status already says "opt-out" the person is already unsubscribed. Once someone has been changed to "opt-out", you can't change their status back to active; similarly, if you try to add or import this email address again, it will always remain opted out.

- **Resubscribe a member:** If an unsubscribe has happened by mistake or a person has changed their mind, there is a two-step process to get them back on the list. First, have them fill out the form on your website that adds them to your list. Second, they will receive an email asking them to confirm that they want to be added back to the list. They'll need to click on the link in that email before their status will be changed back to "active".

Campaigns

From the Campaign screen, you can click on the name of an existing email message to edit it, or follow the steps below to create a new email:

Step 1: Click on the "Create New Campaign" button.

Step 2: You'll have a choice to select a "Regular Email" or "A/B Test". Give your campaign a name. This name is only used internally, so make it something that makes sense to you and your team.

Step 3: Next, you can choose to start your email by cloning a previous email, or by starting from scratch.

To clone a previous email, ensure that "Recent emails" is highlighted, and click "start here" on the thumbnail of the email you want to clone.

To start from scratch, click on "Shared templates". You'll see a thumbnail of one or more available templates for your mailing. Click on "start here" in the thumbnail to select the template that you want to use. (Contact us at support@mandatemediacom if you need a new template or edits to an existing one).

Step 4: The next step is to delete all the placeholder boxes that are preloaded into your email. We suggest you do this first because any element you don't remove will be included in your final mailing. To remove an element, move your mouse over it until you see it highlighted by a yellow box, then click the trash icon.

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Note that there's a somewhat hidden element that needs to be removed as well: there's a line element above the text box at the bottom of the editor window. See screen shot here:

Lorem Ipsum

Dolor sit amet, consectetur adipiscing elit. Duis euismod ultrices lacinia. Aenean eget urna ut diam hendrerit accumsan. Maecenas a porttitor diam. Suspendisse potenti. Aenean ac risus ut lectus volutpat elementum at sit amet ligula. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Etiam at tellus vitae ligula laoreet laoreet ac sit amet eros. Donec pharetra luctus nisl, vitae imperdiet justo ultricies non. Sed a augue elit. Donec venenatis condimentum leo id adipiscing. Aenean et mi erat, a ultrices elit. Aenean vulputate sagittis laoreet. Etiam se

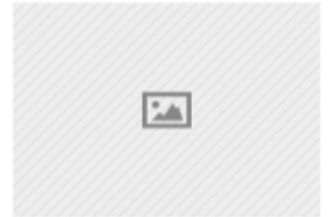


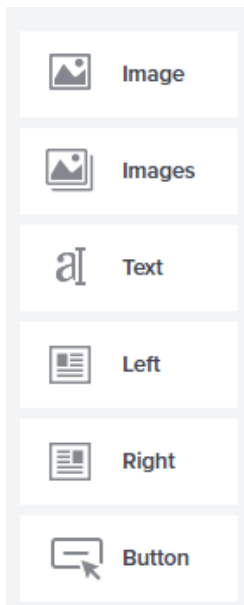
Image caption

Lorem Ipsum

Dolor sit amet, consectetur adipiscing elit. Duis euismod ultrices lacinia. Aenean eget urna ut diam hendrerit accumsan.

Step 5: Once you've removed the placeholder boxes, you're ready to start creating your own layout.

Using the drag and drop editor, you will arrange your own combination of text boxes and image boxes to create your layout. To start composing your email, select an element from the left hand side of the screen, and drag it into the editor window where you want it to appear. Here's a summary of the available elements you'll use most often:



Use this block for a full-width image.

Use this block for multiple images; these can be aligned in a horizontal row or a vertical column.

Use this block for a full-width text area.

Use this block when you want a combo box, a text area with an image in the upper left corner, and the text wrapping around it to the right.

Use this block when you want a combo box, a text area with an image in the upper right corner, and the text wrapping around it to the left.

Use this block to add a clickable button to your email.

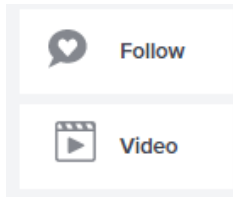
Please read the sections below with details about working with text and images.

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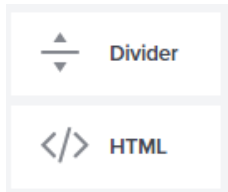
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The following elements are also available, but should only be used in specific circumstances, and we'd prefer to discuss with you how to best use these options.



Use this block if you want to include social media icons in your mailing. However: if you'd like these included in every mailing, contact us and we'll add them to the template so you don't have to add them every time.

Remember that we can't directly embed video in an email (since most email programs won't display it) but we can instead include a thumbnail image that links to the video. This handy button will do that automatically for you. However, we typically recommend that you drive traffic to your video embedded in a page on your website, rather than to the video's page on YouTube or Vimeo, and that's not an option with this tool. Contact us if you need help linking to a video in your email.



This block allows you to include a horizontal rule, or a dividing line between elements. We tend to think these are unnecessary clutter in your email. But you can include one if you want to separate sections of your email.

Use this block if you want to add your own custom HTML into a block in your email. We're happy to help you craft some custom HTML if it's necessary to achieve your goals for your email.

Adding/Editing Text

Once you've positioned a text element in your layout, click on the lorem ipsum text to edit the text area. You can always type directly in the box (don't forget to delete the placeholder text) or you can paste your text from somewhere else, like Microsoft Word. Before you paste your text, hover over the text area and click on the option that says "Text pasting". The new editor has two options for how to handle pasted text. The "Paste without styles" option will strip out any formatting and paste just plain text; **this is the option we recommend**. The "Paste with styles" option will maintain the formatting from Microsoft Word, but may also carry over code or formatting that you don't want, and can introduce errors in the coding of your mailing. We recommend selecting the "Paste without styles" option. This carries over to all text areas in your mailing.

Once you've typed or pasted your text, you'll format it using the toolbar at the top of the editor window. You should be familiar with most of these formatting buttons - but if you have any questions about how they work, you can find more information [here](#) or shoot a note to support@mandatemediacom

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To insert a link, highlight the word or phrase you want clickable, and then click on the chain link icon and fill in the necessary fields.

To add a personalization field, like first name, put your cursor where you want the field to appear, then click on the Insert button, and select the "personalization" option. A small toolbar will be displayed beneath the formatting toolbar. Click on the dropdown menu next to "field" and select the field you want to insert. In the placeholder box, type the text you want to use if that field value is empty. (e.g. select "First Name" and type "Friend" in the placeholder box).

Adding/Editing Images

Once you've positioned an image element in your layout, click on that image element to add your image. The "Insert an image" window will pop up and you'll be able to select your image. We recommend that you upload a new image, or use an image you've already uploaded (find those by clicking on the Library tab). To upload an image, follow these steps:

1. Click on the Choose File button and select an image from your computer.
2. You can edit your image -- add effects, rotate, or crop your image -- by clicking on the Edit this Image button at the top. If you click on that button but decide not to make changes, look for a small x in the upper right hand corner to cancel your changes.
3. If you want your image to link somewhere, enter the URL you want it to link to in the "Give this image link" field.
4. Some of your subscribers will read your emails without displaying images (because they have them turned off, or they're using adaptive technologies). It's a good idea to add some text to be displayed if an image is not displayed. This is critical if your image is a key part of your campaign's message. Add this text in the "Alternate text" field.
5. We recommend that you size your image appropriately for your campaign before you upload it (usually 300 pixels wide, never bigger than 600 pixels wide), but you also have the option here of shrinking your image by using the Size dropdown. You can experiment with the options to see which size looks best.
6. The padding box adds some spacing between your image and the text wrapping around it. The default value of 10 should be fine, though you can edit it; click on the gear icon to edit the specific values for each side of your image.
7. Hit "Insert Image".
8. Your image will appear in your layout. You can edit it again at any time by clicking on it.

You can also use the following options to include images, though we highly recommend using the upload steps above:

- Facebook: Click on the Facebook tab to link your Facebook account and select a photo from there.
- Flickr: Click on the Flickr tab to connect to your Flickr account and select a photo from there.

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- Stock images: Click on the Stock Images tab to select a stock photo to use in your email (there is a fee for each image).

Need more help? You can find more information about working with images [here](#). Or, as always, send any questions to support@mandatemediacom

Working with Elements

Once you've added an element to the editor, there are several icons that appear when you hover over the box:

- Click on the arrows on the far left if you want to reposition your element.
- Click on the gear icon to edit the styles or settings for this text box. (More on that below).
- Click on the + icon if you want to duplicate this element.
- For text elements, the "Text Pasting" option will appear. See details in the text editing section above.
- Click on the trash icon to remove an element.

Element Styles and Settings

Clicking on the gear icon opens up a window where you can change the styles or settings of your element.

The **Styles** options let you change the background color of an element, the margin (that is, spacing between this element and other elements), the padding (that is, spacing between any border you've added to the element and the content of the element), and borders.

The **Settings** options include:

- Text: Hide or show text in a text or combo box.
- Wrapping: Turn text wrapping (around images) on or off.
- Images: Hide or show images in an image or combo box. If images are on, the following additional options appear:
 - Count: Add additional image place holder boxes by increasing this number.
 - Smart sizing: Forces multiple images within the same element to be the same size.
 - Captions: Turn on to add a caption to your images.
 - Position: Use this to align your images left, right or center.

Other Tools

- **Show templates:** This option appears at the top of the editor window, under your mailing name. Click "show templates" if you wish to change the template being used for your mailing.

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Along the top row of the editor, you'll find several useful buttons:

- **Save:** Your mailing will be autosaved for you, but make sure you click the Save button when you're done making changes. Click on the arrow next to "Save" and you can save a copy or save and close the editor.
- **Undo/Redo:** The left and right arrows next to the save button are buttons to Undo or Redo the last action, respectively.
- **Preview:** Click on this button to preview your email across different devices. We recommend actually checking your test email across multiple devices, but this is a useful tool to check before you send a sample. More details below.
- **Send test:** Click this button to send a test message.
- **Review & Send:** When you're ready to send your mailing, click this button. Details below.

Below this row of buttons are two additional options for styling your mailing:

- **Columns:** By default, your mailing is set up for one column. We recommend this style of email -- one that is relatively simple and short, that encourages people to read it and click on the action in the email. If you prefer to send a newsletter-style email, you can arrange your mailing into columns by clicking on the Columns link in the bar at the top.
- **Template:** You can change the formatting of the mailing (background color and border) by clicking on the template link, though we don't recommend changing these settings.

Getting Ready to Send

Follow the following steps when preparing to send your mailing:

1. **Review the plain text version of your mailing.** Click on the "HTML view" link in the upper right hand corner of the editor and switch to plaintext view. The plaintext version will be generated for you, but you may wish to edit or reorder the content for plaintext readers.
2. **Preview your email.** Click on the preview button to review how your email will appear across various devices and screen sizes. Click the buttons across the top to preview

Tip! We recommend typing your subject line in, rather than pasting text from Word. Some special characters in Word can cause your subject line to be improperly formatted. For example, smart quotes or apostrophes, emdashes, etc. In order to avoid any potential problems, just type in the subject line.

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desktop, mobile and tablet displays; use the boxes on the right to change the dimensions.

3. **Send a test:** Click on the Send Test button when you're ready to see a test of your mailing in your inbox. Add up to 25 email addresses in the to: field. Enter the subject line in the subject line field (the word "TEST" will be appended to your subject line of your test, but will be removed when you send your mailing to your selected audience. The "Preheader Text" field will appear as the teaser text of your email in some email programs. You can add a short note at the top of your test message by completing the "note" field. If you wish to use something other than the default, you can change the sender name and email address here as well.

Tip! You may see a "Proofing Issue!" warning in red letters under the Send buttons. If that's the case, we recommend double-checking your links in your test message. If they work in the version that you received in your mailbox, you can be confident that they'll work for your recipients, even if this warning is displayed. (This is very likely to happen if we host your website, as we have security measures in place on your website to keep out malicious robots; those measures also prevent the Mandate Mail link checking robots from working correctly). If you have other questions about proofing errors, just give us a shout at support@mandatemediacom.

When you've reviewed your test message and tested all the links and are ready to send, click on the Review & Send button.

On the left side of your screen you'll see a preview of your mailing. Below that are a few options that you can ignore, as the default values are sufficient. The fields you need to pay attention to are on the right side of the screen:

- **Choose Recipients:** Click on the icon on the right to select the audience for your mailing. You can select a saved segment (use the segments tab) or a group, several groups, or all groups (use the groups tab). Select multiple groups by clicking on each group you want to add to the audience. You can also add an individual by typing an email address in the box. Remove any individual or group you've added by highlighting the name and hitting the delete button.
- **Subject Line:** Type your subject line in the box.

Tip! Split testing is awesome! If you wish to test multiple subject lines, click the "Switch to Split Test" button. Then you'll see three subject line boxes appear, but we recommend only testing two subject lines at a time. Enter your first subject line in the box labeled Variation A, and your second subject line in the box labeled Variation B. Mark the checkbox to autosend the mailing to the better-performing subject line. Keep in mind that the test will run for four hours, at which point, the winning subject line will be selected and that subject line will be used to send the message to the remainder of your audience. More details on split testing subject lines can be found [here](#).

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- **Preheader Text:** This option allows you to add a short, 75-character message that will appear, for some readers, as the teaser text for your email. We say some readers because some email programs (specifically Hotmail and Mac Mail) do not display this text. If you chose to use it, make sure it's relevant to your message and encourages people to open your email. If you don't use this field, the first line of text of your email will be displayed.
- **From:** The "from name" and "from email address" will appear as the sender information on your mailing. You may change these to anything you'd like, but make sure that the "from email address" is a valid email address. If a subscriber replies to your mailing, the reply will go to this address; or you may select a different reply-to address. Be sure those replies go to a mailbox that's being checked, in case there's something important that should be responded to.

At the bottom of the page are the options for sending:

Send Now

You can choose to send your mailing (or start your split test) right away by clicking the orange button. That's the send button. Be sure everything is correct and you're ready to send your mailing before you click this button. If the orange button is grayed out and not clickable, your mailing is probably autosaving. Wait just a moment and the button should brighten and become clickable.

Schedule your mailing

Alternatively, you can click on the "Schedule for later" link and set up your email to be sent at a specific time. You can schedule mailings hours or days in advance, but they can only be scheduled for the top of the hour.

If you schedule your campaign for later sending, you'll see it listed on a new tab called "Scheduled" on the Campaigns page. If you need to cancel your mailing, you can do so from the Campaigns page. If you need to make changes to your campaign, you should cancel the scheduled mailing and then make changes to your saved campaign and reschedule it. When scheduling a mailing, the time zone used is the time zone set for your account (you should be able to tell based on "last updated" times on the campaigns page. If you need help with your time zone, let us know.

IMPORTANT: What to do when you've scheduled a mailing and you want to make changes to it. If you have scheduled a mailing and you want to make changes to that mailing, or change the time that it should be sent, follow these steps:

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- 1) Click on the Campaigns icon. Then click on the "Scheduled" tab.
- 2) Click on the arrow to the right of your scheduled campaign. Select "cancel this mailing". Confirm your request to cancel in the dialog box.
- 3) Now, you should return to the "Saved" tab. Click on your campaign.
- 4) You can now make the edits you need to make and schedule the mailing using the Send options.

If you make changes to a scheduled campaign but don't click on "Send" and schedule that mailing, your previously saved version will be what is sent to your audience. If you don't cancel your first mailing before saving and scheduling another mailing, both mailings will be sent to your audience

After You've Hit Send

Once you've sent your mailing, the first thing you should do is post the content of your mailing as an entry on your website. If you need help with that, just drop us a line and we'll give you a walk-through!

On the screen after you've sent your mailing, you'll see options to share your content on Facebook and Twitter. We're all for sharing, but we think you'll get more out of sharing the content you've just posted on your website, rather than using these share options. Also, these leave room for error --- we don't want you accidentally sharing content on the wrong Facebook page or Twitter account, so better to just skip this step and handle your sharing manually.

A Few More Tips

- Keep it short and simple
- Use a graphic or a button to draw attention (but use them sparingly; too many attention-grabbing elements can cause confusion and inaction).
- Link to items instead of including large amounts of text or pictures
- Don't say "click here"; instead, use action verbs like donate, read, do, etc.
- But don't include the full URL as your link -- make the phrase "read more" or "donate now" clickable
- Do not include a background color and stay away from lots of borders, boxes, or pictures. The more formatting in your email the more it will look like spam!

Questions? Contact us at support@mandatemediacom.com.

Mandate Mail Instructions

(revised January, 2021)

Response

We start tracking metrics as soon as people begin receiving and reading your email. You'll be able to see how many people opened your email, clicked on the links, etc. To see the details of a particular email's performance, scroll down past the chart on the main Response tab and click on the name of the email you want to review.

The numbers at the top of the page are an overview of the key metrics for your campaign, including open rate (and number of opens), click-thru rate (and number of clicks). You can click on any of those numbers, or the tabs at the top of the screen, so see a list of subscribers who opened, clicked, etc.

You'll also see your "Mailing Score" in the upper left. This "Mailing Score" factors in those critical metrics -- open, click-through and opt-out rates -- and combines them into a composite score on a 10-point scale. You'll see this Mailing Score approximately 24 hours after your mailing was sent. You can use this number as a quick and dirty way to compare the performance of emails that you've sent out, though we encourage digging into the individual metrics to better understand your email's performance. Because your audience and your messages are unique, we always recommend that you compare the performance of your mailing against other mailings you've sent, rather than against any industry benchmarks. So, while you'll also see a "community average" Mailing Score displayed, we encourage you to pay more attention to the Mailing Score as compared to YOUR previous mailings.

Below these numbers is a copy of your email with your click activity superimposed over your email. (If you don't see it, click on the button labeled "Highlight click activity" just above the preview.) The bright green circles on your email highlight the places where people clicked on your email; bigger circles = more clicks! You can also hover over the circle to see the exact number of clicks that link received. If you prefer to see a list of the links clicked, just click the "List" link on the right above the preview window.

To the left of the preview, you'll see the percentage of folks reading your email on mobile devices and a list of email clients your subscribers are using to read your email.

While most of your response will occur within the first 48 - 72 hours after you've sent, those totals will continue to tabulate for days. Bounces in particular take at least 24 hours to finish processing, so give your mailing plenty of time before considering any results official.

Questions? Contact us at support@mandatemediacom.com.

Mandate Mail Instructions

(revised January, 2021)

Automation

The Automation tab allows you to easily set up an email (or series of emails) to be sent automatically when a specific event occurs. You'll use the Automation section to set up a Workflow: that's where you'll define what you want to trigger your email, what email you want to send and when, and who should receive it.

We encourage everyone to use this tool to set up a welcome message to be sent whenever someone signs up for your list. We'll use that as an example to describe how to create a Workflow.

First, you need to create your welcome email in the Campaigns section. If you wish, you may create several emails to be sent in a series. Set up and save your emails; then return to the Automation section to start your Workflow.

Click on the "Create a new workflow" button in the upper right (of the Automation section) to set up the workflow to automate the sending of your message. Follow these steps:

Workflow name: Give this workflow a name so that you and your team will recognize it later. E.g. "Welcome email for signers of main website signup form".

Choose your audience: Select the audience to whom this workflow applies. In most cases, you'll want to apply this workflow to everybody, so select "Any contact in my audience". Click "confirm".

Choose your trigger event: This is what will serve as the trigger for sending your email. Your trigger can be [based on a date](#), a [field change](#), or a [link clicked](#) in an email; most commonly though, and for our welcome email example, you'll choose the [Email signup](#) option. Click "Next".

Choose your signup sources: You'll see a list of the signup forms in your account; select the ones that you want to trigger your welcome email message (most likely you've written a specific welcome message with a specific form in mind, so you'll probably select only one form). Click "Next". Then click "Confirm".

Choose your email: Click on the email icon to see a list of your saved email messages and select the one that should be sent when someone completes your signup form. Click "next".

Immediately (timing): You can have your welcome message sent immediately after signup, or you can set it to send hours, days, or weeks after signup.

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Mandate Mail Instructions

(revised January, 2021)

For a series of emails: To set up a series of messages, click on the "+email" button and follow the same process to set up the remaining messages in your series.

When finished, click on the "Save Workflow" button at the top. This saves -- but does not yet activate -- your workflow.

To activate your workflow, toggle the "workflow status" button above the "Save workflow" button.

For more information, check out these [detailed instructions and examples of the Automation tools](#) provided by our technology partner, Emma. When you're ready to set up your own Workflow, drop us a line at support@mandatemediacom if you need any assistance.

Insights

You can also export out tracking data from your campaigns. Choose the date range and click "Export as CSV" to download the data.



Questions? Contact us at support@mandatemediacom.

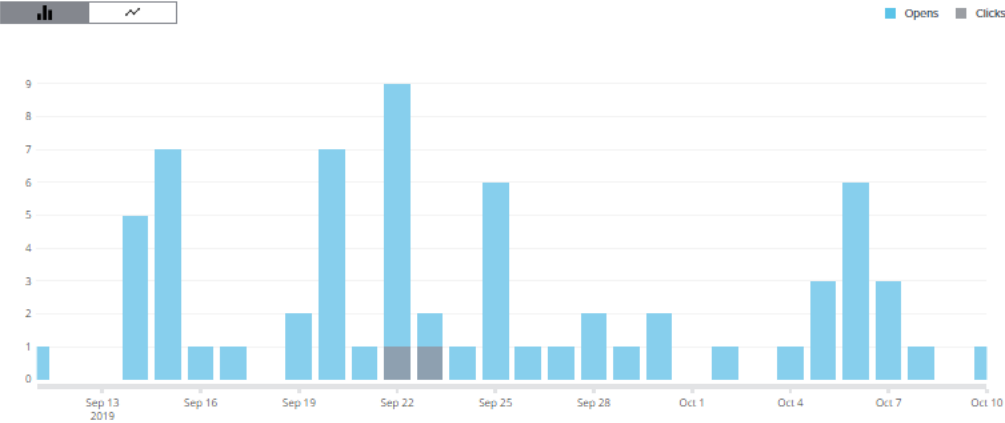
Mandate Mail Instructions

(revised January, 2021)

There are four sections of Insights, **Engagement, Growth, Trends, Exports**. Here you can see campaign performance trends, engagement heat map, subscriber list growth, trends, and exported reports. See an example below of the type of reporting you can view:

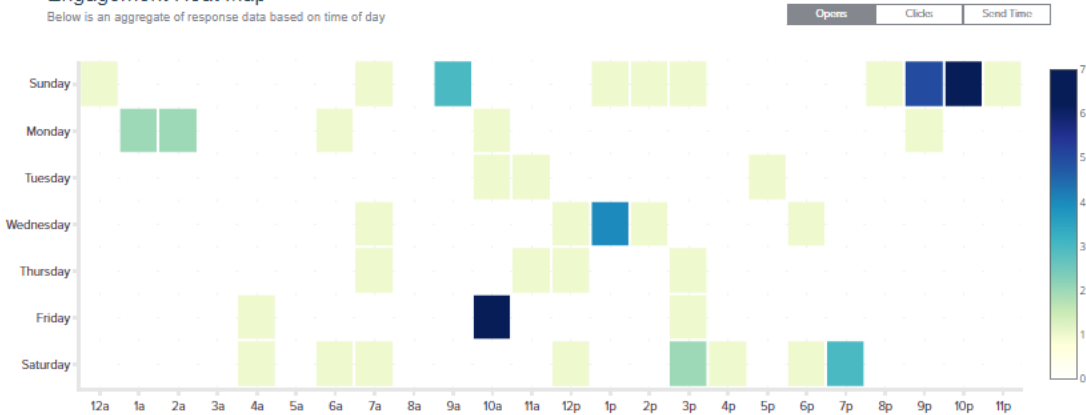
Campaign performance trends

Showing performance data from Sep 11, 2019 to Oct 10, 2019



Engagement Heat Map

Below is an aggregate of response data based on time of day



Questions? Contact us at support@mandatemediacom.com.

Mandate Mail Instructions

(revised January, 2021)

Last Thoughts

The Mandate Mail system, powered by Emma, is an incredibly powerful tool. There are hundreds of options, ways to capture data, and opportunities to strengthen your email campaigns.

We hope you'll take some time to dig around the system and familiarize yourself with these options. There is a significant system of self-help screens that can help you learn more about the system, but please don't hesitate to email Meaghan, meaghan@mandatemediacom.com, if you have any questions.

Let's change the world, and have fun doing it!

Questions? Contact us at support@mandatemediacom.com.