

How to Send an Email Campaign

The Email Campaign Wizard in the GuestBridge Administration application allows you to set up and send an email campaign if you have the GuestBridge Online Module. The wizard will help you create an email from scratch, or you can use an HTML file you already have. The system will walk you through each step, from selecting the recipients to actually sending the email.

To reach the Email Campaign Wizard, either click on *Guest* and then *Email Campaign...*, or click

the button that looks like this: .

The system will remind you that you must have an active Internet connection for this feature. If you have not synchronized with the GuestBridge server in a while, the system will ask you to contact GuestBridge Technical Support (414-918-7550 or 866-785-7711) before you proceed with the email campaign. After your connection and synchronization status is verified, the Email Campaign Wizard will appear.



Figure 1 – Email Campaign Wizard

Send an Email Campaign

1. **Set Up the Email Send Criteria** – Select the date and time you would like the email to be sent. Since you will have to approve a test email, it is recommended that you choose a time at least 30 minutes in the future.
 - a. In the TYPE OF CAMPAIGN field, select what kind of email you are sending – this data is compared to guest contact permission levels when determining the recipient list.
 - b. In the RETURN ADDRESS field, enter the email address you would like to appear as the sender. All replies will be sent to this address.
 - c. In the SUBJECT LINE field, enter the text you want to appear as the subject line in the recipients' email in boxes.
2. **Attach an Existing HTML File** – If you have a file you wish to use as the body of the email, enter the file name in the E-MAIL MESSAGE FILE field (or use the folder button to browse for your file) and click *Edit* to view your HTML. The EDIT MESSAGE window will appear.

3. **Create the Email Text** – If you do not have a file already created, click *Create* to write your email. A window will appear showing you the options for automatically adding links to your email. All of the selections will be checked as default, so uncheck any you don't want. Click *OK* to move to the next screen. The *EDIT MESSAGE* window will appear.

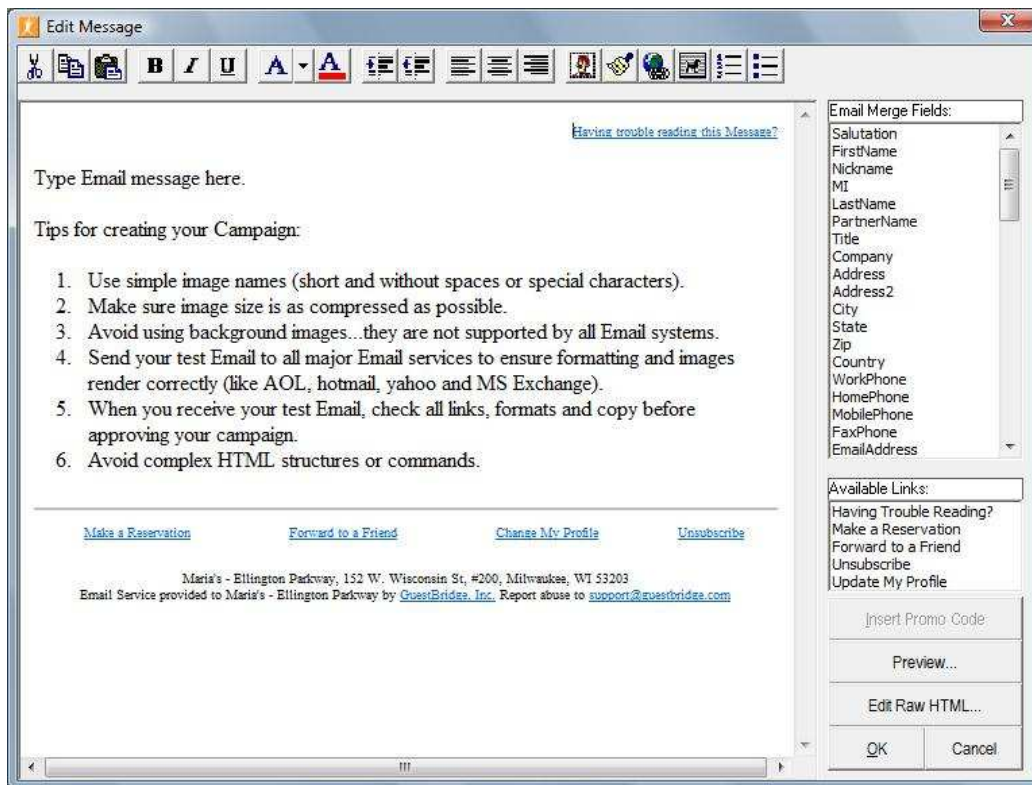


Figure 2 – Edit Message Window

In the *EDIT MESSAGE* window, carefully read the instructions listed. Once you're ready, highlight the text of the instructions and delete them. Type the text of your message. You can insert data fields by clicking on them from the list at the right to personalize your message to each recipient. Use the buttons along the top of the *EDIT MESSAGE* window to format your text, change the background color, and insert images, such as your logo.

Note: The federal CAN-SPAM law requires an unsubscribe method and the sender's physical address, among other items. GuestBridge is providing you with a template that is compliant with the CAN-SPAM law. However it is your responsibility as the sender to ensure that the final email is compliant.

4. **Close the Edit Message Window** – Click *OK* when you're done. The words "in memory" will appear in the *E-MAIL MESSAGE FILE* field of the *EMAIL CAMPAIGN WIZARD* window. Click *Next*.
5. **Filter by Category** – If you want to send an email only to guests with one or more categories, check the box next to *ONLY THESE CATEGORIES*. The category list will become active and you can select the one(s) you wish to send the email to. Use *Select All* to highlight all of the categories. When you have finished your selection, click *Next*.
6. **Select Filter Criteria** – If you do not want to send the email to your entire guest list, use this window to define the categories of guests you wish to send to. Criteria include *VIP*

status, birthday, anniversary, date of first visit and seasonal guest status. When you have finished your selection, click *Next*.

7. **Review the Recipients** – The list of guests meeting your criteria will be displayed in the field to the right. The total number of names in the list is displayed at the bottom of the window. To remove one or more names from the list, highlight the name(s) and click *Remove*. To select all names for removal, click *Select All* and then *Remove*.
8. **Attach a Category to the Recipients** – If you'd like to track the recipients of this email, you can assign a category to them which will be dated with the email sent date. Check the box next to ATTACH CATEGORY TO GUEST RECORD. The list of categories that can have dates assigned to them will be displayed. If you wish to create a new category, enter the category's name in the empty field and click *Add Category*. The new category will move into the list on the right. Select the category you wish to assign to the email recipients and click *Next*.
9. **Test Email Addresses** – Enter the email addresses, separated by a semicolon (;) that you wish to receive, review, and approve the campaign. This option allows you to see your email in a variety of formats on any different computers and browsers you may have available to you, and to cancel it before it goes out if you find any errors.
10. **Send Email** – Click *Send*. A confirmation message will appear telling you how many emails have been queued up for processing. When the emails are sent, a confirmation message will be sent to the return email address you specified earlier.
11. **Approve Campaign** – Test emails are sent immediately to the list of email addresses you defined when you set up this campaign. The email will appear exactly as it will appear to the recipients, with the addition of two links at the bottom: "Click here to APPROVE this campaign" and "Click here to CANCEL this campaign". When you know you wish to approve or cancel the campaign, click the appropriate link.
 - The approval emails will continue to be sent every 4 hours until one of the recipients clicks on either the *Approve* or *Cancel* link.
 - Multiple people can click on the *Approve* link, but the system requires only one approval before the campaign is sent out.
 - If one recipient clicks on the *Cancel* link, this overrides any clicks on the *Approve* link, even if the *Approve* link is clicked after the *Cancel* link is clicked.
 - If the campaign is canceled, you will have to set it up again using the EMAIL CAMPAIGN WIZARD in order to approve it and send it out.

If you have any questions, please contact GuestBridge.

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