Beginners Guide to OctopusEmail

Part of our Digital Foundations series

superhighways
harnessing **technology** for **community** benefit
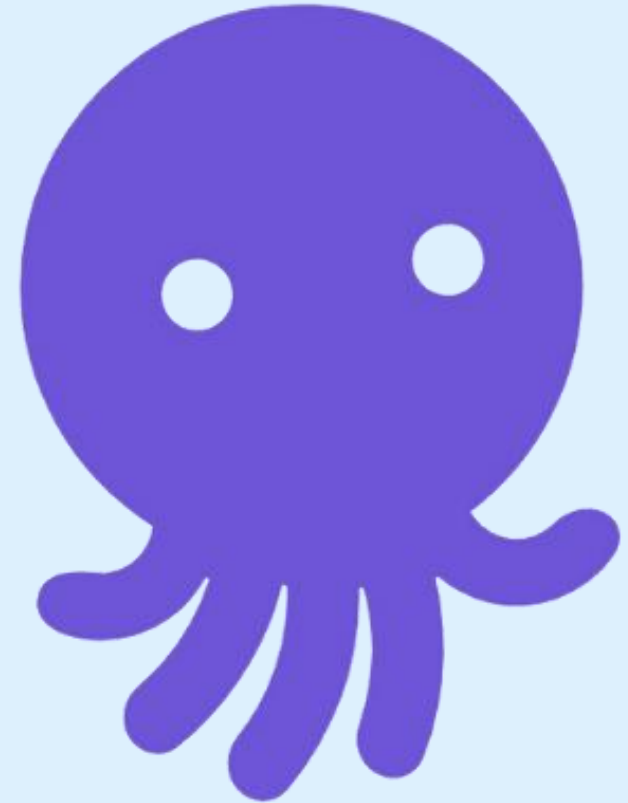
Digital Foundations programme

There are many ways we can help small community organisations make sound choices about the digital tools and technology they use.

Communications made easy

Raise your profile using digital tools to engage supporters and fund your future

Read more »

Digital basics

Work and collaborate online using free and affordable digital tools and technology

Read more »

Websites for communities

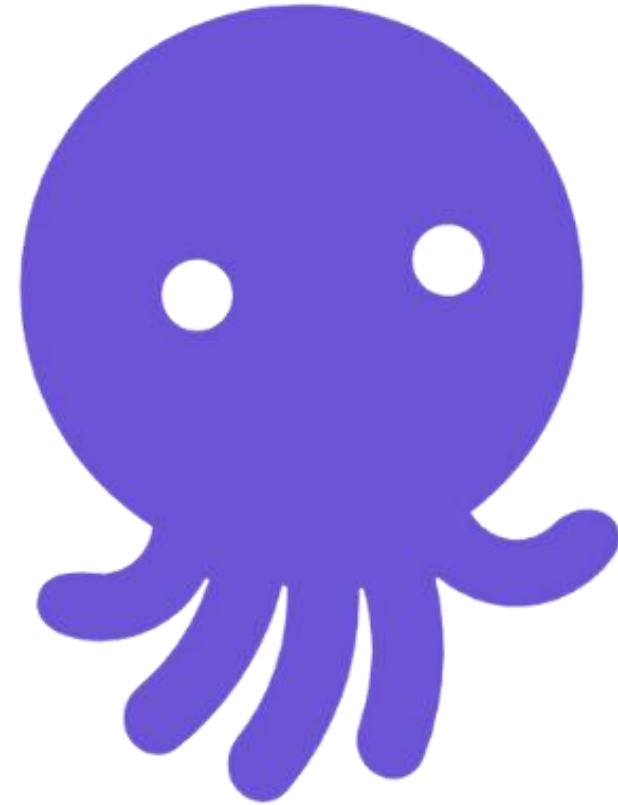Put your website at the heart of your charity or community organisation's story

Read more »

Find out more about the Digital Foundations programme

Today's goal

Learn how to set your account, manage your subscribers and send an email campaign.

What we will cover today

1. Logging in and moving around
2. Account set up
3. import and organise your subscribers (Superhighways)
4. create an email campaign
5. design your email
6. tips for sign ups and a quick look at forms

What we won't cover

1. Every option! e.g. automation
2. Paid for features

Demo and Do

✓ You'll watch me first.
✓ Then create or edit afterwards.
✓ 5 to 10 minute exercises
✓ Look out for the Octopus

What are the benefits of using OctopusEmail for you?

Free forever plan

✓2,500 subscribers

✓10,000 emails per month

✓EmailOctopus branding on emails

✓Reports available for 30 days

✓Create up to 3 landing pages and forms

✓Access for 1 user

Logging in and your dashboard

Let's go Live!

Logging in and dashboard overview

DEMO

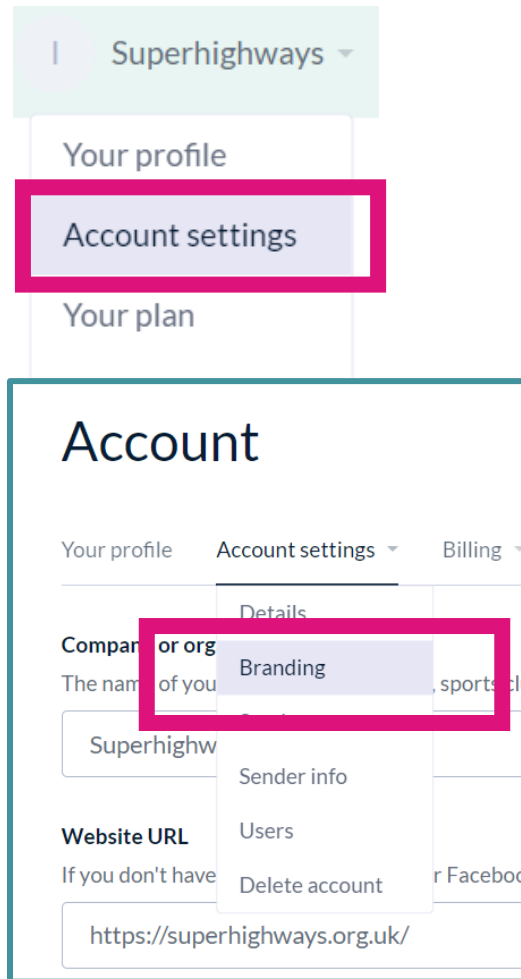# Account settings and branding

Let's go Live!

Account settings and branding

DEMO

Update your basic account details

1. **Go to your profile top right of screen** to access your account settings including Multifactor Authentication (MFA)

2. Change your main email address account details under *Your profile*

3. Go to *Account settings>Senders* to add additional 'from' emails

4. Go to *Account settings>Details* to add your website address and OctopusEmail account domain name

5. Go to *Account details>Settings>Branding* to add colours and your logo for consistent emails

Create your brand

Account

Your profile   **Account settings** ▾   Billing ▾   Integrations & API   Your rewards

We'll use your brand settings to create email, landing page and form designs.

Logo
Add up to five logos which can be quickly toggled when using the logo block in our drag and drop editor.

+

Primary colour
Your main brand colour. We'll use this by default for things like button colours.

+

Secondary colours
These will appear in your colour picker palette for quick and easy use.

+

Fonts and text appearance
Set your default font and font style for headers and body text.

Set heading style ✏

✓ Add up to 5 logos

✓ Add your main colour (primary)

✓ You can add an additional palette of colours

✓ Change your font for heading and body (paragraph) text

Create your brand from a campaign
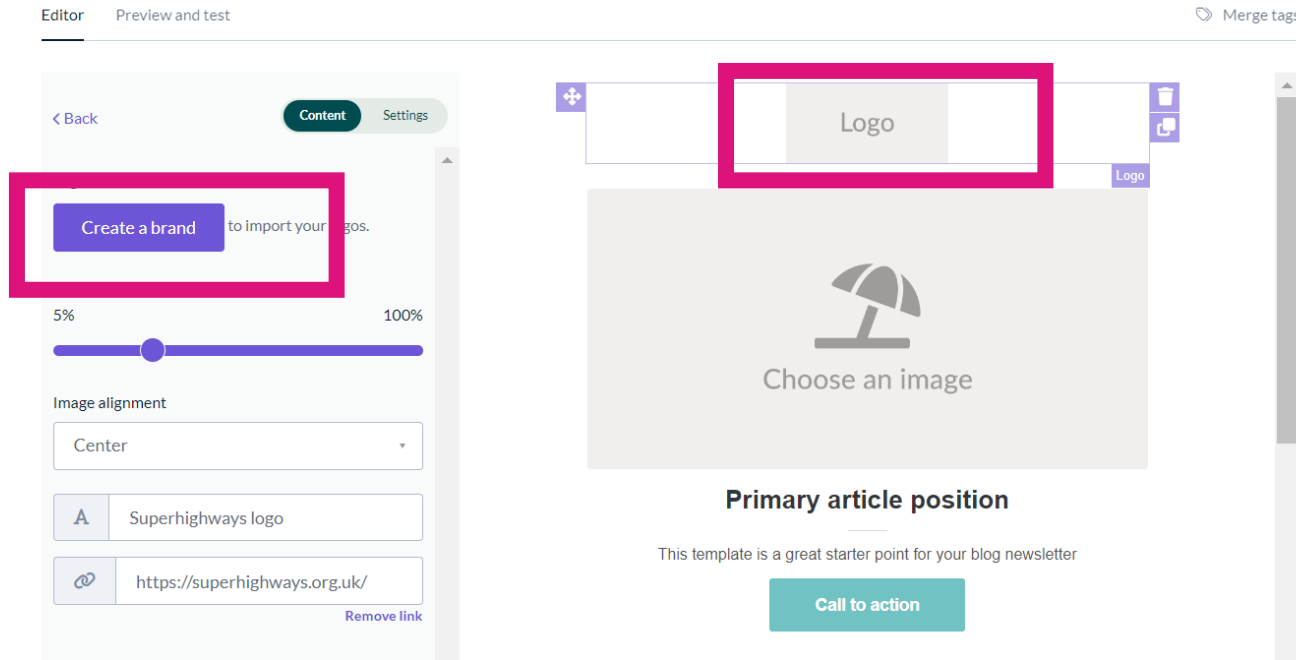
You may want to add your logo if you have one and haven't yet created a brand.

You can click on the logo and Create a brand. This will open your account settings in another tab in your browser.

How to create a brand in your settings

Build your list (s)

Lists

You can create multiple lists, each with their own contacts, fields and settings. We recommend starting with one.

Lists: enable double opt-in

Double opt-in

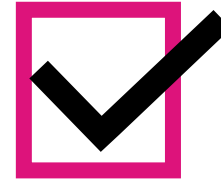Confirm that your subscribers want to receive emails

Enable double opt-in

No | **Yes**

Send contacts a confirmation email when they subscribe to your list

You don't have to enable double opt-in but it will help with GDPR compliance and better engagement.

Permission to email?

1. Make a note of the decisions you make at your organisation about when and how you record consent.

2. Do you have any instances of emailing using OctopusEmail for legitimate business purposes?

Let's go Live!

Creating a list

DEMO

Exercise: create a list

1. In your dashboard go to Lists
2. Click on Create list
3. A dialogue box will open
4. Give your list a name
5. Create
6. Now enable Double opt-in and change any details you like including the button colour

Create list

Name
This will help you identify your list later

Add contacts
- Import contacts from a file
- Add a single contact
- I'll do this later

Create

Let's go Live!

Searching for and adding a subscriber

DEMO

Individual subscriber (contact)

KW

Kate White
Added Dec 11 2023 at 4:48 PM, manually

Tags Staff ✕ +

Profile   ✏ Edit   🗑 Delete

Status	Subscribed
Email address	katewhite@superhighways.org.uk
First name	Kate
Last name	White

The unique identifier is Email Address

First name and last name are default fields. You will be able to see completed fields and tags

Exercise: adding a new subscriber

Add contacts ▾

Sorrel Parsons1

info@superhighways.org.uk

← Superhighways main mailing

Add contacts to Superhighways main mailing

Import contacts from a file   **Add a single contact**

Email address

First name
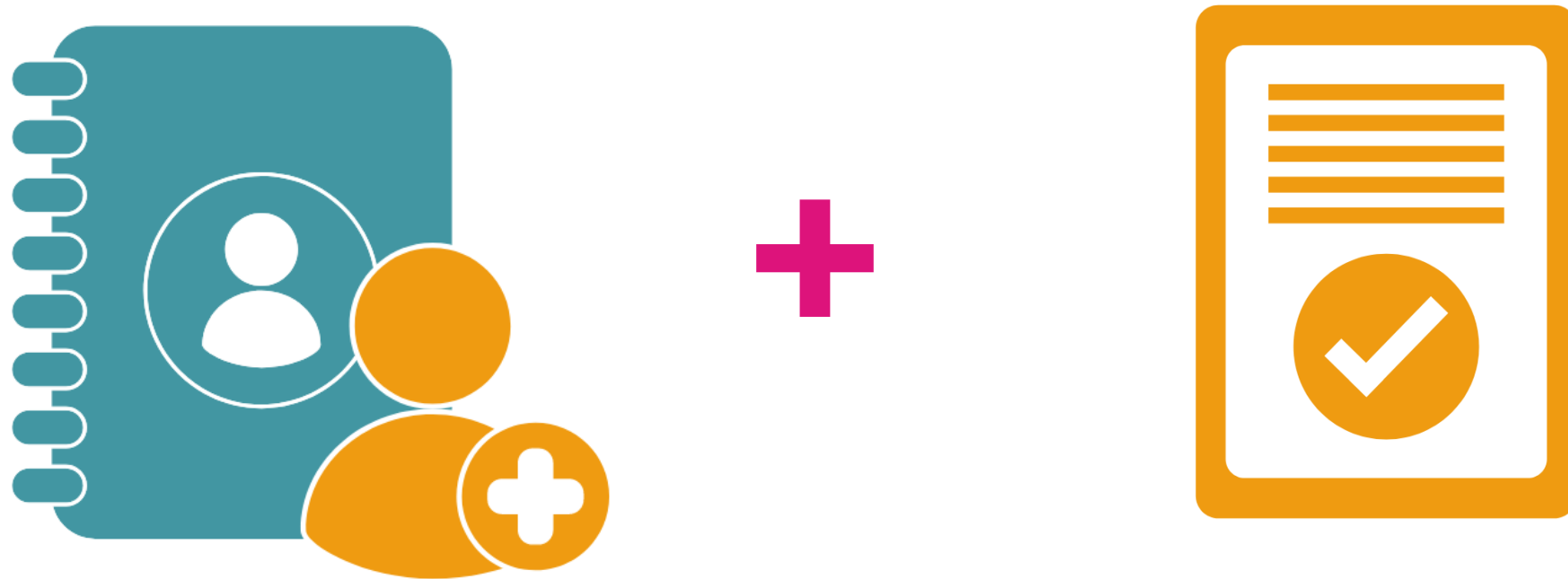
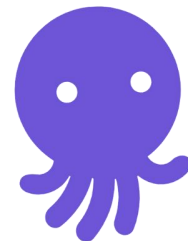**Last name**

Status

Subscribed

Tags

None   +

Add

Building your audience well

The best emails are ones sent to the right people with the content they want to see

How will you connect with your own audience? Do all of your subscribers need to see the same content?

Answers in chat

Ways to categorise your list

list fields:
basic info

Tags

internally
organise
your
subscribers

Fields

*Extra
information
to collect
about
subscribers

Segment

filter your
subscribers
based core
data + tags
& fields

*You can use fields to add your own information or ask individuals to complete these on a sign-up form.

Let's go Live!

Import contacts from a file

DEMO

Import contacts from a file

1. Open your list & add contacts
2. Import from a file
3. Drag or upload into the box

Add contacts ▼

Import contacts from a file

Add a single contact

We support files with an extension of `.csv`, `.dsv`, `.txt` or `.xlsx`.

Imported contacts will not receive a confirmation email, so make sure you have permission to add them.

What status should the contacts have?

● Subscribed

○ Unsubscribed

What should happen if a subscribed contact already exists in the list?

● Skip the contact

○ Update the contact (takes longer)

If someone has given you lots of information about themselves on a sign-up form, but then their email changes you may simply want to update the email manually and do not Update the contact
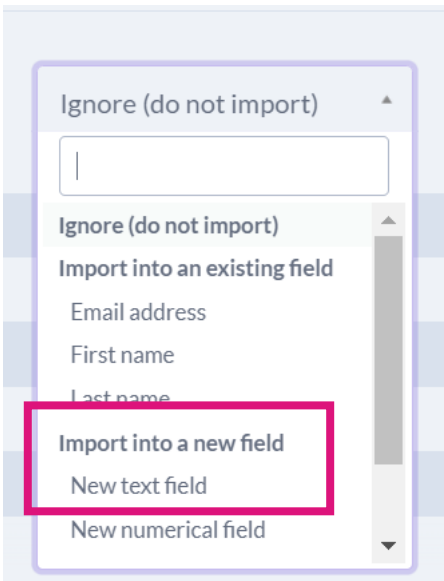
Next

Always use separate fields in your spread sheets.

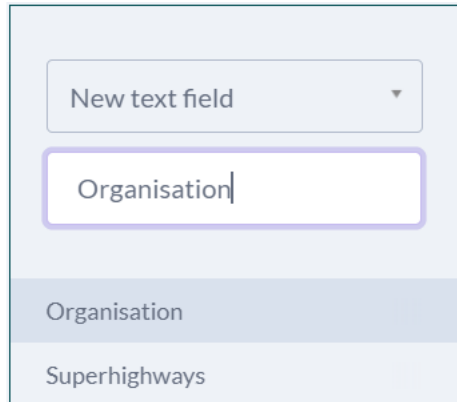You will now need to match up the fields from your import file to the ones in in your Octopus list.
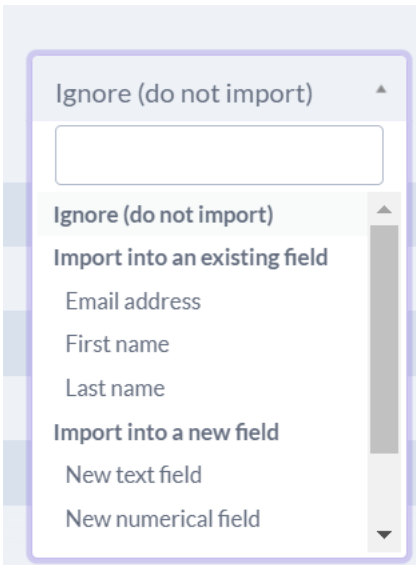
✓Click on the drop down by each field to match.

✓Choose the appropriate field.

✓You can add information to a new field at this stage

✓Scroll down to 'Import into a new field'

✓Choose a text, numerical or date field

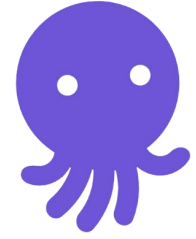✓Use text field for phone numbers (the system does not recognise 0 at the beginning)

✓You will n

✓You will need to give your field a name.

✓Click on import when you have finished.

Exercise: importing subscribers

1. Go to this Google Sheet
2. Go to File
3. Download
4. CSV or Excel format
5. Import file to your list

Adding and importing contacts

✓ Do you need / have permission?

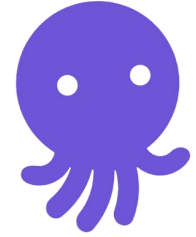✓ Do you have data protection & data privacy policy?

✓ If not, review!

Let's go Live!

Creating tags

DEMO

Exercise: creating tags

1. Go to your list
2. Open the Kate White contact, click on the plus sign by 'Tag'
3. Add the tag 'Manager'
4. Save
5. Go to Tags and create a new tag 'Superhighways'
6. Now go to your Contacts tab in your dashboard, tick all contacts and add to the Superhighways tag
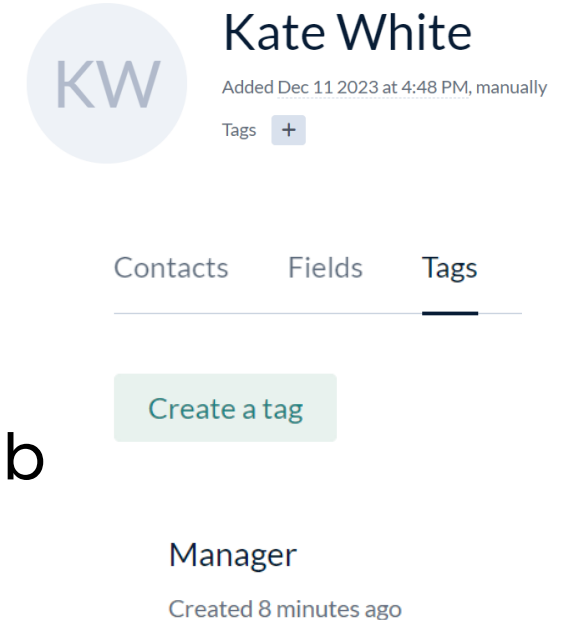
KW

Kate White
Added Dec 11 2023 at 4:48 PM, manually

Tags   +

Creating a tag

✓ There are lots of ways to create tags. You can:
  ✓ Add them to your import list
  ✓ Go to an individual contact and click on the plus sign
  ✓ Go to the Tags tab in your list

  ✓ Add multiple contacts from your Contacts tab in your dashboard to new or existing tags (next slide)

Adding contacts to an existing tag

1. Tick the contacts you want to add a tag to

Actions ▼   🔍 Search

⌄ Email address

KW   katewhite@superhighways.org....

☑   paulfirby@superhighways.org.uk

SP   info@superhighways.org.uk

SP   impactaloud@superhighways.o...

2. Click update tags

Actions ▼   🔍 Search

Update tags

Mark as unsubscribed

Delete

Export

3. Tick the relevant tags and Apply

Update tags for **3** contacts

🔍 Search or create new tag...

☐ Manager

☐ Staff

Apply

Let's go Live!

Unsubscribing a contact

DEMO

Unsubscribing contacts

Profile

✏ Edit   🗑 Delete

Status   Subscribed

Email address   info@superhighways.org.uk

First name   Sorrel

Last name   Parsons 2

Organisation   Superhighways
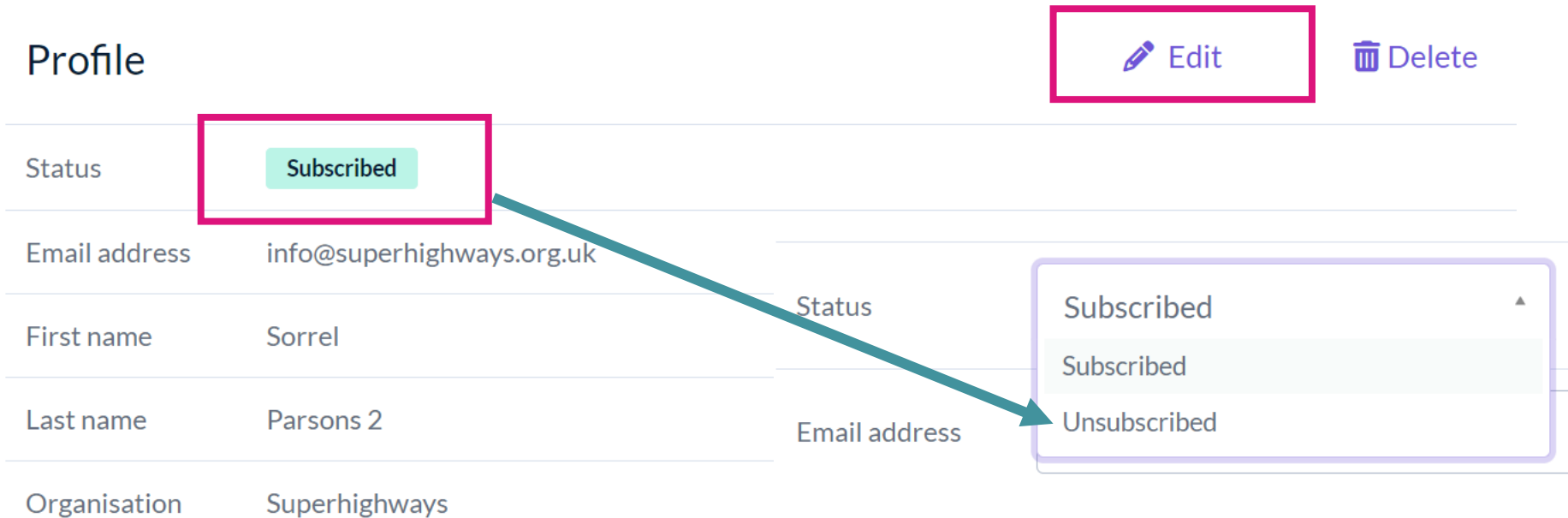
Status   Subscribed ▲
         Subscribed
Email address   Unsubscribed

You can go to an individual contact and unsubscribe.

Or tick the names of the people in your audience list, go to Actions and then Unsubscribe.

Unsubscribing versus deleting

Unsubscribed

✓Removed from specific list

✓Don't count towards total numbers

✓Retain personal data

✓Contact must resubscribe themselves

Deleted

✓Removed from specific list

✓Anonymous data in reports

Keep contacts up to date

Match [all ▾] of the following

| Contact activity ▾ | inactive and not added within ▾ | the last | 90 | days 🗑 |

+ Add filter

+ Add filter group

Matches 1 subscribed contact

Save

✓Steer clear of SPAM filters.

✓Are there people on your list that aren't really receiving your emails?

✓You can go to your list and create a segment to filter contacts that are inactive. Then email them or unsubscribe.

Design
your email

4

Email campaign objectives

Impacts on how you design & monitor results

Let's go Live!

Creating your email

DEMO

Step 1: Create a campaign

Untitled ✏ Edit

Sending from (name)
The name your emails will come from

Sending from (email address)
Send from and receive replies to this address

Subject
The email's subject line (merge tags are supported here)

Preview text
Typically displayed after the subject in a subscriber's inbox

Sending to

Choose a list

All subscribers

○ Setup — ○ Design — ○ Content — ○ Se[...]

Save & next

From: Someone they know and trust. Could be your org name

Subject: Short & simple

Preview text: A subtitle

To: Which mailing list?

You can choose to send it to the whole mailing list or a smaller part of it with a segment or tag. Personalising the 'To' field with merge tags can help you to talk to people directly

Sending to

| Superhighways main mailing ▼ | All subscribers ▲ |

All subscribers

Segments

New segment

Sending to

| Superhighways main mailing ▼ | New segment ▼ |

Match [all ▼] of the following

| Tags ▼ | has tag ▼ | Choose a tag ▲ | 🗑 |

Manager

Staff

ter

This is how you can send to specific tags or fields completed on your sign-up form.

Advanced settings

Advanced settings

Open tracking

Off | On

Find out who opened your campaign, and when they opened

Click tracking

Off | On

Find out who clicked the links in your campaign, which links were clicked, and when they were clicked

Google Analytics link tracking

Off | On

Automatically add UTM parameters to your links to allow tracking in Google Analytics

✓You will probably want to leave the Open and Click tracking options turned On. This is for your reporting. If you are not reporting you can turn these off. There is no point collecting data you don't use.

✓OctopusEmail suggest [adding their text] to your privacy notice to let people know.

Verify your domain
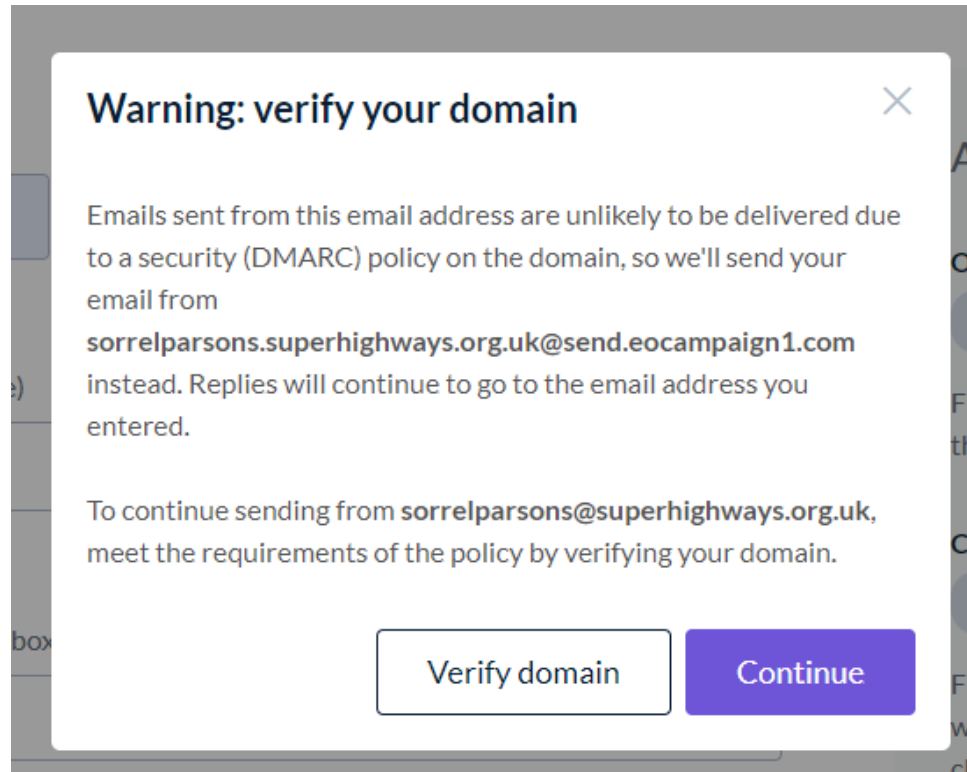
If you have a domain name for your organisation and associated emails you should verify your domain.

This will mean adding some information from your OctopusEmail account into your DNS records.

Verify your domain info

Step 2: Choose a basic template

Click on one of the basic templates to start. Or start from scratch. Both use the drag and drop editor.

You can use content blocks to break up text with images and more. So don't worry if the template isn't exactly what you wanted.

However, you cannot change the template once you have added content!

Exercise: Creating your first email

1. Go to the Campaigns tab
2. Edit the name of your campaign
3. Complete the from, to, subject line and preview fields
4. Click on Save and next
5. Choose a template to work with today

Let's go Live!

Add some content

DEMO

Step 3: Add or edit content blocks

Drag and drop a box from the left onto the right-hand column.

You can also click on items already on the page to edit the content block e.g. 'Choose an image'

Editor   Preview and test

Content   Rows   Settings

H1
Title

Text

Logo   Image

Logo

Choose an image
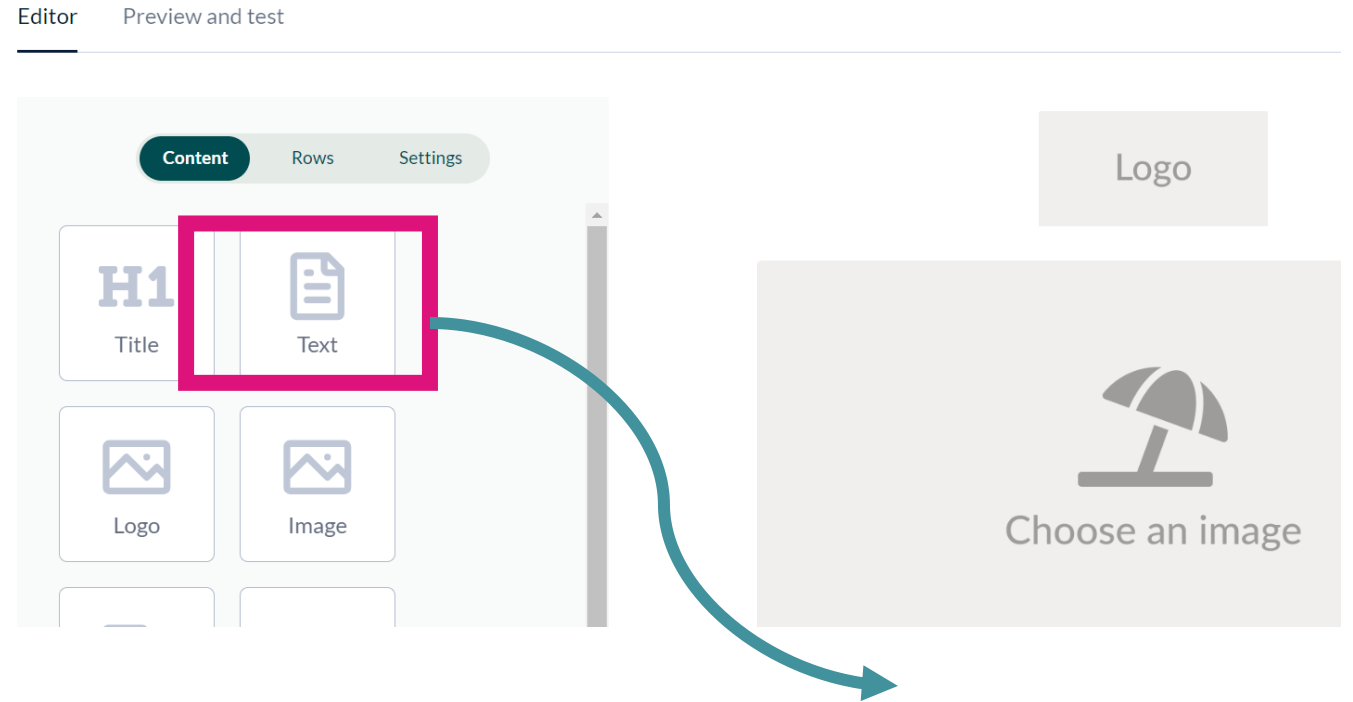
Add blocks above and below others

You can go back when you have finished making your edits to close the block

< Back

Content   Settings

Image

Choose an image

Change image

Image width

5%   100%

Image alignment

Center
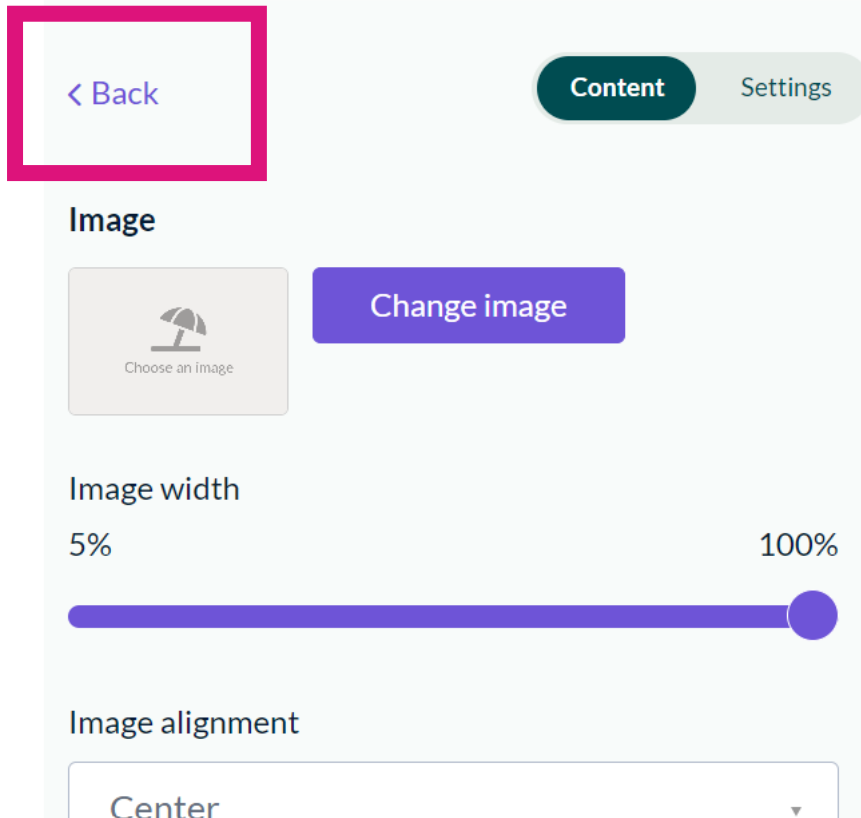
✓Click on any content block on the page and the editing pane will open up on the left.

✓Alignment, colours and other elements will depend on the type of block you are adding.

✓Don't forget to check your settings for the block too, where you will find margins and background colours.

Content   Settings
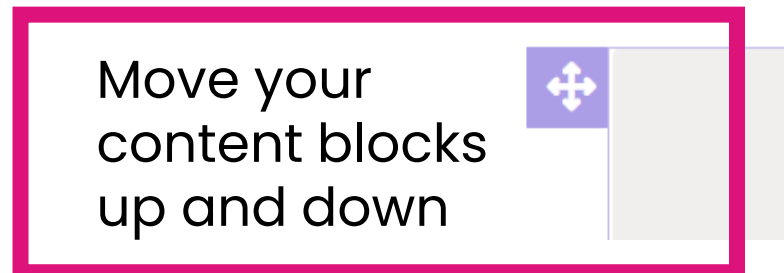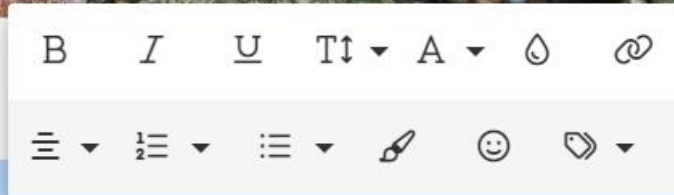
Move your content blocks up and down

Highlight the text you want to edit to access the toolbar to change the font, add bullet points or add links to websites.

Some fonts are not always supported by different people's email clients e.g. gmail, Hotmail, Outlook etc.

Your email may use a substitute font from OctopusEmail.

Info about fonts

Delete content blocks

✓Click on the bin icon on the right-hand side of the block

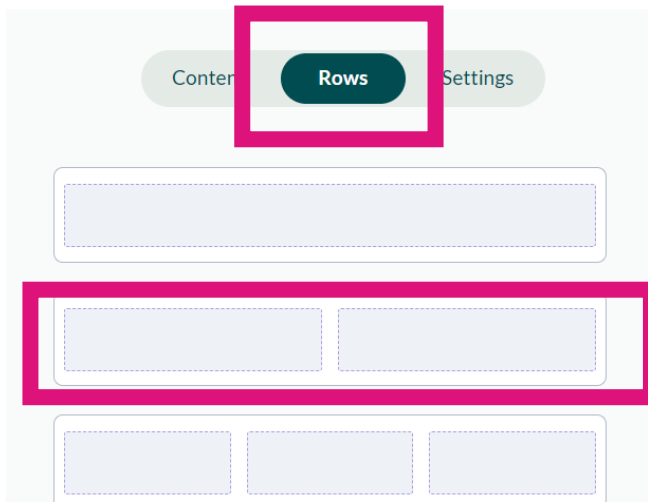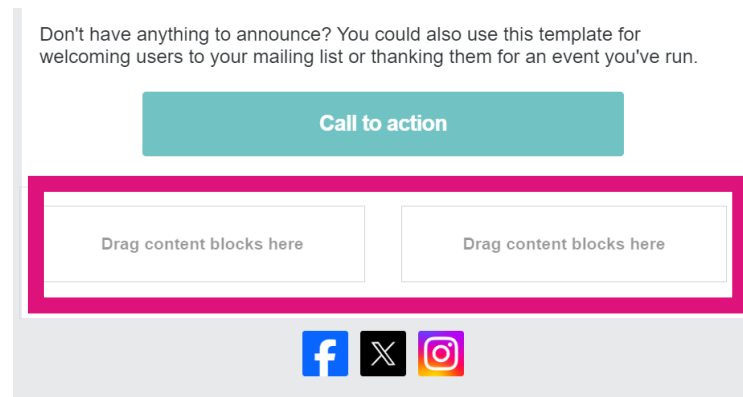✓EmailOctopus will ask you if you arte sure before it is deleted. You cannot undo the action
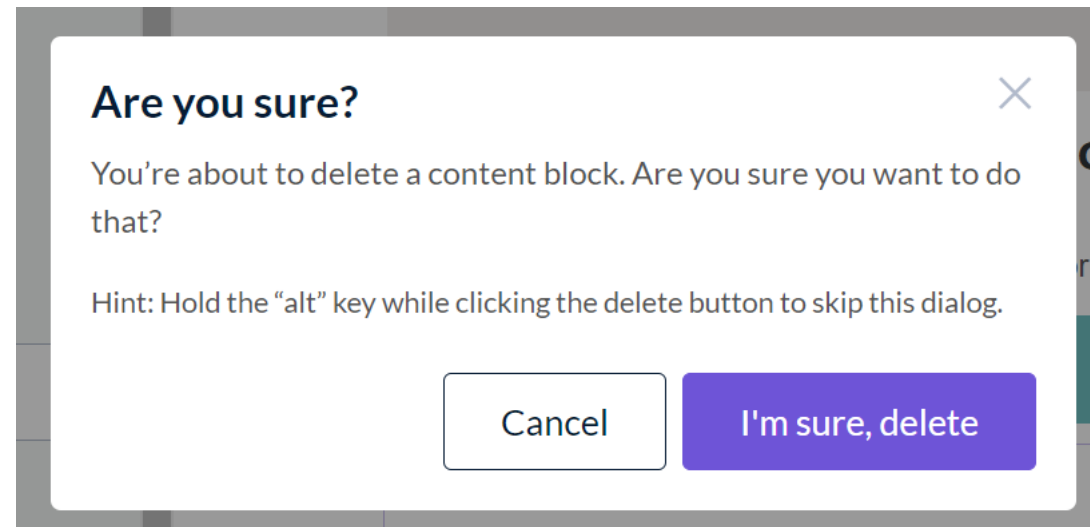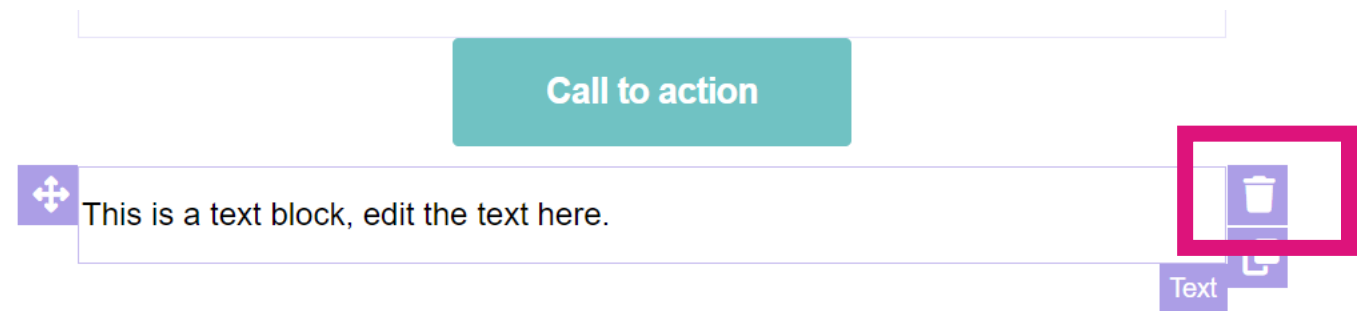
Creating layouts with Rows

You can use rows to create columns and more dynamic designs where needed.

1. Click on Rows and choose a Row style. Drag it where you want it on the page

2. Click back on Content and choose Content blocks to the empty boxes in the row
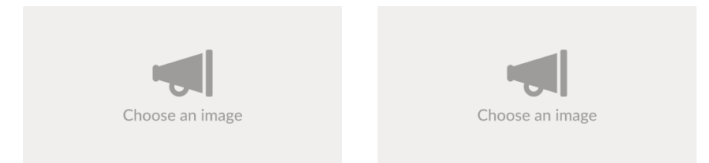
3. Now you can choose what to add e.g. images.

Merge tags

Merge tags   ✕

Use these tags to add dynamic content to your email. For more advanced options, see our full customisation cheat sheet.

Contacts

{{ID}}	The subscriber's unique ID.
{{EmailAddress}}	The subscriber's email address.
{{FirstName}}	The subscriber's first name.
{{LastName}}	The subscriber's last name.
{{Organisation}}	Custom field.

Links

{{UnsubscribeURL}}	A link to a page where your subscriber can unsubscribe.
{{WebVersionURL}}	A link for your subscriber to view the email in their browser.
{{RewardsURL}}	A link back to EmailOctopus, required on our free Starter plan. Earn $15 credit for every paid user you refer!

Info

{{SenderInfo}}	Your physical address.
{{SenderInfoLine}}	Your physical address on a single line.
{{TimeToRead}}	Estimated time to read the email. Formatted as *n minute(s)*.

A common merge tag you may wish to use is First name.

Copy the bracketed information exactly, including the brackets and add in a text box at the top of your email e.g. Dear {{FirstName}}

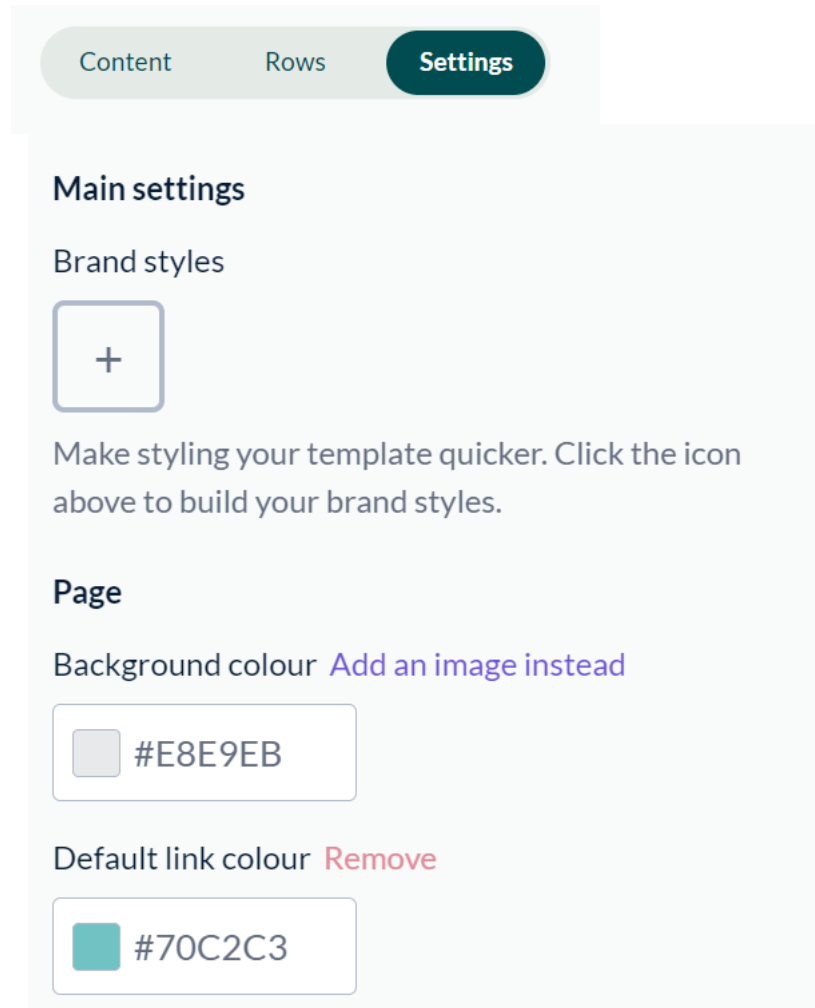This will add the first name of your contact to the email that they receive.

Let's go Live!

Create your style

DEMO

Step 4: Check your style in Settings

You can go into the Settings tab in your campaign to control the overall look and feel of your campaign. This is quicker than changing the colour or font of every block.

If you have created your brand you can simply click on the plus sign under brand styles to add your normal fonts and colours.
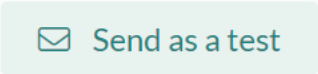
Exercise: Adding content

1. Use the drag and drop editor to introduce your organisation or tell the team about an event you have.

2. Add at least:
   1. One image
   2. Some text
   3. A heading
   4. A row with a different layout and some content added.

It doesn't have to be perfect!

Step 5: Preview, test and send

✓ Switch to Preview and test mode to see how your email appears on a desktop or mobile device and check any links to websites you have added.

✓ Send as a test email for to up to 10 people

Ready to send?

Ready to go!

One last chance to review your campaign before clicking send.

Delivery

◉ Send immediately

◯ Send at a specific time

To

✎ Edit

Superhighways main mailing – All subscribers (4 recipients)

✓Choose whether to send now or at a specific time.

✓Check your subject line and who the email is coming from. You can edit these before sending if needed.

Share a link to a sent campaign

Your campaign is on the way

High five! Feel free to leave this page – we'll carry on without you.

View or share your campaign with others:

https://eocampaign1.com/web-version?p=e7dc8c58-42af-11e

✓You can copy the link as soon as you have pressed Send.

✓Or share to social media

Exercise: Preview, test and send

1. Preview
2. Send a test if you have time
3. Make any last changes
4. Send your campaign

Please don't worry about what this looks like! They're going to me or colleagues that know you are beginners.

Sign up forms

5

What should be on a form?

Newsletter

Subscribe

Consider...

✓ What do I need the individual to complete?

✓ What don't I need because EmailOctopus collects it automatically

✓ What do I genuinely need?

Start building your form

Let's go Live!

Creating a sign up form

DEMO

Landing pages & forms

Go to Landing pages & forms tab. Click on Create to get started. Select the Forms tab. If you want to paste the form onto a webpage on your website or send a link to it, use the Inline style.
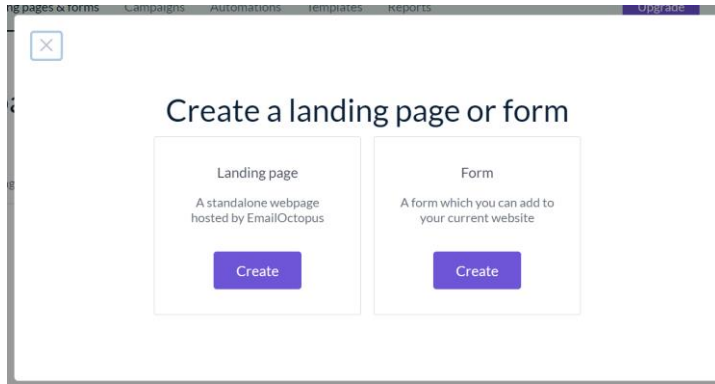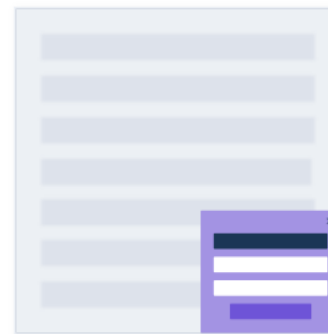
1. Choose Form
2. Inline is the most common style

You may need to click on the field boxes to add Available fields. You must set up additional fields in your List first before they are available for a Form.
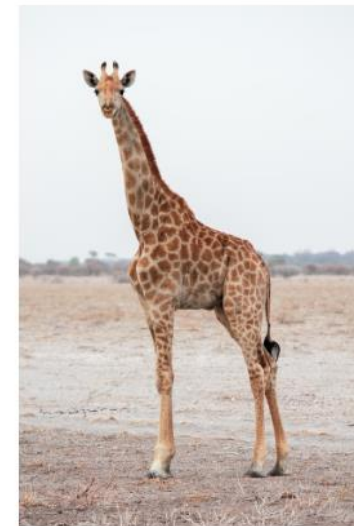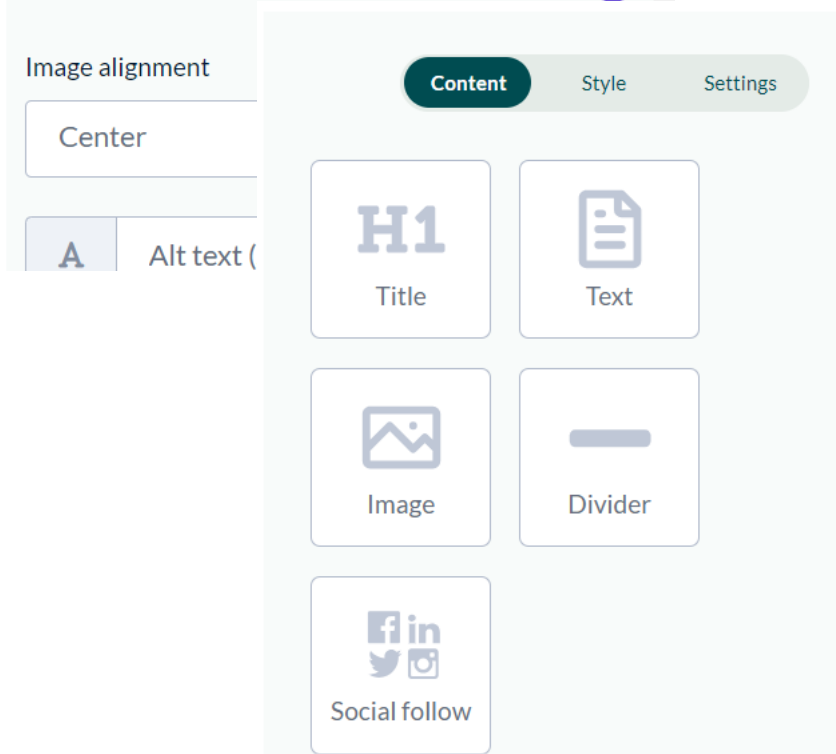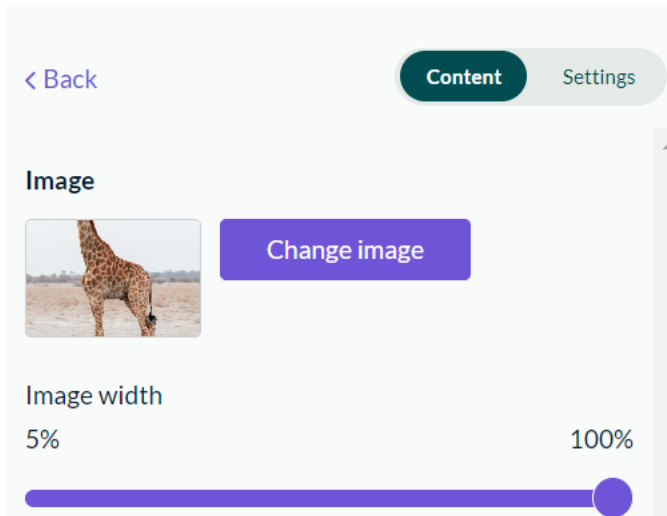
You can edit any content blocks in the Form and add additional Content blocks.

The drag and drop editor is the same as the one for your campaigns. It has less content blocks available: Title, Text, Image, Divider and Social follow

Embed the form on your website

Don't forget to save!

Then add the form's code to your website: </> Add to your website   Save

Add this form to your website   ×

Place this line of HTML code wherever you want the form to appear.
Read our our documentation if you're unsure how.

<script async src="https://eocampaign1.com/   Copy

Copy the code.

On your website you will need to look for a HTML or Embed button <> to paste this code correctly.

Get more people signed up....

✓ Link to your sign-up form for your list
✓ Embed it on your website
✓ Use the link in an email signature for all staff
✓ Use the link in your social media
✓ Think about all your contact points
✓ Verify your domain

Any final questions?

Next steps

5

Book on training

OctopusEmail

Knowledge Base includes how to videos
E-mail marketing 101 webinar

Superhighways training

Our full training programme will re-run soon
Full training programme

Superhighways support

Book a 1:1 to help you send your email
campaigns
sorrelparsons@superhighways.org.uk

What does Superhighways do?

Superhighways helps small charities and community groups gain essential digital and data skills backed by the right tech to achieve their goals.

Thanks for taking part

Sorrel Parsons
sorrelparsons@superhighways.org.uk
www.superhighways.org.uk