



## **Email Marketing Automation Training**

#### Courses

- 1. Advanced Automation
- 2. Content Blocks + Dynamic Content
- 3. Edit Footers
- 4. Automated Messages
- 5. Survey Creator
- 6. Site Visitor Signup Box
- 7. Template Editor



# **Automated Messages**





#### **Automated Messages**

An automated message is a single message that will be automatically sent to subscribers when the conditions of the automation are met. The automated message can be sent to subscribers:

- 1. **On a specific date**: sent on a saved date, such as the subscriber's birthday
  - a. Need to save the date as a custom field value for the subscribers in a consistent date format
- 2. **Subscribers on a specific list**: sent to every subscriber on a list, sent once per specified period of time
  - a. For example, if you create a dynamic list that includes all subscribers who have a Status = "Prospect," they could be sent a reminder email to complete registration once a month until the custom field "Status" changes to "Registered."
  - b. It's a good idea to save the dynamic list in a specific List folder for automated messages. After creating an automated message based on a dynamic list, be very careful when editing the list. Any subscribers added when the list is saved will immediately be sent the automated message.

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- 1. Open the **Tools** folder in the left menu
- 2. Click on **Automated Messages**
- 3. Click Create
- 4. Type in a **Name** for the automation
- 5. Select a list to which the message will be sent
  - a. Select **No Subscribers** if you don't know which list you'll select in the future, and do not want to accidentally send to anyone while configuring and testing

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- 6. Choose whether to trigger the message by:
  - a. A custom field that's a date (ex: birthday)
    - i. If a date custom field is chosen, select a date format for the field (mm-dd-yyyy)
    - ii. The date format must be in the same exact format as the selected format
    - iii. If a subscriber's date custom field is in a different format from the selected format, the date will be ignored
    - iv. The frequency of this automated message will be limited by the send option to send the message only once (upcoming conference date) or every day (ex: check everyday to see if it's someone's birthday)
  - b. Subscriber is on a **list** selected above on this screen (ex: on a prospect list)
    - i. You can select a previously created dynamic list
    - The sending frequency of this automated message will be limited by the selected option: to send the message only once (upcoming conference date) or every year (ex: birthday)

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7. Now you have to configure when to send the automated message to the subscribers

- a. Send at: the time of day to send the message
- b. **Send Date**: on the day of the event (selected date custom field)
- c. **Frequency**: send the message only once (upcoming conference date) or every year (ex: birthday)

**Note**: By default, the Automated Message tool will only send to a subscriber a single time. If you would like to enable the use of the **Frequency** option, a member of the Critical Impact staff will be able to enable **Duplicate Sending**, which will allow the same message to be sent to the same subscriber multiple times.

d. **End Date**: optional to set a date to stop the automation

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8. **Status**: Keep Paused until absolutely ready to start sending the message to subscribers

9. Save the message by clicking the **Save** button or the **Save Automation** and **Create Message** button

10. Once the Automated Message configuration is saved, you'll need to create a message in the **Edit Message** tab

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11. In this tab, create the message you would like to send to the subscribers when all of the conditions are met from the configuration screen

- a. You'll only see the "Create New Message" page once when creating a message for the first time
- b. This message is the only message associated with the automated message
- You can edit the message at any time, but we strongly suggest keeping the message the same after activating the automation. See the Tracking an Automated Message notes below.

12. **Save** the message before returning to the Configure tab. Any unsaved changes will be lost

13. When you're ready to activate the automated message, select the Status: **Active** 

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### **Tracking an Automated Message**

The automated message tracking report will show under the report Email Tracking.

Please be aware that if the message content is edited a lot (links are edited/deleted), the stats may not look quite right. If many changes need to be made to the message, we recommend stopping the first automation and creating a new message automation.

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