

PARDOT: HOW TO CREATE AND SEND AN EMAIL



1. To begin, type pi.pardot.com into your browser. You will be prompted to put in your login information then presented with this screen upon logging in.



salesforce pardot

?

Dashboard

All Prospects

Date Range (Based on 12am EST):
Last Week

Date	Prospect Count
2/18	158,500
2/19	159,394
2/20	159,394
2/21	159,394
2/22	159,394
2/23	159,394
2/24	159,394

Prospects Created	954
Conversions	0
Opportunities Created	0
All Prospects	159,394

Marketing Calendar

[Create New Event](#)

SUN	MON	TUE	WED	THU	FRI	SAT
	23	24	25	26	27	28
	1	2	3	4	5	6

[View Full Calendar »](#)

Active Prospects for Review

NAME	COMPANY
SGT Michael Ridge	

Identified Companies

COMPANY	LOCATION
Dnic-asblk-01451	Hope Mills, NC, United States



2. To begin a new message, start by hovering over “Marketing” in the blue bar all the way to the left. Hover over “Emails”, then select “New List Email” at the bottom.

The screenshot displays the Pardot Marketing interface. The left-hand navigation menu is highlighted with a red box. The 'Marketing' menu item is selected and expanded, showing a list of options. The 'Emails' option is highlighted with a red box and a circled '2'. The 'Emails' menu is further expanded, showing a list of options. The 'New List Email' option is highlighted with a red box and a circled '3'. The background shows a dashboard with various charts and data points.

Marketing ①

- Folders
- Automation
- Calendar
- Campaigns
- Content
- Emails ②
 - Drafts
 - Scheduled
 - Sent
 - A/B Tests
 - Templates
 - Tests
 - Preferences Page
 - Unsubscribe Page
 - New List Email ③
 - New Email Template
- Engagement Studio
- Forms
- Landing Pages
- Search Marketing
- Segmentation
- Site Search



3. After selecting “New Email List”, you will be presented with this screen. Fill in the name of your message’s name, folder, and campaign.

Basic Email Information

Name * **Chapter #, Chapter Name, Email Name, Date (Ex: 4401 Alamo Test Email April 20)**

Folder * **Double click "Chapters" then search for your chapter**

Campaign * **Generic for all chapters Select "Chapters Campaign"**

Email Type *

- HTML and Text**
This email will be an HTML email with a text alternative.
- Text**

4. After clicking “Save”, you will be presented with templates. Select “Chapters-Basic” then “Apply”.

A screenshot of a web interface titled "Templates" with a search bar labeled "Search by name...". The interface displays a grid of template cards. The card for "Chapters - Basic" is highlighted with a red border and a small white box containing the number "1". A yellow callout box with red text points to this card, stating "Use 'Chapters - Basic'. We will let you know when new templates are available." At the bottom right, there are two buttons: "Skip" and "Apply", with the "Apply" button highlighted by a red border and a small white box containing the number "2". Other visible template cards include "ARMY Magazine", "AUSA Extra", "AUSA's Five Things", "AUSA's Five Things - 2 ads", "Chapter Leaders - News You Can Use", "Chapter Leaders - News You Can Use - Copy", and "Chapters - Basic - Copy".

Templates

Search by name...

ARMY Magazine

AUSA Extra

AUSA's Five Things

AUSA's Five Things - 2 ads

Chapter Leaders - News You Can Use

Chapter Leaders - News You Can Use - Copy

Chapters - Basic

Chapters - Basic - Copy

No Preview Available

Use "Chapters - Basic". We will let you know when new templates are available.

Skip Apply

LAYOUT

The three main sections are “Building”, “Testing”, and “Sending” (Red)
Within “Building”, there are 3 subsections we will use: “Editor”, “Preview”, “Text” (Blue)
Do not edit anything in “HTML”



1 BUILDING 2 TESTING 3 SENDING

A EDITOR </> HTML B PREVIEW C TEXT

Chapter Newsletter | View in browser

Info History

1 BUILDING 2 TESTING 3 SENDING

A EDITOR </> HTML B PREVIEW C TEXT

Chapter New

Insert Your Headline Here

Dear %%FIRST_NAME%%,

Save Cancel

1. Building
a. Editor
b. Preview
c. Text
2. Testing
3. Sending

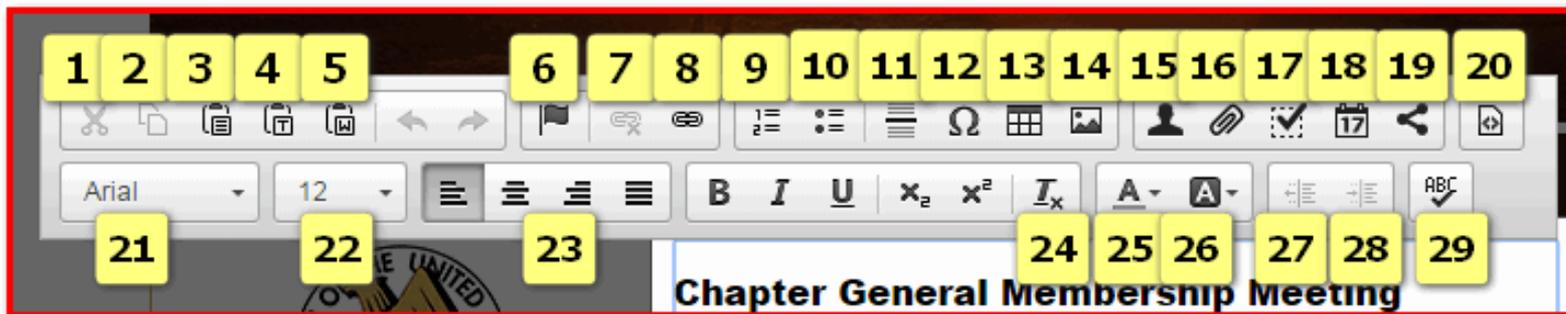
6. After selecting your template, you will start in the subsection of “Building”, “**Editor**”. In “Editor” the screen will be divided in half. The left is where you click on the section you would like to edit. The right is where you will do the actual editing.



The screenshot displays the Pardot Content Editor interface. At the top, there is a search bar and navigation tabs for "test", "BUILDING", "TESTING", and "SENDING". The "EDITOR" tab is highlighted with a red box. Below the tabs, the interface is split into two main sections. The left section, outlined in blue, shows a preview of a newsletter template. It includes the "ASSOCIATION OF THE UNITED STATES ARMY" logo, a header area, a large image placeholder with the text "Insert Your Headline Here", and a personalized greeting "Dear %%FIRST_NAME%%,". The right section, outlined in green, is the "Content Editor" for the selected section. It features a rich text editor with various formatting options (bold, italic, underline, link, etc.) and a text area containing the same logo and text as the preview. A "Save" button is located at the bottom right of the editor.

Guide to WYSIWYG (Toolbar)

- | | | |
|---------------------------------|-------------------------------|----------------------|
| 1. Cut | 11. Insert Horizontal Line | 21. Font |
| 2. Copy | 12. Insert Special Character | 22. Font Size |
| 3. Paste | 13. Insert Table | 23. Align |
| 4. Paste (Plain Text) | 14. Insert Image | 24. Remove Format |
| 5. Paste from Word | 15. Insert Personalized Field | 25. Text Color |
| 6. Anchor | 16. Insert Link | 26. Background Color |
| 7. Unlink | 17. Insert Survey | 27. Decrease Indent |
| 8. Link | 18. Insert Event | 28. Increase Indent |
| 9. Insert/Remove Numbered List | 19. Insert Share Link | 29. Spell Check |
| 10. Insert/Remove Bulleted List | 20. Edit Source HTML | |

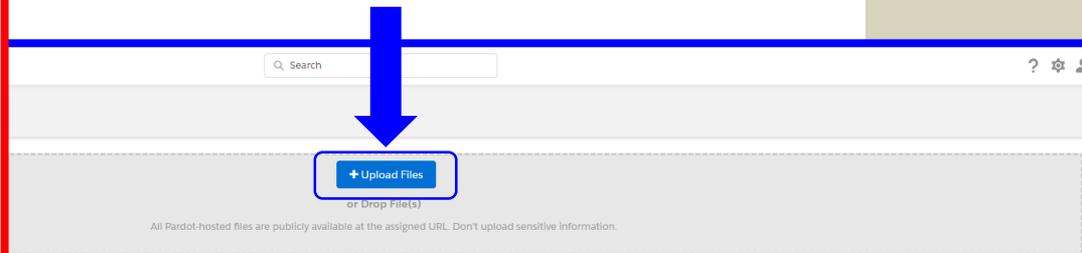
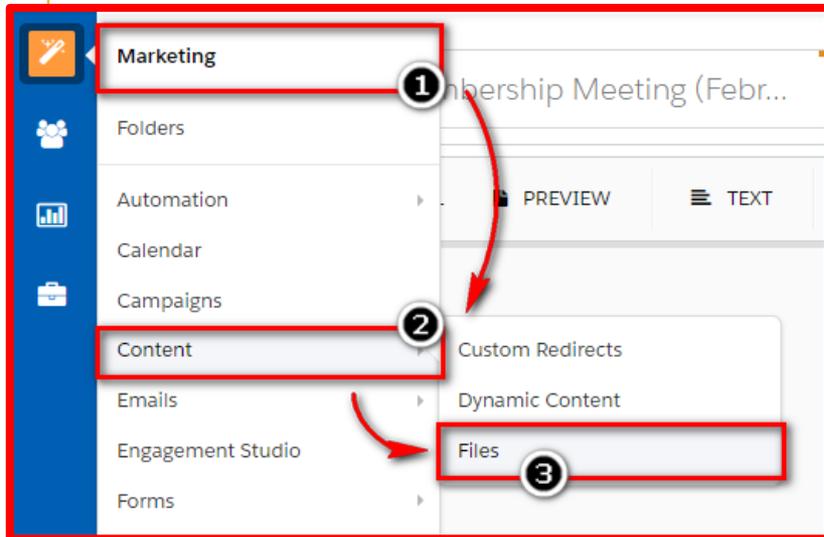


HOW TO ADD A FILE PT. 1



If you have any attachments you would like to add to your message, you may add them in Pardot either before starting your message or during.

To begin, go to Marketing → Content → Files (left). This will take you to the screen you see below. Click on the blue rectangle towards the top that says “Upload Files”.



Tags▼

+ Add File Tools▼

NAME	SIZE	LOCATION	SHORT URL	UPDATED	ACTIONS
youtube@2x.png /Uncategorized/Files	1.50 KB	https://info.usa.org//784783/2...	Generate	Nov 26, 2019 7:03 PM	⚙️
USAREC_BDE_Directory_23Jan20.pdf /Uncategorized/Files	3.25 MB	https://info.usa.org/usarec.bri...	Generate	Feb 14, 2020 9:59 AM	⚙️
Updated_2020_Individual_Awards_Ballot_with_Revised_... /Uncategorized/Files	414.83 KB	https://info.usa.org/2020.award...	Generate	Feb 28, 2020 5:40 PM	⚙️
twitter@2x.png /Uncategorized/Files	1.64 KB	https://info.usa.org//784783/2...	Generate	Nov 26, 2019 7:03 PM	⚙️
twitter1.png /Uncategorized/Files	1.72 KB	https://info.usa.org//784783/2...	Generate	Nov 26, 2019 7:17 PM	⚙️

With 0 selected: [▼] Go

** Currently using 57.55 MB of 500 MB (11.5%)

Showing 5 of 89 Page 1 of 18 Next▶

HOW TO ADD A FILE PT. 2



After clicking 'Upload Files' you will be prompted to select your desired file from wherever you have saved it on your computer. Once you have found your file, either double click on your file or click once then "Open" to select and upload.

The screenshot shows a file upload process. On the left, a Windows File Explorer window is open, displaying a folder named 'BOBST' containing several files and folders. The file 'Example.docx' is selected. On the right, a web browser window shows the 'Upload Files' section of a website. The 'Upload Files' button is highlighted. Below it, a table lists uploaded files with columns for LOCATION, SHORT URL, UPDATED, and ACTIONS.

LOCATION	SHORT URL	UPDATED	ACTIONS
https://info.ausa.org/1/784783/2...	Generate	Nov 26, 2019 7:03 PM	⚙️
https://info.ausa.org/usarec.bri...	Generate	Feb 14, 2020 9:59 AM	⚙️
https://info.ausa.org/2020.award...	Generate	Feb 28, 2020 5:40 PM	⚙️
https://info.ausa.org/1/784783/2...	Generate	Nov 26, 2019 7:03 PM	⚙️
https://info.ausa.org/1/784783/2...	Generate	Nov 26, 2019 7:17 PM	⚙️

HOW TO ADD A FILE PT. 3



HOME > MARKETING > CONTENT
Files

+ Upload Files
or Drop File(s)

All Pardot-hosted files are publicly available at the assigned URL. Don't upload sensitive information.

"Example.docx" was successfully uploaded.

Example.docx **(edit)**

Location: <https://info.ausa.org/l/784783/2020-03-03/hby5/784783/26510/Example.docx>

Short Url:

Folder: /Uncategorized/Files

After uploading you will be directed to the screen above. ↑
Click '(edit)' to the right of your documents name.

You will then be directed to an overview page of the file. Click 'Edit file' in the top righthand corner. →

Edit file View file View report ▼



HOW TO ADD A FILE PT. 4

After clicking 'Edit file' you will be directed to this page.

Name: Change the file's name to follow our naming convention (ex: 4401 Alamo 'file name' April 2020).

Folder: Double click "Chapters" then select your chapter's folder

Campaign: "Chapters Campaign"

Do not change anything below "campaign"

When you are done, click 'Save file'.



HOW TO ADD A FILE PT. 5

Once you have clicked “Save file”, you will be redirected back to your file’s overview page. If you want to upload another file in the top right click on “FILES”, this will take you back to the Files home (PT. 1 slide). From there, repeat this process for as many files you need.

The screenshot displays the Salesforce Pardot user interface. On the left is a blue navigation sidebar with icons and labels for Marketing, Prospects, Reports, and Admin. The main content area shows the Salesforce and Pardot logos at the top. Below them is a breadcrumb trail: HOME > MARKETING > CONTENT > FILES. The 'FILES' link is highlighted with a red rectangular box. Underneath the breadcrumb, the text 'PARDOT HOW TO POWERPOINT.pptx' is visible. Below this is a greyed-out section, followed by the heading 'Contents'. At the bottom, a table header shows 'Name PARDOT HOW TO POWERPOINT.pptx'.

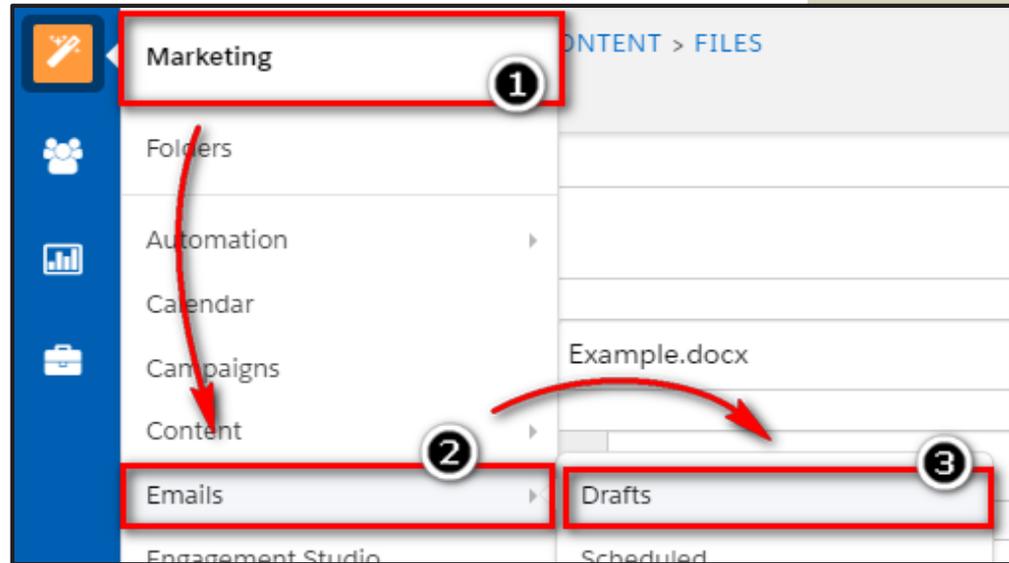


How to return to a saved message

If, for whatever reason, you left your message and want to get back in go to marketing – emails – drafts.



If you followed our suggested naming convention (ex: 4401 Alamo ...) then in the filter type in your chapter number and your draft will pop up.



List Email Drafts

View: Campaign: Date Range: Filter: Tags

	NAME	OBJECT / LIST	FROM	CREATED BY
<input type="checkbox"/>	TEST			Gwendolyn Bobst
<input type="checkbox"/>	/Chapters/4401 - Alamo			

1 Filter: test

2 Click the top line in the "NAME" column.

3 Type in your chapter # here



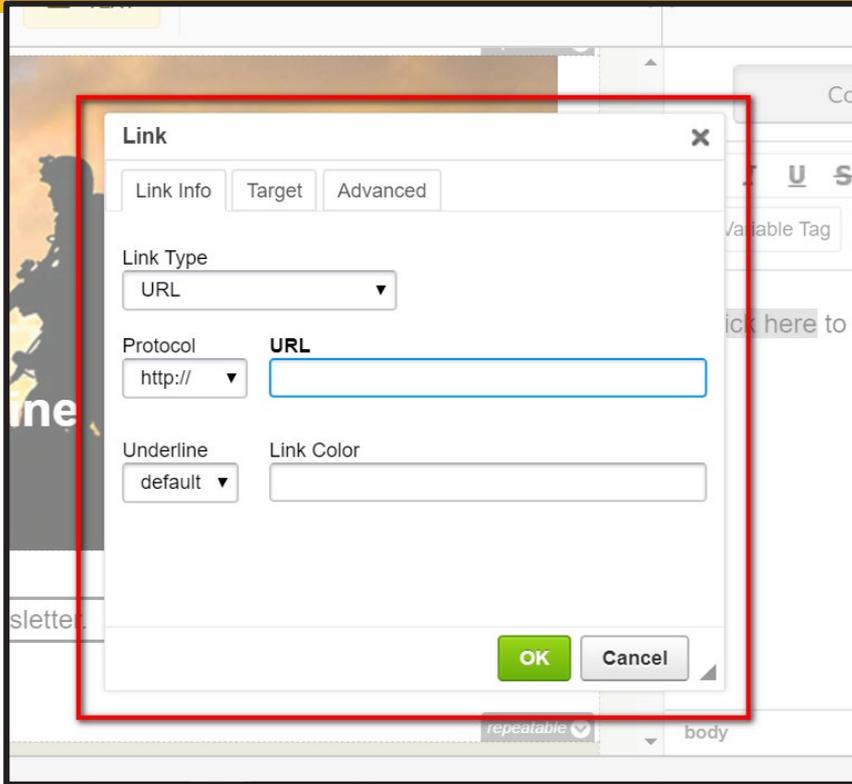
How to embed a file in your message Pt. 1

Once you've uploaded the file you would like to attach, you may now embed it in your message.

- Type a phrase referring to the attached file (Ex: click here to see ...)
- (1) Highlight the words in your phrase where you would like the file embedded
- (2) Click on the link image in the toolbar

The screenshot displays the Salesforce Pardot Content Editor interface. At the top, there is a search bar and a navigation menu with options like TEST, BUILDING, TESTING, and SENDING. Below this, the editor is divided into sections: EDITOR, HTML, PREVIEW, and TEXT. The main content area shows a large image placeholder with the text 'Insert Your Headline Here' and a smaller text field containing 'Click here to see this month's newsletter.' The text 'Click here' is highlighted with a red box and labeled '1'. The link icon in the toolbar is also highlighted with a red box and labeled '2'. The toolbar includes options for Bold, Italic, Underline, Strikethrough, Text Color, and Background Color. The interface also shows a search bar, a navigation menu, and a sidebar with various icons.

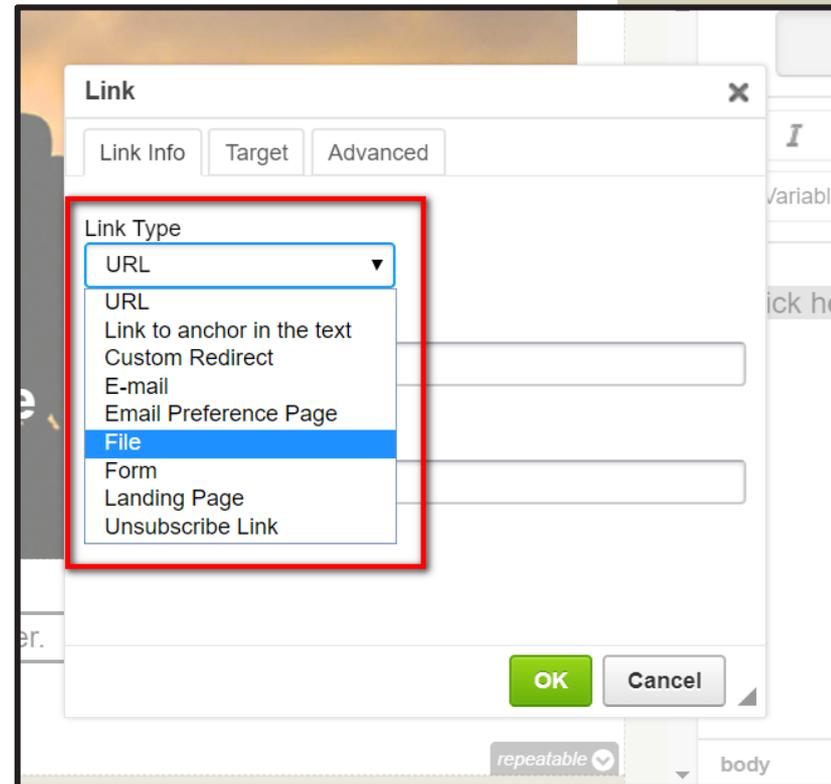
How to embed a file in your message Pt. 2



Once clicking the 'link' image, this screen will pop up.



In the "Link Type" section, click the dropdown and change from URL to File.





How to embed a file in your message Pt. 3

1. Select your file from the list.
2. Manually type in the color you would like the link to be (ex: blue)
3. Click "OK". Now your file is successfully embedded in your message.

The screenshot shows the Salesforce Pardot Content Editor interface. The main content area displays a placeholder image with the text "Insert Your Headline Here" and a link "Click here to see this month's newsletter." A dropdown menu is open, listing various files. A red '1' is next to the selected file. Below the list, the "Link Color" dropdown is set to blue, with a red '2' next to it. At the bottom, the "OK" button is highlighted with a red '3'.

salesforce pardot

EDITOR HTML PREVIEW

Content Editor

Content Styles

Underline Link Color

default

OK Cancel

repeatable body



8. Once you have finished editing your message, **skip over the “HTML” subsection** and click on **“Preview.”** Here you will see the preview of how the message will look like to your recipients.

If you see something that needs changing, simply click back on “Editor” and you will be back in your message. Make your changes, click “Save”, then click on “Preview” again to make sure you are satisfied with the changes.

The screenshot shows the Pardot email editor interface. At the top, there's a search bar and user profile. Below that, the message status is 'test' and 'BUILDING'. The 'PREVIEW' tab is selected, with a green arrow pointing to it. The 'HTML' tab is crossed out with a red X. The 'EDITOR' and 'TEXT' tabs are also visible. The 'To' field is 'Preview as a Prospect' and the 'Subject' is 'Chapter News'. The main preview area shows a newsletter header for the 'ASSOCIATION OF THE UNITED STATES ARMY' with a logo and a placeholder image of soldiers at sunset with the text 'Insert Your Headline Here'. The 'Save' and 'Cancel' buttons are at the bottom right.

9. After “Preview”, move on to the “Text” subsection.

Click on “Sync from HTML”. After syncing, remove all empty space in the message and bring all text over to the left.

Don’t forget to hit save frequently!



BEFORE

Marketing
Prospects
Reports
Admin

TEST BUILDING

EDITOR HTML PREVIEW TEXT

Sync From HTML

Insert Variable Tag

http://www.facebook.com/ausa.org

https://www.instagram.com/ausaorg/

http://www.twitter.com/ausaorg

http://www.youtube.com/ausanation

AFTER

Marketing
Prospects
Reports
Admin

TEST BUILDING TEST

EDITOR HTML PREVIEW TEXT

Sync From HTML

Insert Variable Tag

<http://www.facebook.com/ausa.org>

<https://www.instagram.com/ausaorg/>

<http://www.twitter.com/ausaorg>

<http://www.youtube.com/ausanational>

Home <https://www.ausa.org/>

Contact Us <https://www.ausa.org/staff>

Donate <https://www.classy.org/campaign/ausa-usd20k-in-2020/c266938>

Store <https://shop.ausa.org/>

Privacy Policy <https://www.ausa.org/privacy-policy>

2425 Wilson Blvd, Arlington, VA 22201 | Phone: 703-841-4300 tel:7038414300

Member Services: 1-855-246-6269 tel:18552466269

Email: membersupport@ausa.org <mailto:membersupport@ausa.org>

Save Cancel

10. After you are done in “Building”, move to “Testing”. Here you can send the message to yourself and a few other individuals to make sure the message looks good before sending it out. **Note: you will receive two emails: the html version and the text version.**



Send to Test Lists

Pardot will send proof emails for review to the members of the lists selected below.

Test Lists

Select a list to add...



Send To Test Lists

If you would like a Test List of chapter members you consistently send test messages to please email either Stan Crow or Gwen Bobst and we will upload the list for you.

Send to Individual Emails

Separate multiple email addresses using commas (,).

Emails sent to manually entered addresses will not populate variable tags or re-write links to be tracked.

Individual Emails

Send to Individual Emails

If you do not have a list, type in your individual emails separated by a comma here.

Rendering



In “Testing”, the final section is “Rendering Tests”. This feature allows you to see what your message will look like from all platforms including Gmail, iPhone, iPad, Outlook, Yahoo, etc.

Click the blue **“New Render”** button and wait about 5 to 15 minutes.
Hit the **refresh** button occasionally to see the updated status.
Once it is uploaded, click on the **section with your message’s name** and you will be presented with a pop up window showing you all the platforms

Rendering Tests

See how your email will look in various email clients. Powered by [Litmus](#)

Email rendering can take some time -- simply click the refresh button to check if your renders are ready for viewing.

[+ New Render](#) 

Page 1 of 1

Rendering...	Proof - Untitled	2020-04-16 09:21:47
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11. After you have reviewed your test message and are satisfied, click on “Sending” tab. Here you will fill in the “To”, “From”, and “Subject Line” sections.

Click **“Save”** all the way to the bottom right when you are finished.

To Choose who gets your email.

Lists (Send To) *

Select a list to add... Choose

Click “Choose”, type in your chapter #, then select your desired list.

Suppression Lists (Don't Send To)

Select a list to suppress... Choose

From Choose who your email is sent *from*.

We'll set the From address using your first option below. If it's not available for a given prospect, we'll send from the next option.

Sender *

+ General User ▼

> Name: ex: Alamo Chapter

> Email: ex: C4401@ausa.org

**Leave the sender as “General User”.
Name: Type in whatever name you would like - the chapter name or a personal name.
Email: Use your @ausa.org email account.**

If the recipient does not have a value for the reply-to variables chosen below, replies will go to the address the email is sent from.

Custom Reply-To Address

+ General Address ▼

> Email: ex: gbobst@ausa.org

**Leave the Custom Reply-To as General Address.
Use any email address you would like - either your @ausa.org email or your personal.**

Subject Adjust your subject as needed.

Subject Line * Advanced Subject Composer

ex: AUSA Alamo Chapter April Newsletter

Type your desired subject line here.



12. You are now ready to schedule your message! To the right of your screen, click “Schedule” and you will see a dropdown to change the date and time. A good practice is to schedule at least 20 minutes in the future. This allows you to go back and make changes if needed.

Click on the calendar icon to select the date you want the message to go out.

The screenshot shows a scheduling interface with a message preview at the top. Below the preview, there is a section for scheduling. A red arrow points to the calendar icon next to the date field, which is currently set to 2020-03-04. A calendar dropdown is open, showing the month of March 2020. The date 4 (March 4th) is highlighted in blue. The time field is set to 2020 8:02 AM.

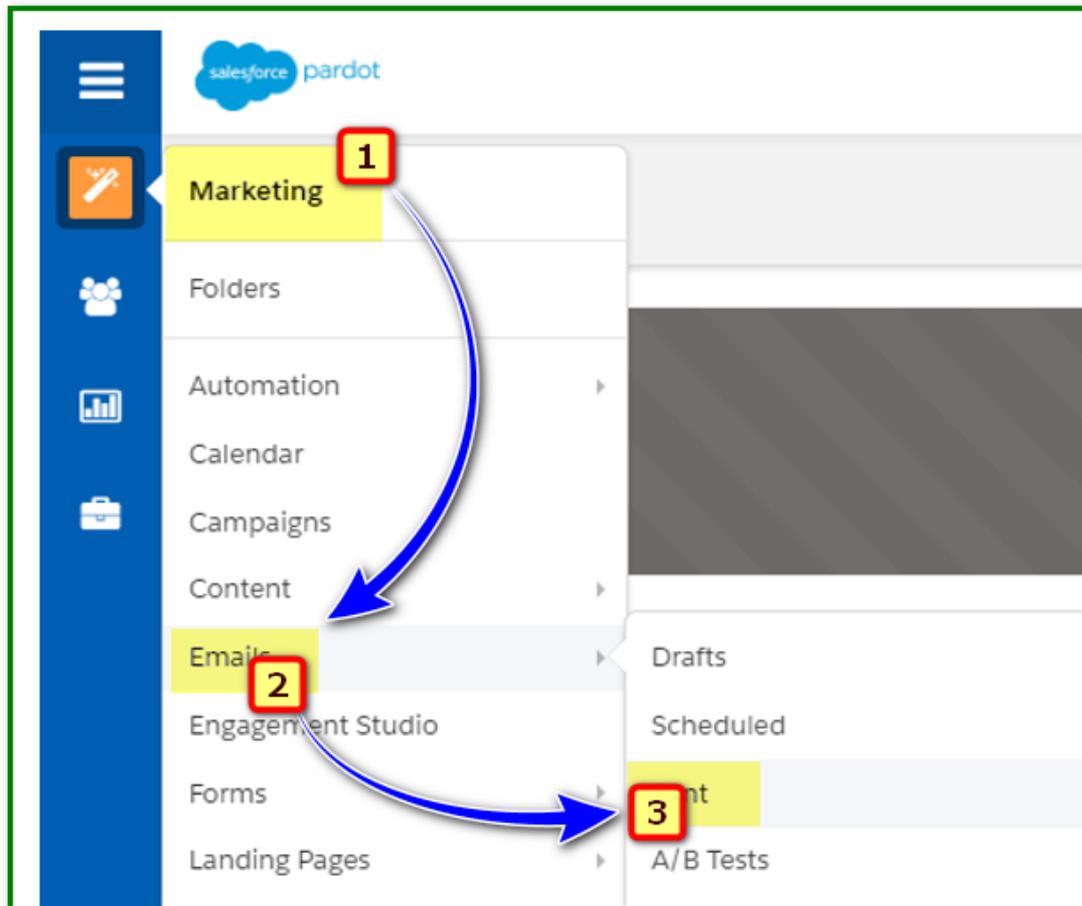
Click on the clock icon to select the time you would like the message to go out.

The screenshot shows the same scheduling interface as the previous one, but with the time field selected. A red arrow points to the clock icon next to the time field, which is currently set to 08:02 AM. A time selection dropdown is open, showing the time 08:02 AM. The date field is set to 2020-03-04. The time field is set to 08:02 AM. The time selection dropdown is open, showing the time 08:02 AM. The time field is set to 08:02 AM.

13. After it has sent, you can check your message's "Report". This will show stats such as bounce rates, who has opened the message, who clicked links, etc.



To get to the report go to Marketing – Emails – Sent. Type in your Chapter # in the filter then select your message.



14. Once you select your message you will be directed to a page similar to this. In the top right corner select “View Report”.



HOME > MARKETING > EMAILS
AUSA Update (21 Feb 20) - News You Can Use

View Report Edit completion actions Copy

Contents

Name AUSA Update (21 Feb 20) - News You Can Use
Folder /Chapters
To Lists News You Can Use
Sender 1. User: Stanley Crow
Reply-To 1. General Address: <RegionalActivities2@ausa.org>
Type List Email
Content Type Marketing Email
Email Template Chapter Leaders - News You Can Use
Sent On Feb 21, 2020 9:35 AM
Subject AUSA Update - News You Can Use
Bounce Not A Bounce
Tags ausa hq
Created At Feb 21, 2020 9:17 AM
Updated At Feb 21, 2020 9:38 AM
Created By Stanley Crow
Updated By Stanley Crow

On Click
There are no actions

On Open
There are no actions

On Unsubscribe
There are no actions

15. In “Report”, there are four sections of information that you can explore: “Report”, “Click-Through Rate Report”, “Interaction”, and “Email Clients”.



Report Click-Through Rate Report Interaction Email Clients

HOME > REPORTS > EMAILS
AUSA Update (10 Apr 20) - News You Can Use [View email](#)

Report Click-Through Rate Report Interaction Email Clients

100.00%
Delivery Rate

38.70%
HTML Open Rate

11.58%
Click to Open Ratio

Campaign Chapters Campaign
Subject AUSA Update (10 Apr 20) - News You Can Use
Sent On Apr 10, 2020 9:56 AM
Created At Apr 10, 2020 9:56 AM
Updated At Apr 10, 2020 9:59 AM
Created By [Stanley Crow](#)
Updated By [Stanley Crow](#)
Sent To [News You Can Use - March 2020](#)
Suppressed From
Total Sent 1,049

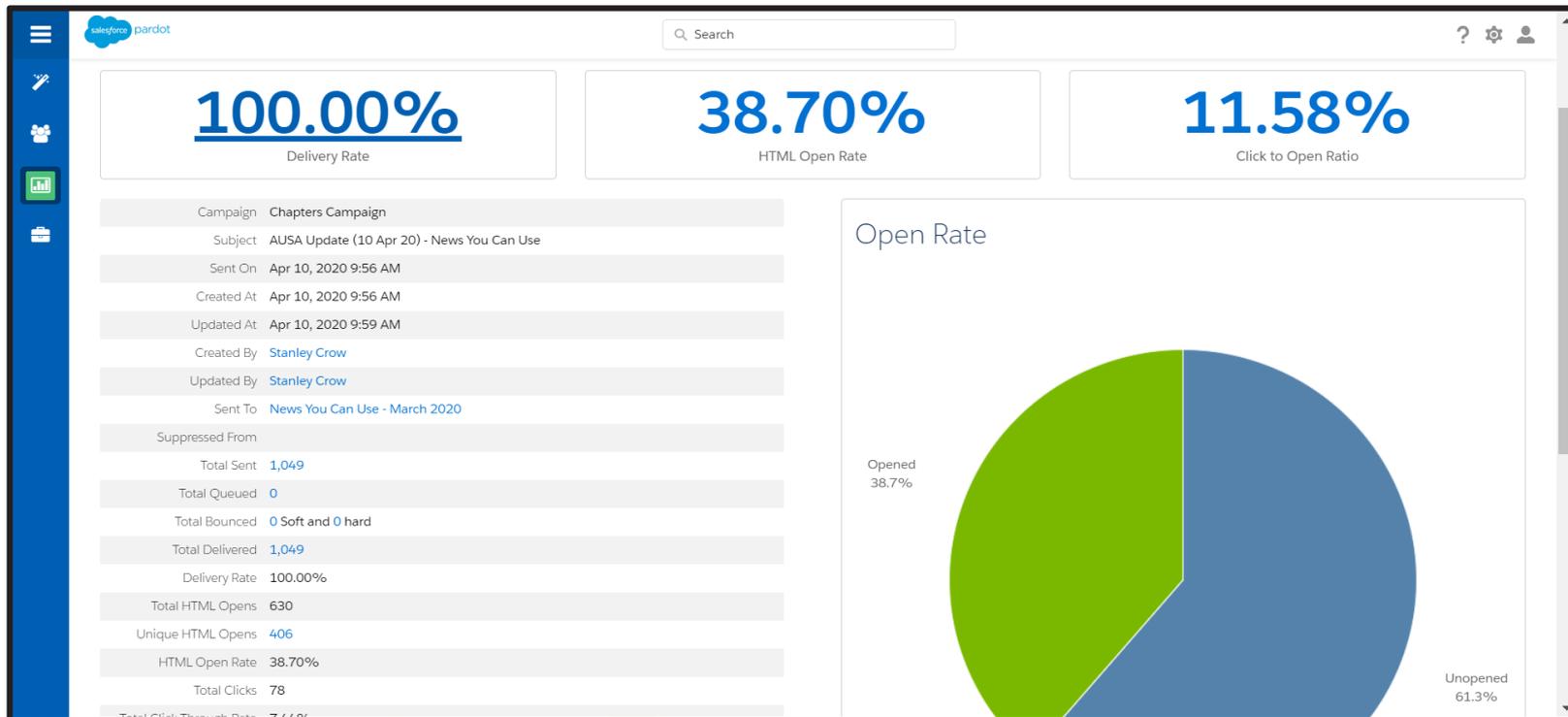
Open Rate

Opened 38.7%



Report

“Report” is a good overview of your message. Here you can see how many people your message was delivered to, the bounce backs, delivery rate %, etc. Any number in [blue](#) is an active link you can explore.





Click-Through Rate Report

“Click-Through Rate Report” allows you to see the percentage of who clicked on your embedded links.

We strive to have 2% or more for links.

The screenshot displays a Pardot report interface for an email titled "AUSA Update (10 Apr 20) - News Yuo Can Use". The report shows the following click-through rates (CTR) for various links:

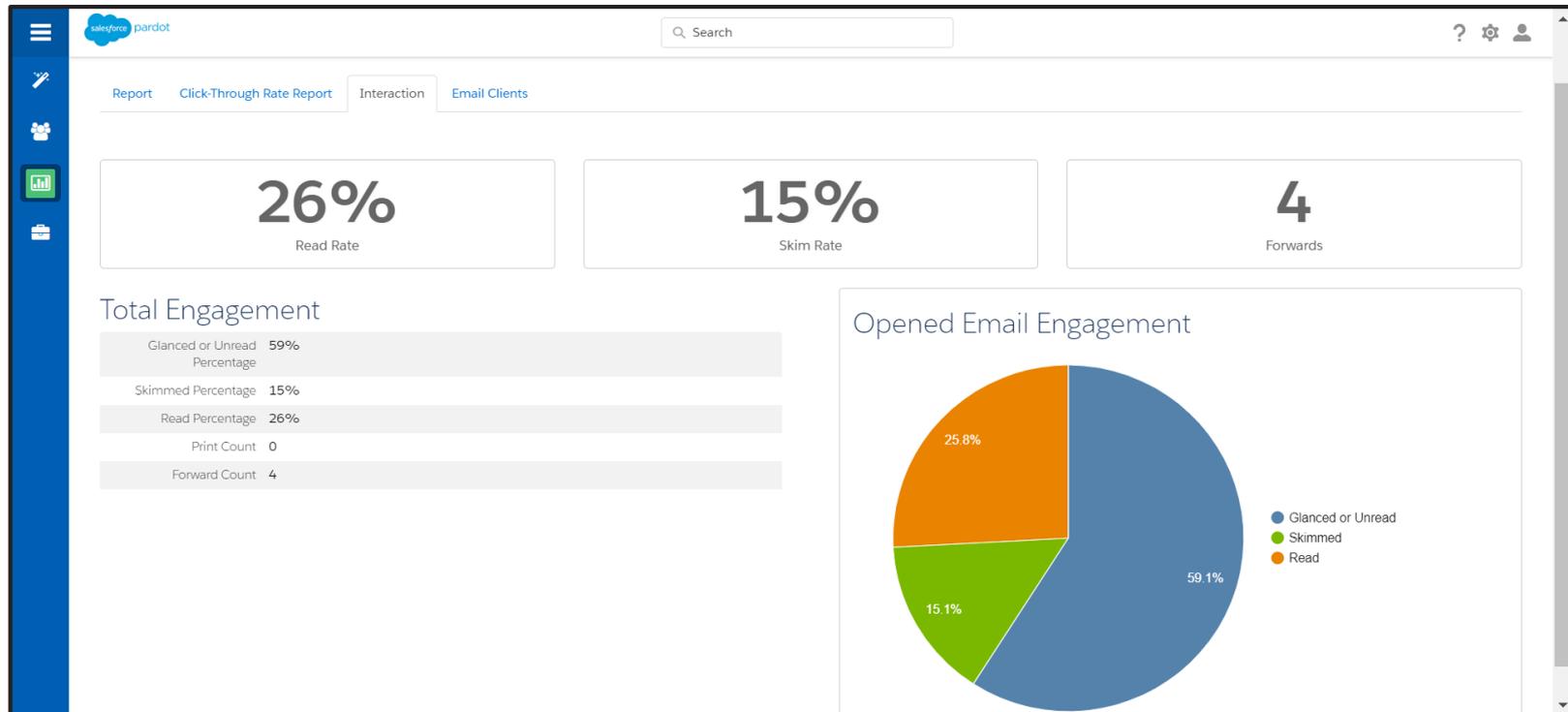
- CHAPTER ACTIVITY**: 1.5% (third quarter 2020). [Click here for](#)
- AUSA's 2020 NATIONAL SCHOLARSHIP NEW SUBMISSION DATE**: 4.4% (current). [Click](#)
- CHAPTER ACTIVITY REPORTS**: 1.5% (third quarter (1 January – 31 March 2020) **has been extended to June 30, 2020**). [Click here](#) for information about submitting CARs.
- VETERANS BENEFIT NEWSLETTER**: 1.5% (providing grants with extensive benefits and services while moving more to a virtual environment). [Click here](#) for more information.
- AUSA'S ARMY MATTERS PODCASTS**:
 - How is COVID-19 affecting Soldiers? SMA Grinston, the Army's top non-commissioned officer (NCO), describes how the Army's Medical Research Labs are working on a vaccine, the courageous work of Army medical providers, and efforts to balance killing the virus with maintaining readiness and protecting the force. SMA Grinston covers PCS (Permanent Change of Station) changes, including interrupted moves and financial hardship related to COVID-19, and reminds everyone to stay fit and healthy at home. [Click here to listen](#).
 - What's the latest with rollouts for Army Greens (AGSU), a new PCS app, and Army Combat Fitness Test (ACFT)? SGM Edward Bell of the G-4 discusses these and

Red boxes and arrows highlight the CTR percentages and the corresponding links in the report.



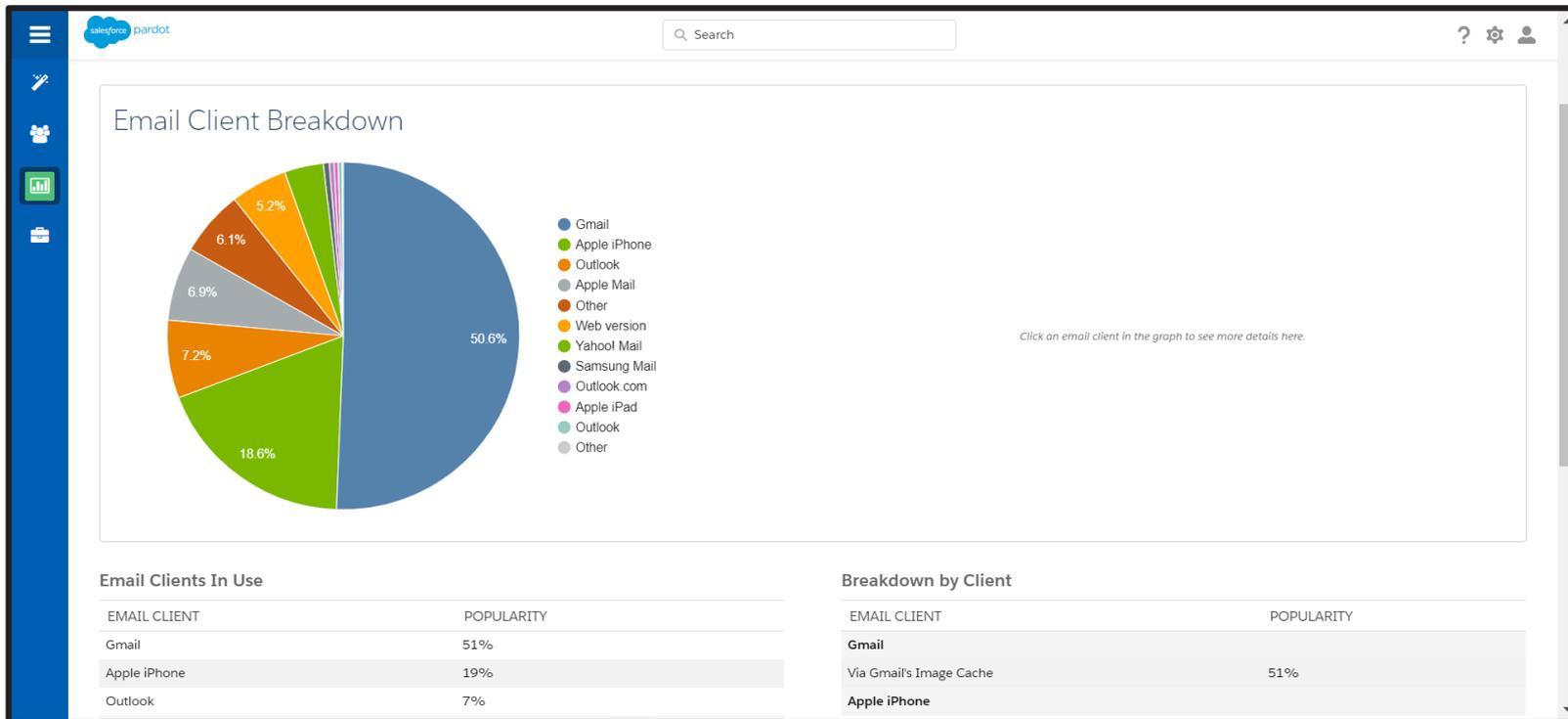
Interaction

“Interaction” allows you to see how long people spent reading your message (read, skim, etc.).



Email Clients

“Email Clients” gives you stats on what email clients your members are using to read your message. This is useful information to check whenever you run a rendering test. The majority of our members use Gmail and iPhone so it is good practice to make sure your message looks good on those platforms.





This concludes our PowerPoint Pardot Training.

Any questions please send them to:

Stan Crow, scrow@ausa.org

Gwen Bobst, gbobst@ausa.org