Email Campaigns: MessagingZONE Content Development

1. Purpose

The purpose of this step is to develop fully formatted email content in MessagingZONE.

2. Scope

Design Development Engineers in Design Operations are responsible for developing email campaign content in MessagingZONE. Email campaign content development begins in MessagingZONE after MessagingZONE is identified as the chosen vendor in the SR and the Clean document has been posted to the Service Request (SR) for the mailing.

3. Definitions

Clean document: A "clean" document is a document that's been proofed by Design QA and reviewed by CS. Clean documents will have the "_clean" naming convention attached to the end of the document name within the SR.

Code: HTML or any other web language that's used in email campaign development.

CSV file (Comma Separated Values): A file type in which data values are separated by commas; in the email campaign process, the CSV file contains a list of recipient email address and any other dynamic information that is associated with each recipient. **Use a text editor such as Notepad or Notepad++ to open CSV files.**

Email campaign: Notices sent in bulk via email to individuals affected by a legal or financial event.

QC: Quality Control is when a DOQAE checks a developed form for errors.

Test CSV file: A test CSV file is used to test dynamic data within an email campaign. The CSV file should contain internal email addresses only.

Vendor Code: A code used in the Custom Properties section in an SR that shows you the vendor to be used for the email campaign request. The vendor code for MessagingZone is 1M/2M.

4. Preparation

Before you begin email campaign content development in MessagingZONE, make sure you have access to the resources listed below.

4.1 Prerequisites

4.1.1 Approvals

- Verification that MessagingZONE is the campaign vendor
- Login information for the MessagingZONE production account

4.1.2 Background

- Basic HTML

4.2 Software

- MessagingZONE

4.3 Materials

- Email campaign work order
- Clean document
- Email form number

5. Procedure

5.1 Set up CSV file in MessagingZone

5.1.1 *Work order review for dynamic content*

The Email Campaign Content Development task needs a test CSV file if the email includes dynamic information. *A test CSV file is not necessary for this task if the email does not contain dynamic information.*

1. Check the **Special Instructions/Customization** section of the work order to find out if the email will have any dynamic content.
   - If a test CSV *file has not been posted to the SR*
     - *set* your task *to "Pending" and*
     - post a comment to the SR stating that you're waiting for the test CSV file *to begin the task.*
   - *If the email does not have any dynamic content, move on to 5.3.*
2. Open the CSV file in Notepad or Notepad++. **DO NOT OPEN CSV FILES IN EXCEL**.
3. Check that your email address is on the list of recipients in the file.
   - If your email address is not on the list, add it.
4. Save the file.
5. Close out the file.

5.1.2 Add the test CSV file to MessagingZONE

1. Click **Contacts** on the MessagingZone navigation bar and select **Manage Contacts** from the dropdown menu.
2. Click **Import Contacts** on the Manage Contacts page that opens, as shown in Figure 3.

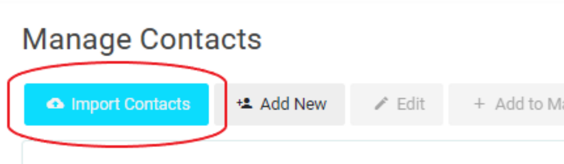

*Figure 1. **Import Contacts** button.*

Figure 3. Check that the data points map correctly.

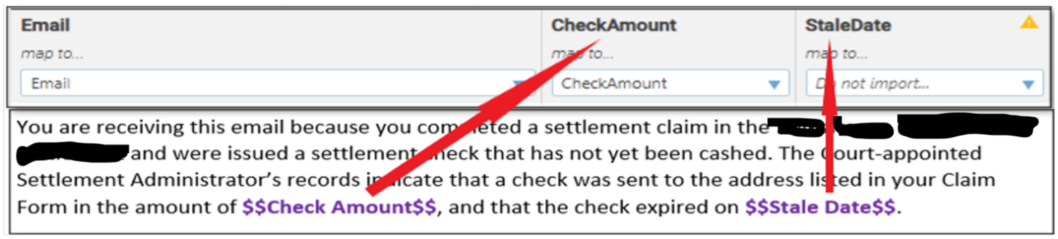

Figure 5. Check that the data points map correctly.

3. Select the **From Desktop** tab, as shown in Figure 4, on the Import Contacts page.

4. Drag and drop the test CSV file onto the Drag & Drop Files box, as shown in Figure 4.

5. Click **Preview & Configure**, as shown in Figure 4, to view the "Fields mapped" table.

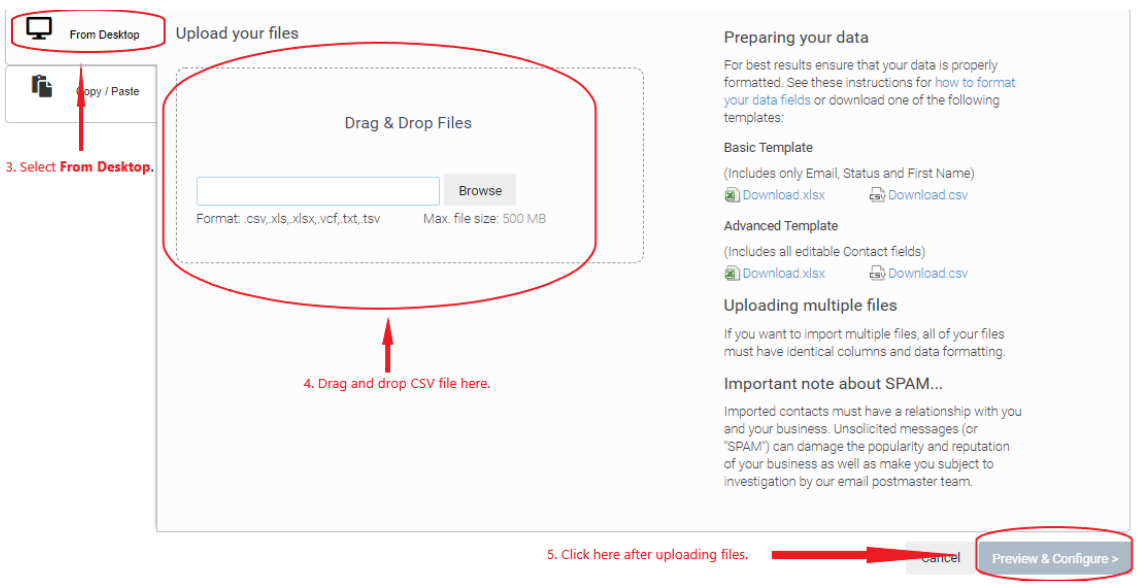

Figure 2. Import contacts interface in MessagingZone.

6. Check that each header is mapped to the right data point in the "Fields mapped" table. To do this, bear in mind that

   - Each column header corresponds with the name of a data point in the clean document, as illustrated in Figure 5;

   - You need to scroll horizontally across the table to check that you've verified every data point.

   - If you need to adjust the mapping, select the drop-down menu under each header name and choose the accurate mapping option for each field.

7. If a data field isn't populating here and you need to add a new data field, select **Create New Field** at the top of the dropdown menu under "map to," as shown in Figure 6.

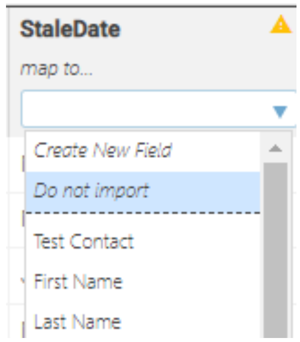

Figure 4. Map to a new field.

   a. Copy/paste the dynamic data label from the test CSV data file into the **Name** field in the "Create New Custom Field" pop-up window that appears.

   b. Select the drop-down menu next to the **Type** field and select **Text Box**.

   c. Select Save & Close.

8. Once the mappings are complete and accurate, select **Assign Mailing Lists** on the bottom right of the page.

9. Now on the third step of the Import Contacts process, add your initials to the end of Mailing List name in the field below Create a new Mailing List, as shown in Figure 7.

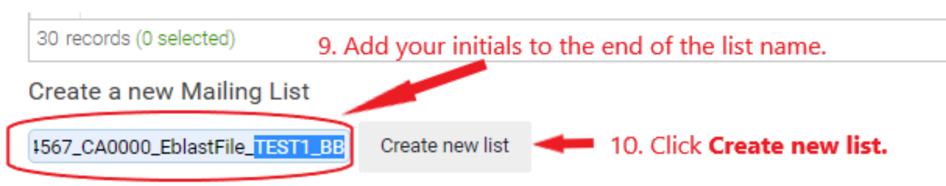

Figure 5. Update list name and create a new list.

10. Select **Create new list**, as shown in Figure 7. (This step creates a mailing list that ensures you won't have to select each individual contact when mailing the email design sample.)

    Note: Do not change the name of the CSV file. Keep the name of the list.

11. Wait for the contact import to complete.

5.1.3 Add recipients to receive the email design sample.

1. Return to the email campaign page.

2. Select your campaign.

3. Scroll down to the “Recipients” portion of your email campaign page.

4. Click **Select Recipients**.

5. Make sure that the correct mailing list/recipients is/are selected for the internal email design sample review in the Select Recipients for Email Campaign pop-up window that appears.

6. Click **Select**.

   Note: There should be roughly 5 recipients for a test csv. If you have more than that make sure you are not using a production csv file.

5.2 MZ Email Campaign Content Development: Email Layout and Naming

5.2.1 Email layout setup

1. Sign into the production MessagingZone account.

   Note: Make sure that you do not log into the training account and you have production credentials. If you do not have production credentials, contact a Design Development Engineer Lead.

2. Navigate to the MessagingZONE dashboard page.

3. From the MessagingZONE dashboard page, select **Email Campaigns** as shown in Figure 8.

Figure 6. Email

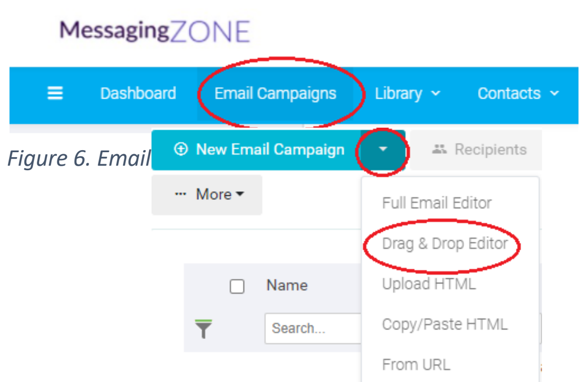

*Figure 7. **Drag and Drop Editor** option.*

4. On the Email Campaigns page, click the downward facing arrow next to **New Email Campaign** and select **Drag & Drop Editor**, as shown in Figure 9.

5. Click the **Start from Blank** button toward the top right of the page below the navigation bar.

6. Select the **Rows** tab on the layout navigation bar on the right side of the page, as shown in Figure 10.

7. Drag the single-column row from the available options, as shown in Figure 10, onto the main layout editor window.

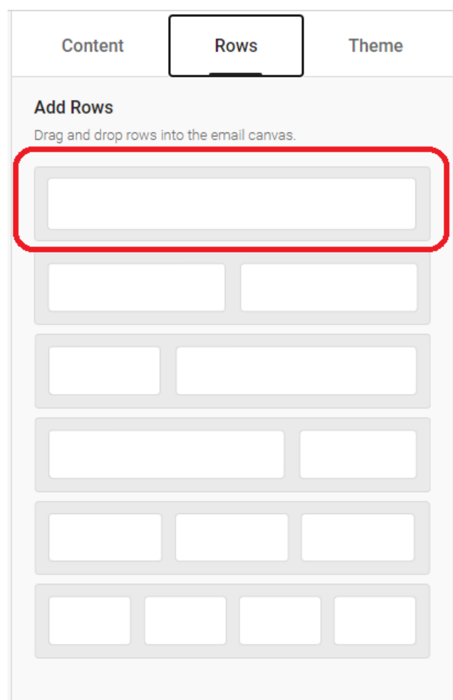

Figure 8. Adding rows to contain email text.

8. Select the **Content** tab on the layout navigation bar.
9. Drag the **Text** block from the available options onto the active editing area. You will see a ⃠ symbol until you drag the block to an active area.
10. Select the **Tools** button on the layout editor control bar to open the Tools drop-down menu
11. Choose **Copy to full Email Editor** from the drop-down menu options.
12. Stay on this page and continue to 5.3.2 (Email campaign naming).

5.2.2 Email campaign naming

It is important to name the email campaign in MessagingZONE so the email can be located easily.

1. While still on the full Email Editor page, click inside the editable box next to "Email campaign name" on the left of the page above the content editor (It may be populated with today's date).
2. Select all (Ctrl+A) in the content box and delete the default content (usually the date).
3. Write in the email campaign name using the naming convention in Table 2 below with hyphens between each part of the name.