



EMAIL CAMPAIGNS GUIDE



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With EZLynx Email Campaigns, you can build well-defined geographic, demographic and line-of-business recipient reports from your EZLynx data then send very specific marketing messages for pennies per recipient. This type of marketing has a high return-on-investment and is well proven to increase new sales, brand awareness, and customer loyalty.

1 ♦ Email Campaign Tips

1. Effective emails should be as short as possible. Most people don't like to read lengthy emails, so get right to the point.
2. Different segments of your customer base are interested in different things – be sure email messages are geared toward the targeted audience.
3. Read internet advice on how to avoid your emails being marked as spam.
4. The internet is full of great information about using email campaigns successfully.

2 ♦ Setup Tasks

The following setup tasks must be completed by an agency admin before using Email Campaigns.

2.1 Payment Method

EZLynx sends the agency admin an email that includes a secure pay link for setting up credit card or electronic check information to be used for campaign fees. Payment information must be setup before using Email Campaigns.

2.2 Set Signature for Emails

The signature set here is used for all EZLynx emails, and updates the Settings icon>Email Signature area also. These two areas for setting a signature are one-and-the-same. Both update the other.

1. Hover over the **Communication Center icon**, from **Email Campaigns**, select **Settings**.
2. At **Signature**, review the signature block that is pre-set.
3. To make changes, click **Modify** at right.
 - a. Set the **email address for replies**.
 - b. Make any changes to signature block.
 - i. To fix browser related **double-spacing issue**, Shift + Enter.
 - c. To add an agency logo below the signature:
 - i. Click the **picture frame icon**.
 - ii. Go to the agency logo on the agency's website in Chrome; right-click and **Copy image URL**.
 - iii. Paste into **Image Properties** box at **URL** field.
 - d. Choose when to insert this signature into Email Campaigns:
 - i. Insert signature on all emails.
 - ii. Or, only insert signature into emails with the **Agent Signature Personalization Tag**.
 - e. Click **Save**.

2.3 Set Default Consumer Quoting Portal (if applicable)

If your agency uses EZLynx Consumer Quoting, a link to the portal can be inserted in email campaigns by using Personalization Tags. To use this feature, be sure to set the default portal.

1. Hover over the **Communication Center icon**, from **Email Campaigns**, select **Settings**.
2. Go to the **Default Consumer Quoting Portal** area, select the portal and click **Save**.

3 ♦ Campaign Templates

Campaign templates can be used more than once and save time. Our design and content libraries have many options for quickly creating a campaign template.

3.1 Start a New Template

1. Hover over the **Communication Center icon**, from **Email Campaigns**, select **Templates**.
2. Use an existing template as a starting point, or click **Create New Template** at upper right:
 - a. Existing templates info:
 - i. An existing template can only be edited by the user that created it. Other users can make a copy then edit the copy.
 - ii. System generated templates cannot be edited by any user. Rather make a copy and edit the copy.
 - iii. A copy is made from **Actions icon** on the right.
3. Enter a **Template Name** – this is only seen by EZLynx users.
4. Decide whether to **share the template** with other EZLynx users; check appropriate boxes.

3.2 Select a Design

The email design includes the picture and content placement only – written content is separate.

1. Click the **Select Design** button to choose from our design library
2. Use categories or search box on left to find designs.
3. Click a design's **Preview** button to enlarge the design.
4. Click the design to be used, and click **Insert Design**.



3.3 Enter Content

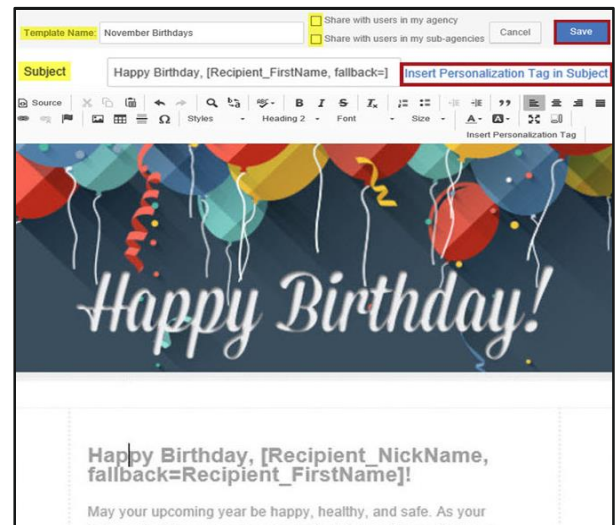
1. Enter a Subject for the email. Make the email subject line enticing, so it's opened instead of deleted.
2. At content area of the design, there are two options:
 - a. Type your own message.
 - b. Or, use the content library.
 - i. Highlight the text, and click the **Select Content** button.
 - ii. Use categories or search box on left to find content.
 - iii. Click a content's **Preview** button to read the entire content.
 - iv. Click the content to be used, and click **Insert Content**.

3.4 Insert Personalization Tags

Use Personalization Tags to personalize the email message. When an email is sent, a Personalization Tag is replaced with the applicant's true data, such as Robert for the "Recipient First Name" tag.

1. Place cursor in content at spot to insert Personalization Tag.
2. Click **Insert Personalization Tag**.
 - Can be added in email subject line or body.
3. **Select Tag**.
4. At **Fallback**, (this value is used if the applicant's tag data doesn't exist in EZLynx).
 - Check the **Use Tag as Fallback box** and **select a different tag as the fallback**.
Example: Nickname is the main Tag, and a nickname is not available in EZLynx, the Fallback Tag might be "Recipient First Name".
 - Or, uncheck Use Tag as Fallback box, and **type your own Fallback**.

Example: Nickname is the main Tag, and a nickname is not available in EZLynx, the Fallback might be "Friend".

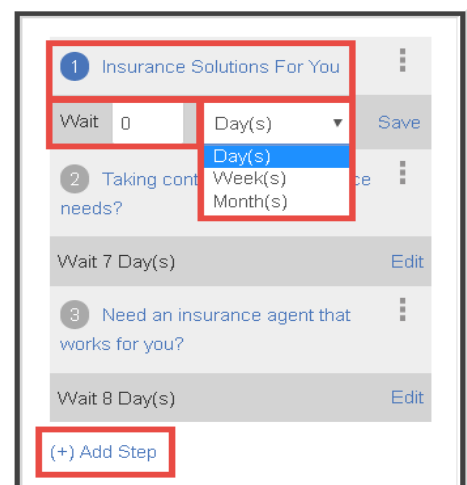


3.5 Add Multiple Steps (Emails)

An Email Campaign can be comprised of one or multiple "steps". A step is simply an email that is sent automatically at a designated time. A campaign with multiple steps is often referred to as a "drip campaign". Here is an example of a drip campaign - the first email is sent the day the campaign is started, a second mail may be sent a few days later, a third email in a week and so on.

Now that the first step (email) of your campaign template is finished, you may want to create additional "steps".

1. Go to the **Steps box**.
2. Click **Add Step** to create another campaign email. Repeat until all emails are added to the campaign.
3. Enter a **Wait** period for each step, and click **Save**.
 - Enter the number of **days, weeks or months** to wait before sending the email.
EZTip: Each email's wait period is calculated from the prior email's sent date.
 - "0" wait days, means the first email will go out the day the campaign is started.
 - Once the campaign template is finished, click **Save** at the upper right of page.



4 ♦ Recipient Reports

EZLynx Reports are used to create Email Campaign recipient lists from your agency's applicant and policy data. Therefore, it is important to enter applicants' email addresses into EZLynx as you work each day.

To Generate a Recipient Report:

1. Hover over the **Reports icon**, from the **Standard Reports**, select the **applicable category**.
2. Select a report (cannot use Master or Summary reports).
3. Manage Columns:
 - a. It is mandatory to **always include the Applicant ID column**.
 - b. Applicant Detail & Birthday Detail Reports **MUST include the Applicant ID, Co-Applicant ID and Relation columns**.
4. Apply filters to generate the recipient email list (for detailed report information, click [HERE](#)).
 - a. Consider whether sliding date ranges should be used.
5. Click the **Save** icon at upper right.
 - a. Enter a **recipient report name** and **description**.
 - b. Decide who can access the report, and **Save**.
6. Hover over the **Reports icon**, and select **All Saved Reports**. Report is now available here.

5 ♦ Schedule a Campaign

Campaign scheduling is flexible, and can be started from two places within EZLynx:

1. Hover over the Communication Center icon, and select New Campaign.
 - a. Send a single-email campaign, like a holiday greeting, to multiple recipients (various applicants).
 - b. Send a multi-email campaign to multiple recipients (various applicants).
2. Go to an applicant's Overview tab, to Campaigns box at top right.
 - a. Start up to 5 people (applicant, co-applicant and/or contacts) on any campaign.
 - b. Start a birthday campaign (birthday campaigns can only be started from applicant's Overview tab and must be scheduled one person at a time).

5.1 From Communication Center>New Campaign

Use this workflow to send:

- A single-email campaign, like a holiday greeting or newsletter, to multiple recipients (various applicants).
 - A multi-email campaign to multiple recipients (various applicants).
1. Hover over the **Communication Center icon**, and select **New Campaign**.
 2. Enter a **Campaign Title** (not seen by campaign recipients).
 3. **Define the Recipients** (select one option):
 - a. **Saved Reports** – select a saved recipient report.
 - b. **Other Lists** (may not be applicable to all agencies) – lists created prior to the “saved recipient reports” release. These lists can be used, but are no longer editable.
-

4. Click **Next**.
5. At **Setup**:
 - a. Click **Templates** button and select from the dropdown.
 - b. Click **Next**.
6. At **Review & Schedule**:
 - a. Review campaign details.
 - b. **Schedule campaign immediately or for a future date**.
 - If future date, click **calendar icon** to set a date and time.
 - c. Set whether campaign is for **Marketing or Non-Marketing** purposes.
 - d. Review campaign charges. Each campaign has initial \$5.00 charge, plus .01 per email recipient.
 - e. Send yourself a **test email** (optional).
 - f. Check the **charge confirmation** box.
 - g. Click **Schedule** at top right of page.
 - h. When an email campaign is sent, an Activity is automatically logged on every recipient's **Applicant Activity** tab – under **System Log** tab.

5.2 From Applicant Overview

Use this workflow to:

- Start up to 5 people (applicant, co-applicant and/or contacts) on any campaign.
 - Start a birthday campaign (birthday campaigns can only be started from applicant's Overview tab and must be scheduled one person at a time).
1. Go to an **Applicant's Overview** tab, at upper right click **Start Campaign**.
 - Only available when an email address is entered for applicant or co-applicant on Details tab.
 - If an email address has a red **X**, applicant's email is on the **Suppression List** (opt out).
 2. **Send Campaign as**: select the user to appear on the emails' From line, and user's email signature.
 3. **Template**: select the campaign template.
 4. **Add up to 5 Recipients**: applicant/co-applicant and/or contacts - use **Add Recipient** at upper right.
 - **Birthday campaigns** – must setup one person at a time.
 5. Select whether campaign is for **Marketing or Non-Marketing** purposes.
 6. **Activate On** – select the date to activate the first campaign step (usually the current date).
 - **Birthday campaigns** – check **This is a birthday campaign** box and this date is automatically set to the person's next birthday.
 7. Options:
 - **Schedule a reminder after final email** – helpful reminder to start a new campaign.
 - **Copy sender on campaign emails** – if sender wants to know when campaign emails are sent.
 - **This is a yearly recurring campaign** – check this for all **single-email campaigns** and campaign will automatically be sent for 5 years.
 8. Click **Schedule**.
-

6 ♦ Manage Campaigns

- To view scheduled or recently sent campaigns or drafts, hover over the **Communication Center icon** and select **Campaign Overview**. On any page, the filter icon can be expanded to **Filter by Template**.
- At the right on any campaign, are **Edit, Delete or Copy** actions.
 - A campaign can only be edited by the user that created it. It can be copied by another user.

6.1 Scheduled

Scheduled campaigns that are not yet complete appear in this list. The Step information is displayed for your reference.

- Click **trash icon** to **cancel the campaign** for everyone listed in under recipients.
- Click **copy icon** to start a **new campaign with the same template and recipient information**.



6.1.1 Stop a Campaign

1. For individual applicants:

- Go to the **Applicant's Overview tab**.
- At **Email Campaigns**, locate the campaign, and click the **"X"**. Any remaining campaign emails will not be sent.





2. Campaigns sent to multiple various applicants:

- Hover over the **Communication Center icon**, and select **Scheduled**.
- Locate the campaign; filter by **Template Name**.
- Click the campaign's **Trash icon** on the right to stop for all recipients.

6.2 Drafts

Campaigns that are created but not yet scheduled appear in this list.

- Access the **recipient list** by clicking the **number link**.
- Click **pencil icon** to **edit or schedule** the campaign.

Campaigns / Drafts							Video Help		
Search for Campaign Title							Q	▼	X
							Create New Campaign		
Campaign Name	Recipients	Number of Steps	Created On	Created By	Last Updated	Actions			
3 Step Campaign	24	3	April 28, 2016	Chris Spano	April 28, 2016	 			
Andrews Awesome Campaign	1	1	January 14, 2016	Andrew Agent	January 18, 2016	 			

6.3 Recently Sent

Completed campaign email steps appear in this list.

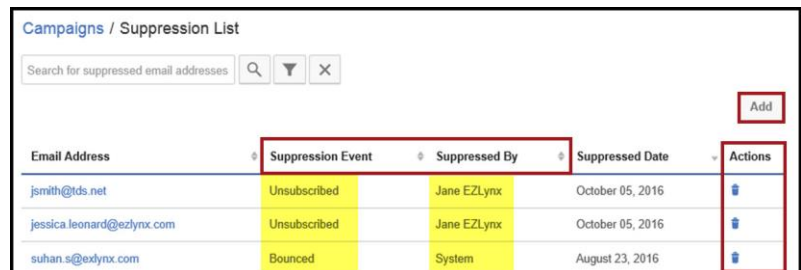
- Click a campaign title to view its details.
- View how many times emails were **opened (Open Rate)** or **clicked (Open Count)**.
- At Recipients, click number to view recipient data.

7 ♦ Suppression List

Email addresses can be added to the Suppression List in various ways. These range from the customer clicking unsubscribe inside emails, an EZLynx user manually adding the email address to the list, or the system may do this after emails bounce.

7.1 View the Suppression List

- Hover over **Communication Center icon**, and select **Suppression List**.
- Click any column header to sort - click again to sort in opposite order.



Email Address	Suppression Event	Suppressed By	Suppressed Date	Actions
jsmith@tds.net	Unsubscribed	Jane EZLynx	October 05, 2016	[Trash icon]
jessica.leonard@ezlynx.com	Unsubscribed	Jane EZLynx	October 05, 2016	[Trash icon]
suhan.s@exlynx.com	Bounced	System	August 23, 2016	[Trash icon]

7.2 Add Email to Suppression List

- From an **applicant's Details tab**:
 - Hover over the email's green checkmark; to view message.
 - Click green **checkmark** and land on **Suppression List page**.
 - Verify address, and click **OK**.
- From the **Suppression List page**:
 - Click **Add**.
 - Enter the email address, and click **OK**.



This email address is available for use with email marketing campaigns. Click here if you wish to add this address to the suppression list.

7.3 Remove Email from Suppression List



- From an **applicant's Details tab**:
 - Hover over the email's green checkmark; to view message.
 - Click **red "X"** and land on **Suppression List page**.
 - Click Trash icon, check consent box, and click **OK**.
- From the **Suppression List page**:
 - Use search field to locate email address.
 - Click **Trash icon**, check consent box, and click **OK**.

8 ♦ Add Custom Domain

Emails sent from EZLynx Communication Center attempt to display your email address in the "From" line. However, many emails display "mailer@email.ezlynx.com" instead. This might confuse some recipients or cause emails to be flagged as spam.

Add a Custom Domain - so that emails will display your email address instead of ours, and to improve your email deliverability.

NOTE: This is an advanced feature and requires technical understanding of how to add domain records.

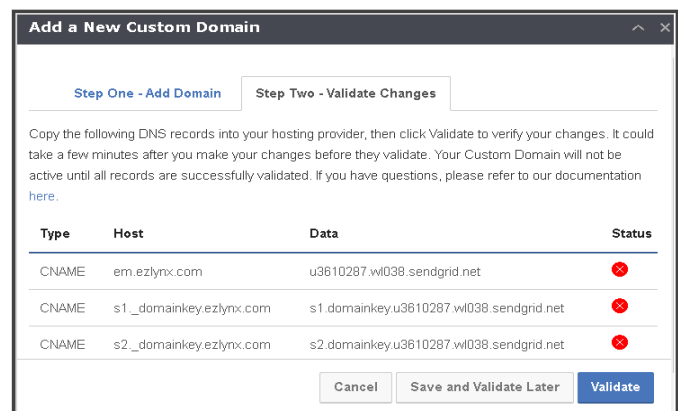
	EXAMPLE WITHOUT CUSTOM DOMAIN		EXAMPLE WITH CUSTOM DOMAIN
	from: mailer@email.ezlynx.com		from: you@yourdomain.com
	to: receiver@example.com		to: receiver@example.com
	mailed-by: email.ezlynx.com		mailed-by: yourdomain.com
	received-by: email.ezlynx.com		received-by: yourdomain.com

Quick Workflow

1. Add domain in EZLynx, and obtain CNAME records.
2. Add the CNAME records to agency's domain registrar's website.
3. Validate CNAME records in EZLynx.

8.1 Add Domain in EZLynx and Obtain CNAME Records

1. Hover over the **Communication Center icon**.
2. At **Email Campaigns**, select **Settings**.
3. Click the **Custom Domains tab** - if you don't have this tab, contact support@ezlynx.com.
4. Click **Add Domain**.
5. At **Step One**, enter the domain used for the agency's email addresses, and click **Next**.
6. At **Step Two**, these data records now must be added to your domain registrar's website.
7. Click **Save and Validate Later**.



Copy the following DNS records into your hosting provider, then click Validate to verify your changes. It could take a few minutes after you make your changes before they validate. Your Custom Domain will not be active until all records are successfully validated. If you have questions, please refer to our documentation [here](#).

Type	Host	Data	Status
CNAME	em.ezlynx.com	u3610267.wf038.sendgrid.net	✘
CNAME	s1_domainkey.ezlynx.com	s1_domainkey.u3610267.wf038.sendgrid.net	✘
CNAME	s2_domainkey.ezlynx.com	s2_domainkey.u3610267.wf038.sendgrid.net	✘

Buttons: Cancel, Save and Validate Later, Validate

8.2 Add CNAME Records to Domain Registrar's Website

Each domain registrar (the company that the agency used to purchase their custom domain) handles the process of adding CNAMEs differently, but the general process is the same.

EZLynx does not provide any support related to actually adding CNAMEs to the domain registrar's website. For this type of support, it is necessary to contact the domain registrar or the company that manages your agency's website.

This general process differs by domain registrar. Please contact the domain registrar for their specific steps.

1. Log in to your domain registrar account.
2. Find your domain.
3. Choose the option to edit DNS and/or add a CNAME record.
4. Enter the new records provided by EZLynx (underscores may need to be removed from the CNAMEs).
5. Save. This process can take up to 24 hours, and must be complete before continuing to the next step.

8.3 Validate CNAME Records in EZLynx

Once the CNAMEs are added and the process is complete on the domain registrar's website, return to EZLynx and validate the CNAMEs.

1. Hover over the **Communication Center icon**.
2. At **Email Campaigns**, select **Settings**.
3. Click the **Custom Domains tab**.
4. Locate the domain that was saved, go to **Actions** on the right and click **View**.
5. Click **Validate** - validation may take a few minutes.
6. Once complete, **Status icons** turn green.

Questions? Contact support@ezlynx.com.