

Frequently Asked Questions – Pardot

What is Pardot?

Pardot is a software as a service (SaaS) marketing automation platform by Salesforce that we use for our mass email service.

Who do I contact if I would like to set up a Pardot account as a chapter user or if I'm interested in receiving Pardot training? Or if I have a question about Pardot?

Contact either Stan Crow at scrow@ausa.org or 703-907-2689 or Gwen Bobst at gbobst@ausa.org or 703-971-2631.

When did AUSA start using Pardot?

Pardot was first used by AUSA National in February, 2020 and then used by the Chapters in March, 2020.

How many Pardot users should a chapter have?

We recommend a chapter have at least two users if possible. A few chapters have 3-4 users.

When will the new editable Pardot templates be available?

The new "Basic Chapter Templates" will be available by July 2020.

What are some of the advantages of using Pardot?

Pardot is one of the leading mass email services available and it is designed to connect with Fonteva, AUSA's new Automation Management System which will come online later this year. It allows for chapters to have direct access to their membership email lists. Also, it has a robust analytical tool for chapters to research some key message diagnostics.

What are some of the disadvantages of using Pardot?

- For now, Pardot will not allow you to upload chapter email lists and customized email lists (not the chapter member list).
- Also, you must use an "ausa.org" email account as the "Sender" in your Pardot messages.
- Currently we are using basic Pardot email features while chapter members adapt to the new system. So for now there are limited personalization features.

If one of my members is not receiving a Pardot message from National or the chapter, how do they restore the email service?

Please contact Stan Crow or Gwen Bobst and they will review the issue and restore the chapter member's email from Do Not Email or Opt Out, if necessary.

The Troubleshooting Guide is also a great resource to help review the issue and figure out the cause.

As a chapter user of Pardot, can I upload an email list into Pardot?

Pardot is configured so that only AUSA National Admin users can manually upload a "static" chapter email list. AUSA National will be switching to a new Association Management System (AMS) called Fonteva sometime in late summer or early fall. At that time, chapter users will be able to access their chapter's "dynamic" membership email list without AUSA National's assistance. Please email all other specific email lists (such as Community Partners, Officers, etc.) to Stan Crow or Gwen Bobst who will be able to upload them into Pardot.

How often should a chapter send Pardot messages to its members?

We recommend a chapter send a Pardot message at least once a month. Some chapters send 2-4 messages per month depending on what's taking place in their chapter. Chapter members should send a maximum of 4 messages per month.

How many images can I include in my Pardot message?

Some email spam filters monitor emails' text-to-image ratio (how much text there is in an email to how many images there are). If this ratio is too large, the email spam filter could mark the message as spam.

We recommend chapters limit the number of images embedded in their messages to 2-4 images. A good work-around if you have a large number of images, such as logos of all of the chapter's community partners, is to put all of the logos in a document and save it as a pdf file. This will take up much less room and can be attached to the message.

Resources for reducing size:

- Reduce image file size: <https://tinypng.com/>
- Free online photo editor (crop, add text, add border etc.): <https://pixlr.com/x/>
- Create a collage: <https://www.fotor.com/create/collage/>

Can I embed my pdf newsletter or flyer as an image in my message?

No, we highly recommend you do not do this. The Pardot templates are not built for this and could cause very strange message renderings and/or not make it through most spam filters.

Why is there a lock icon next to my chapter's folder?

This means that anything in the chapter folder can only be viewed by members of your chapter or National.

Why do some of my prospects have a little red person icon next to their name?

This means they have not yet interacted with a message sent from Pardot. They could still be receiving the emails but may just not be opening them.

Can you resend a message (not as a test version) to the same person? Or other people who had it sent to them?

You would need to create a new list with the people who need to receive the message, copy the sent email, create a new message, and then send to the new list. It is not recommended to resend an email to the whole chapter list. Please contact Stan Crow or Gwen Bobst for more information on how to resend an email.

How do I copy a message?

You go to "Marketing" > "Email" > "Sent" > to a specific message you want to copy. Then click on the sprocket/cog icon in the "Actions" column, it will show a drop-down menu and then click on "Copy."

How can I see all the prospects on my list that are 'unmailable'?

Go to "Marketing" > "Folders" then select your "Chapter." Then you will see your email lists and select the one you are interested in checking. There is a dropdown list under the text "View:", click on "unmailable prospects" in the dropdown to access your list.

I want to export a list of prospects into an excel sheet. How do I do this?

Send a request to Stan Crow or Gwen Bobst to pull this list for you.

I sent myself a test message and never received it. Why?

First, double check the email address you typed into the “Individual Sender” block is correct. If it is correct, then check your spam/junk folder to see if the message is there.

I left Pardot and now want to continue working. How do I find my email?

You will need to go to “Marketing” > “Emails” > “Drafts.” Then use the “Filter” block to search for the message title to find your message.

Where do I find our chapter’s email list(s) in Pardot?

Go to “Marketing” > “Folder” > find your chapter, then your email list(s) will be there.

What does the “Score” section mean when looking at my prospects?

The score is not currently set up and so it does not impact any emails or prospects.

- **Does the Score also include clicks on Chapter emails?** The score includes anytime ANY email is opened, a link is clicked, or other actions that a prospect has done. A click is specific to clicking a link in an email.

- **For those that have opted-out, is the SCORE from before they opted-out** The score continues after Opted-out also.

Why can’t I access my draft email message and make changes to it? There is a locked sign on the message?

This happens when someone else from your chapter is editing the message at the same time. You need to ask them to do this 3-step process:

1. They need to be in the “Building” step, in “Editor” working on the draft message.
2. Then click “Save,” > click “Cancel”.
3. Then sign out by going to the upper right corner of the page, click on the “person” icon, the dropdown menu will appear, and click on “sign out.”

If you are still experiencing this issue after taking the above steps, please contact Stan Crow or Gwen Bobst and they will review the issue.

When we look at the “preview,” it shows a generic title at the top of the message that says “Chapter Name.” How do I change that?

Go to the “Sending” section and under the “From” title, change the name in the “Sender” field .

When inputting a message name or file name, what should I enter for “Campaign?”

Chapter users should always enter “Chapters Campaign.”

When in the “Sending” section and the “From” sub-section, do I have to use an “ausa.org” email address?

Yes, you **must** use “ausa.org” email address here so the Pardot message syncs with the AUSA domain. This will let your message pass through the majority of spam filters. If you use a personal email or non-“ausa.org” email address, Pardot will mark a large number of your email addresses as “Do Not Email.”

Why are my HTML emails displaying slightly differently in Outlook?

This is not unusual. Your HTML message will render slightly differently in every email client (Outlook, Gmail, AOL, Apple, ...) due to each email client's unique coding. Outlook is especially sensitive when it comes to images so keep that in mind when creating your message.

How do I attach a document?

See Pardot training slides provided by Stan Crow and Gwen Bobst. It will show the step-by-step process to attach a document.

When someone is opted-out, do they no longer receive any AUSA messages? Yes, they can unsubscribe from all emails or update subscription preferences of what they want to receive.

Is there a way I can tell what preferences I have selected?

You go to "Marketing" > "Email" > "Preferences Page" > Click the blue link under the word "LINK" to view your email preferences. This list only includes email lists that are Public, so chapter lists that you subscribe to will not be displayed here.

Does Pardot have a survey function? We recommend using a free service such as Survey Monkey and attaching the survey link in your message.

What should I do if I am not receiving Pardot messages from National or my chapter? Contact Stan Crow or Gwen Bobst and they can have it fixed.

What if I want to use a large number of images in my Pardot message?

We recommend a maximum of 4-5 images per email – the more images, the more likely it gets flagged as spam.

When in the "Building" section and "Text" sub-section, when I edit the message there, will it save back to the "html" area? No, unfortunately editing the text section will not update the HTML.

How can a chapter user check their "unsubscribed," "opt-out's"?

You can go to a specific chapter message and view who has opted-out of a certain message or you can see the 'Unmailable Prospects' in Pardot. Also, Stan or Gwen can pull the unmailable list and send it to you.

Is it possible for a chapter user to use one of the other templates (e.g., Expiring Member message)? AUSA's policy is that chapters only use "Chapter" templates.

Can a chapter user add a column or another full-page section (like image or text) box to a message?

The more Chapter templates will be added and will provide several options for chapter users to customize their email with columns, tables, and images.

How large can the attachments be? The attachment size limit is 50 MB.

Why is the email mailable rate so much smaller than the original email list? In a couple of cases it is 75% smaller? This is due to the unsubscribes, opt-outs, do not emails, and duplicates being removed.

Why is the preview not an accurate representation of the test email?

Preview is just what you created in the “Editor” sub-section. “Rendering” in the “Testing” section shows a much better representation of the final email since it goes directly through the email clients. We recommend that after Rendering you also go to the “Testing” section and under the “Individual Email” sub-section, send yourself a “Test” email to see how your message looks in your email client as well.

Can I forward Pardot messages to other people?

No, we recommend that you do not because if the recipient unsubscribes or marks it as spam, then Pardot thinks it is the original recipient’s account and will unsubscribe the original sender.

When I upload an image into my Pardot message, what is the size limitation?

We recommend using nothing larger than Width: 800 and Length: 240 and usually use much smaller sizes than this.

- **What size does it need to be for adding my chapter logo?** The size is width: 125 by length: 93.

How do I change my template?

You need to start a new message in the new template. The work cannot be carried over.

If you have yet to start editing, then click “Apply a Layout” on the Content Editor on the right side of the “Editor” subsection in the “Building” tab.

For more detailed instructions on how to create, test and send a message: See Pardot training slides provided by Stan Crow and Gwen Bobst.