PARDOT EMAIL MARKETING
A GUIDE FOR AUSA CHAPTERS

salesforce pardot

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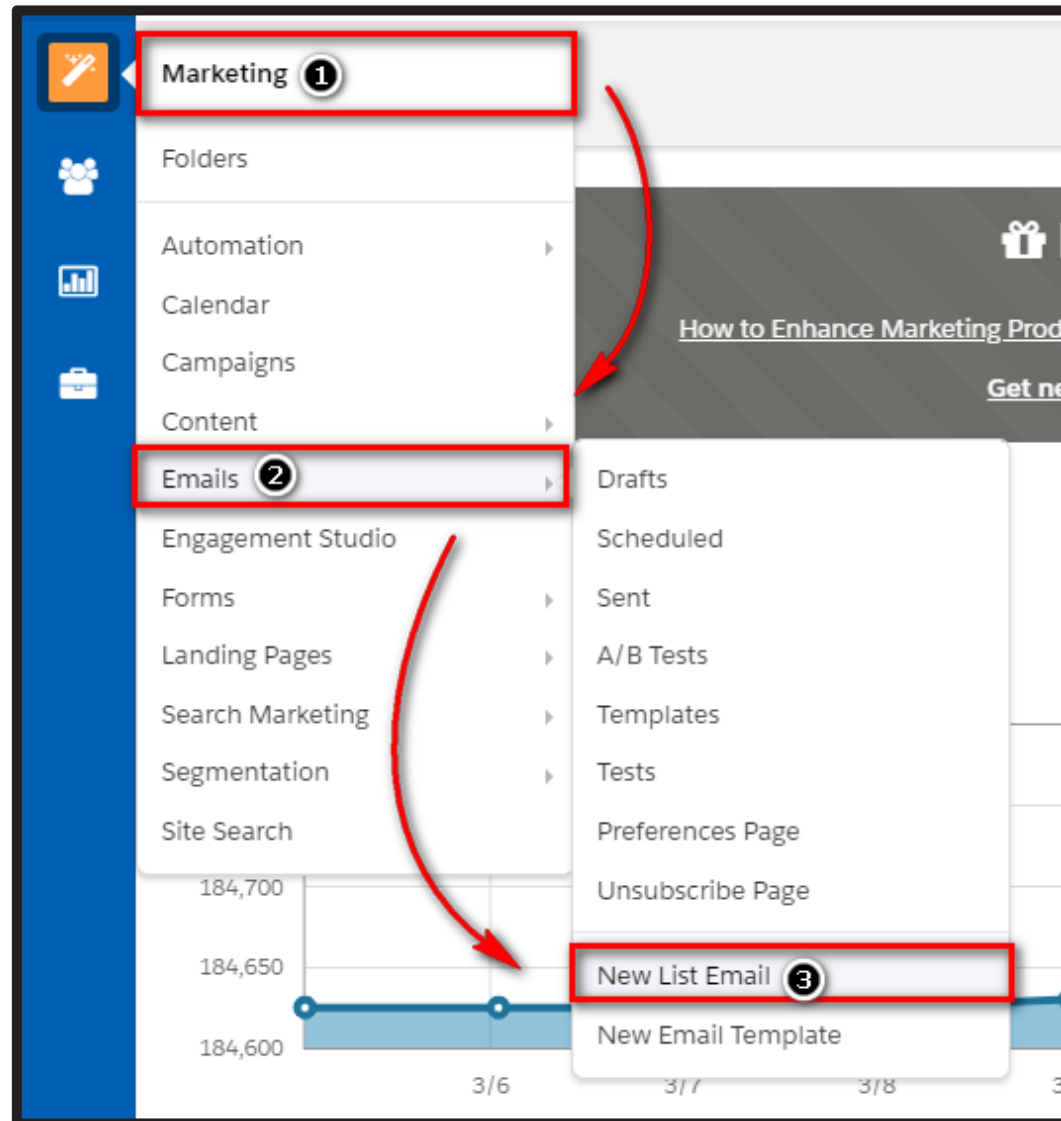# PARDOT: HOW TO CREATE AND SEND AN EMAIL

GETTING STARTED

1. Go to pi.pardot.com and click **Log In with Salesforce**.
2. In the pop-up window, enter your username and password.
3. Click **Log In**.

1. To create a new email, begin by hovering over the **Marketing** icon in the blue bar to the left of your screen.
2. Hover down to **Emails**, then select **New List Email**.

3. Fill in **Name**, **Folder**, and **Campaign** following the instructions below.
4. Click **Save**.

Basic Email Information

Name *

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

Folder * 📂 /Uncategorized/Emails

Double click "Chapters" then
search for your chapter

Campaign * 📣 Choose a 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

Save   Cancel

5. AUSA has provided two templates for chapter use. Select the one you prefer and click **Apply**.
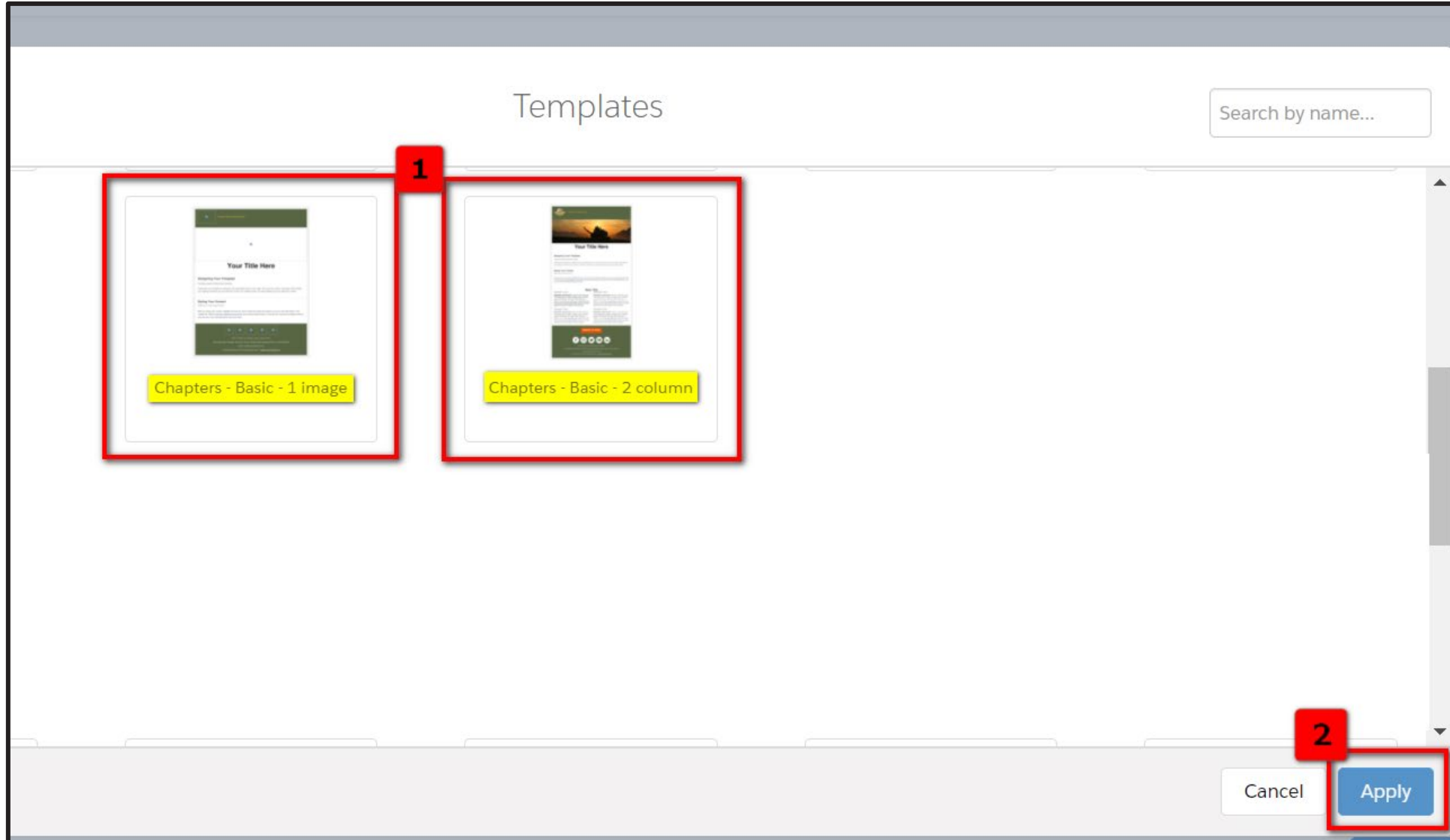
Pardot guides you through your email with three main steps:
Building, Testing, and Sending
Within **Building**, there are 3 subsections: **Editor**, **Preview**, **Text**

NOTE: The HTML subsection is your message's coding. No need for action.

BUILDING

You will begin in the **Building** subsection, **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.

Click the section you want to edit and it will appear on the right side in **Content Editor**, which is essentially a mini word document. Edit the section to your liking and click **Save**.

click on the dropdown for all options.

How to remove a section of the template.

1. Click the section you want to remove.
2. In the upper right-hand corner of the section, there will be a drop-down called **repeatable**. Hover over the drop-down and click **Remove Row**.

Once you are done editing, go to **Preview**.
If you see something that needs changing, simply click back to **Editor**.
Make your edits, **Save**, then go to **Preview** again to make sure you are satisfied with the changes.

Once you are satisfied with your message, go to **Text**.

1. Click **Sync from HTML**
2. Remove all empty spaces and left-justify the text so that it looks like a regular email.
3. Click **Save**.

BEFORE

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Search

TEST BUILDING TESTING SENDING

Basic Info

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

AFTER

pardot

Search

TEST BUILDING TESTING SENDING

Basic Info

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

HOW TO SAVE A FILE OR IMAGE IN PARDOT

If you have an attachment you want to add to your email, you may upload the file in Pardot either before starting your message or during.

1. Go to **Marketing** - **Content** - **Files**.
2. Click on the blue rectangle towards the top called **Upload Files**.

3. Select the file from wherever you saved it on your computer.

4. Your file will appear below the blue upload area. We are not done yet! Click **(edit)**, which is to the right of your file's name.

You will be directed to an overview page of your file. Click **Edit file** in the top righthand corner.

5. Name your file and save it to your folder and campaign by following the instructions below and save. Your file is now uploaded to Pardot.

Edit File

Name: Example.docx

Folder *: /Uncategorized/Files   Choose

Campaign: Choose a Campaign   Choose

File: Choose File

Leave this field blank to keep your existing file or upload a new file to overwrite your e...
All Pardot-hosted files are publicly available at the assigned URL. Don't upload sensitiv...

Tracker Domain: ...ry (https://info.aus...   ▼

Vanity URL: /

Enter a u... ...lank to use an autogenerated URL

Completion Actions
➕ 🗑

➕ Add new completion action

Save file   Cancel

Name: Edit the file's name to follow our naming convention (ex: 4401 Alamo Test File May 2021)

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 RETURN TO A SAVED MESSAGE

1. Go to Marketing – Emails – Drafts.
2. In Filter, type in the name of your email then press "enter" on your keyboard.

List Email Drafts

View:	Campaign:	Date Range:	Filter:	
List Email Drafts ▼	All Campaigns ▼	All Time ▼	test	Tags▼

1

Type the name of your email here.

	NAME	LIST	FROM	CREATED BY
☐	TEST			Gwendolyn Bobst
☐	📁 /Chapters/4401 - Alamo			

2

Then click the name of your email.

HOW TO EMBED A FILE, IMAGE, OR LINK INTO YOUR MESSAGE

FILE

1. Type a phrase referring to the attachment (Ex: "click here to see") in **Content Editor**.
2. Highlight the word or phrase where you would like the file embedded.
3. Click the **link** icon in the toolbar.

4. A pop-up window will appear. In the **Link Type** section, click the dropdown and select **File**.

FILE

5. Select your file from the list.
6. Type in the color you would like the link to be (ex: blue)
7. Click **OK**. Now your file is successfully embedded in your email!
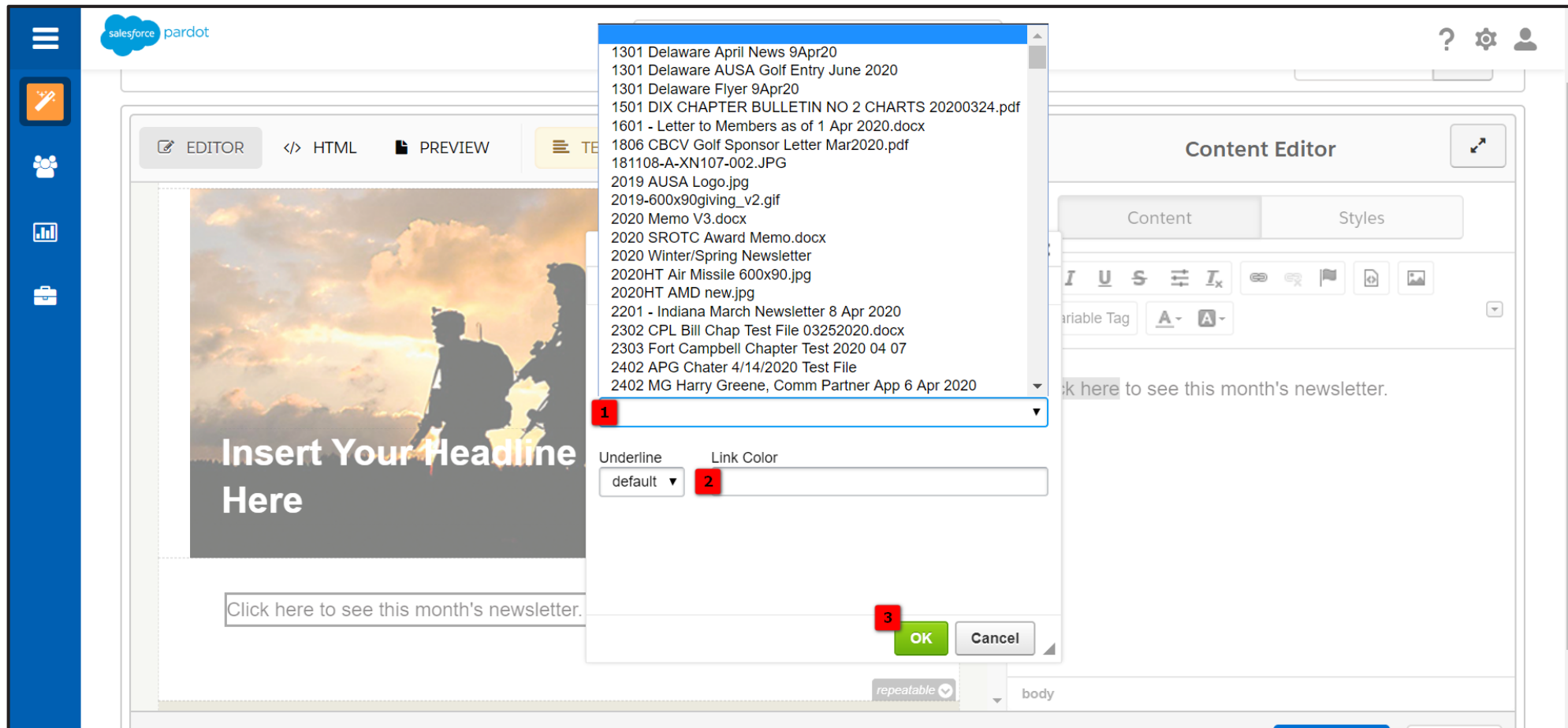
LINK

1. In **Content Editor**, highlight the word or phrase where you want your link to be embedded.
2. Click the **link** icon in the toolbar and a pop-up window will appear.
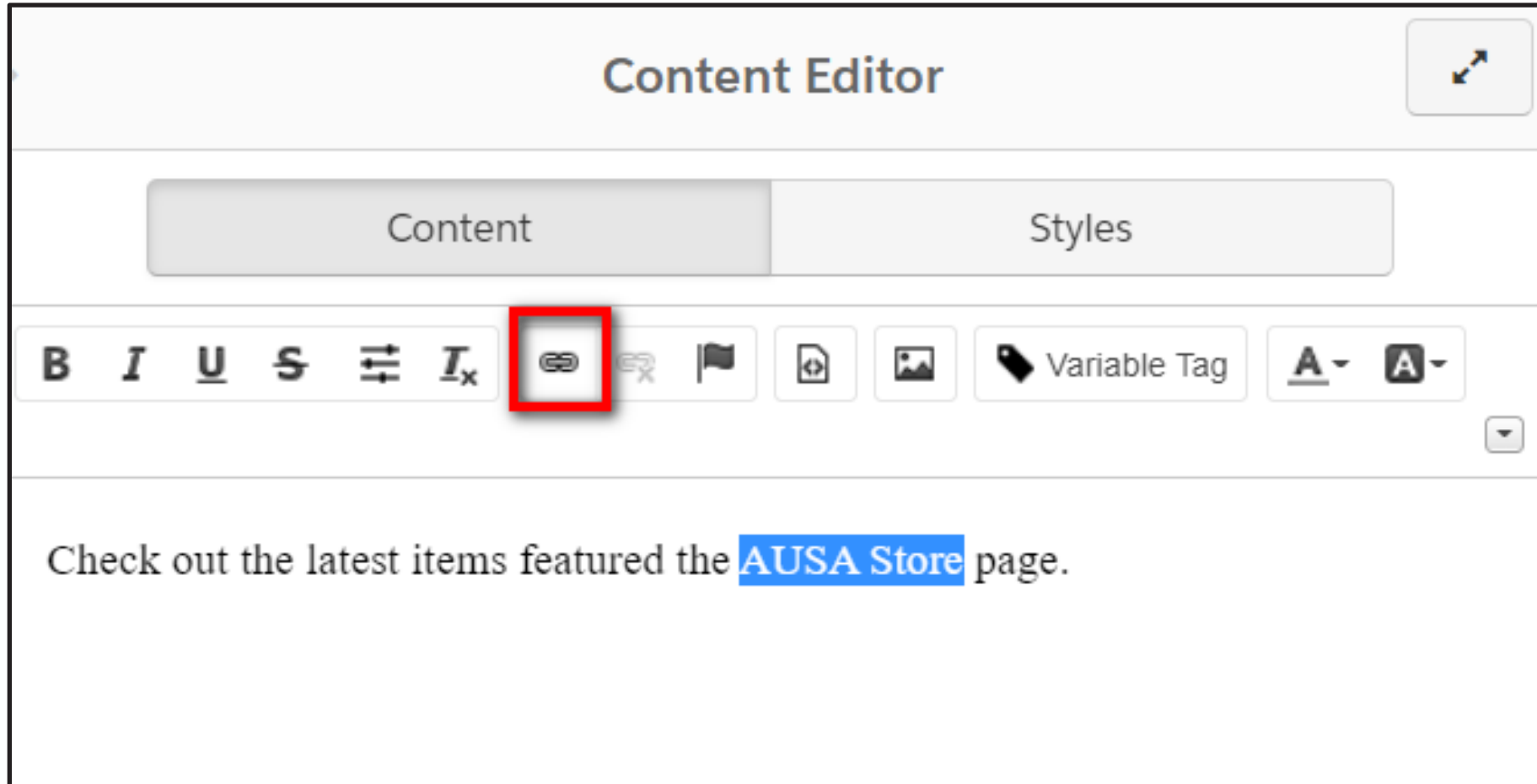
LINK

3. Keep **Link Type** set to **URL**.

4. Type or copy and paste in your URL.

5. Select **yes** for **Underline** and type in the color you would like your link to be in **Link Color**.

6. Click **OK**.

Link   ✕

| Link Info | Target | Advanced |

Link Type

URL ▾

Protocol   URL

http:// ▾   shop.ausa.org

Underline   Link Color

yes ▾   blue

OK   Cancel

IMAGE

1. Click into the section where you would like the image to be inserted.
2. In **Content Editor**, click the **image** icon in the toolbar.

IMAGE

3. If you have saved your image in Pardot, click the **Image** dropdown and select your image.
4. You can also adjust the size and alignment if necessary.
5. Click **OK**.

IMAGE

3. If you have not saved your image in Pardot, select the **Upload** tab in the upper left-hand corner of the pop-up window.
4. Click **Upload Files** and select the image you want to insert.
5. Click **OK**.
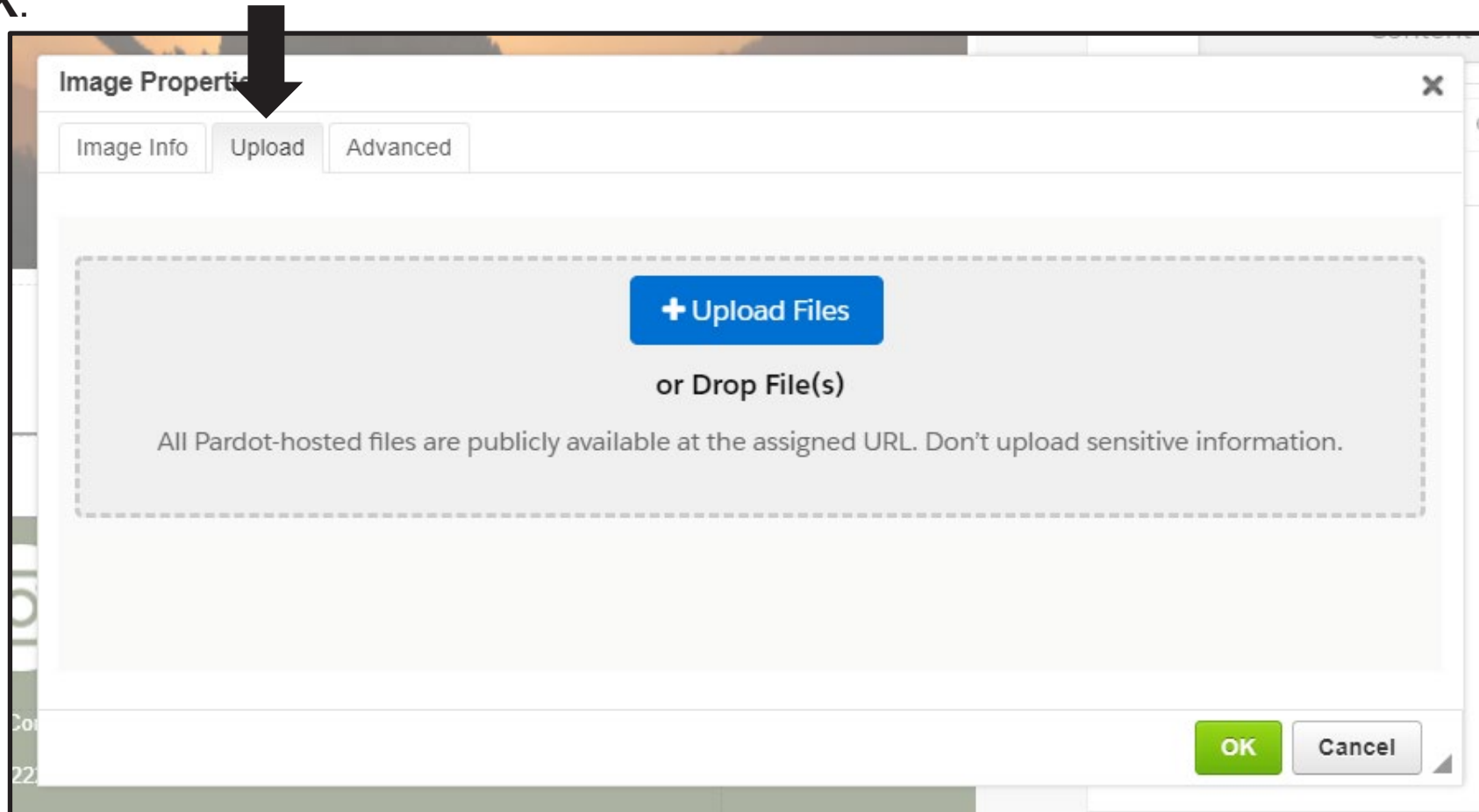
IMAGE

6. If you want to make any changes to the size and position of your image, right-click on the image in **Content Editor**.

7. Click **Image Properties** and you will be taken back to the pop-up window shown in the previous two slides.
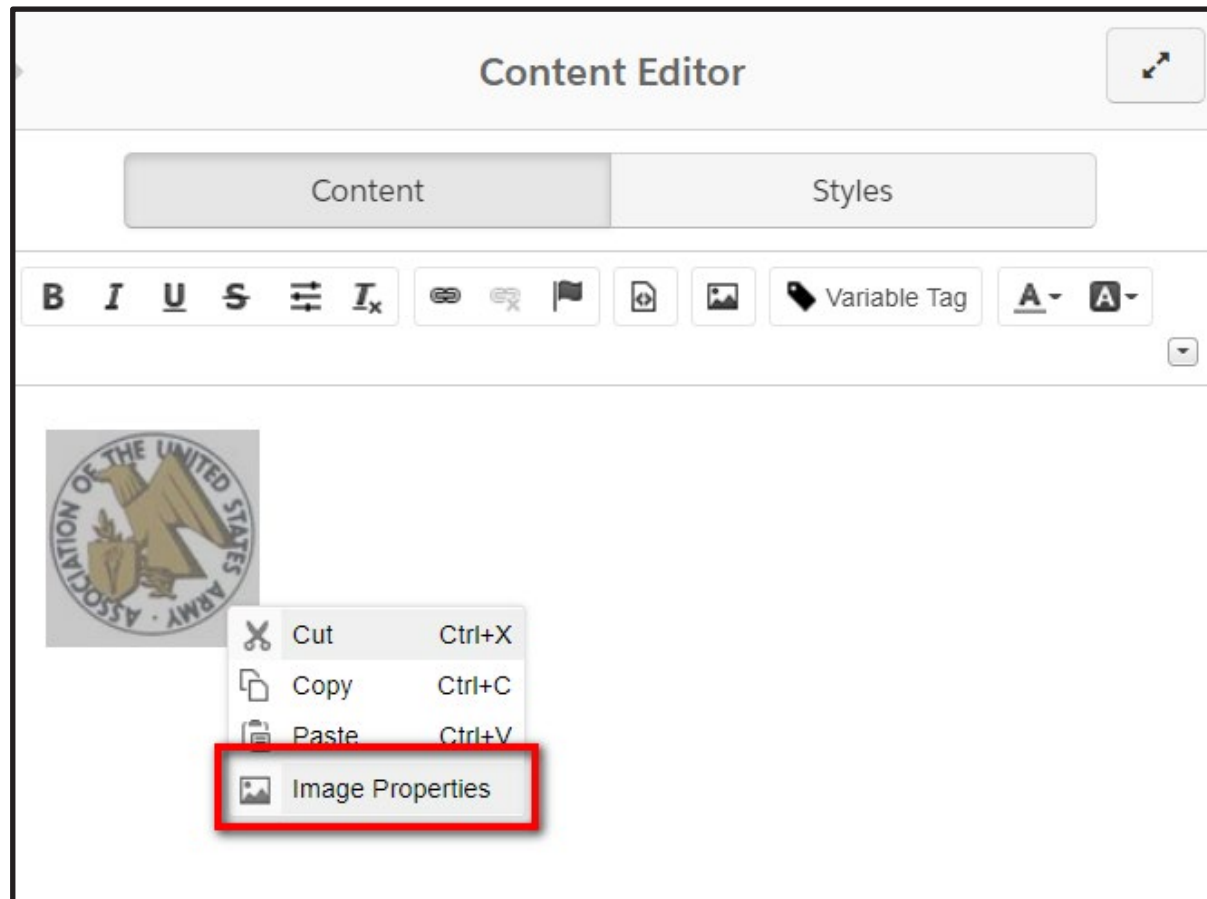
TESTING

Send to Test Lists/Send to Individual Emails
You are able send your email to yourself and others to make sure everything looks good before sending. You will receive both the HTML and 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 have a list of members who you want to send your emails to before officially sending, please send this list to Gwen Bobst, gbobst@ausa.org

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 the emails addresses here and click Send.

Rendering Tests

Running a rendering test allows you to see how your email will appear through popular email programs. It also tells you if your email will pass through spam.

1. Click the blue **New Render** button and wait about 5 to 15 minutes.
2. Click the **refresh** button occasionally to see the rendering status.
3. When complete, click the text in **this section**. The rendering results will appear in a pop-up window.

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 |

SENDING

In **Sending**, you will fill in the **To**, **From**, and **Subject Line** sections.

Remember to 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.

You are now ready to schedule your email!
To the right of your screen, click **Schedule** and select the date and time you want to send your email to be sent out.

Click on the calendar icon to select the day.

Click on the clock icon to select the time.

REPORT

Your email's report provides important data such as deliverability rate, bounce rates, who opened the email, etc.

1. Go to **Marketing** – **Emails** – **Sent**.
2. In **Filter**, type in the name of your email and select.
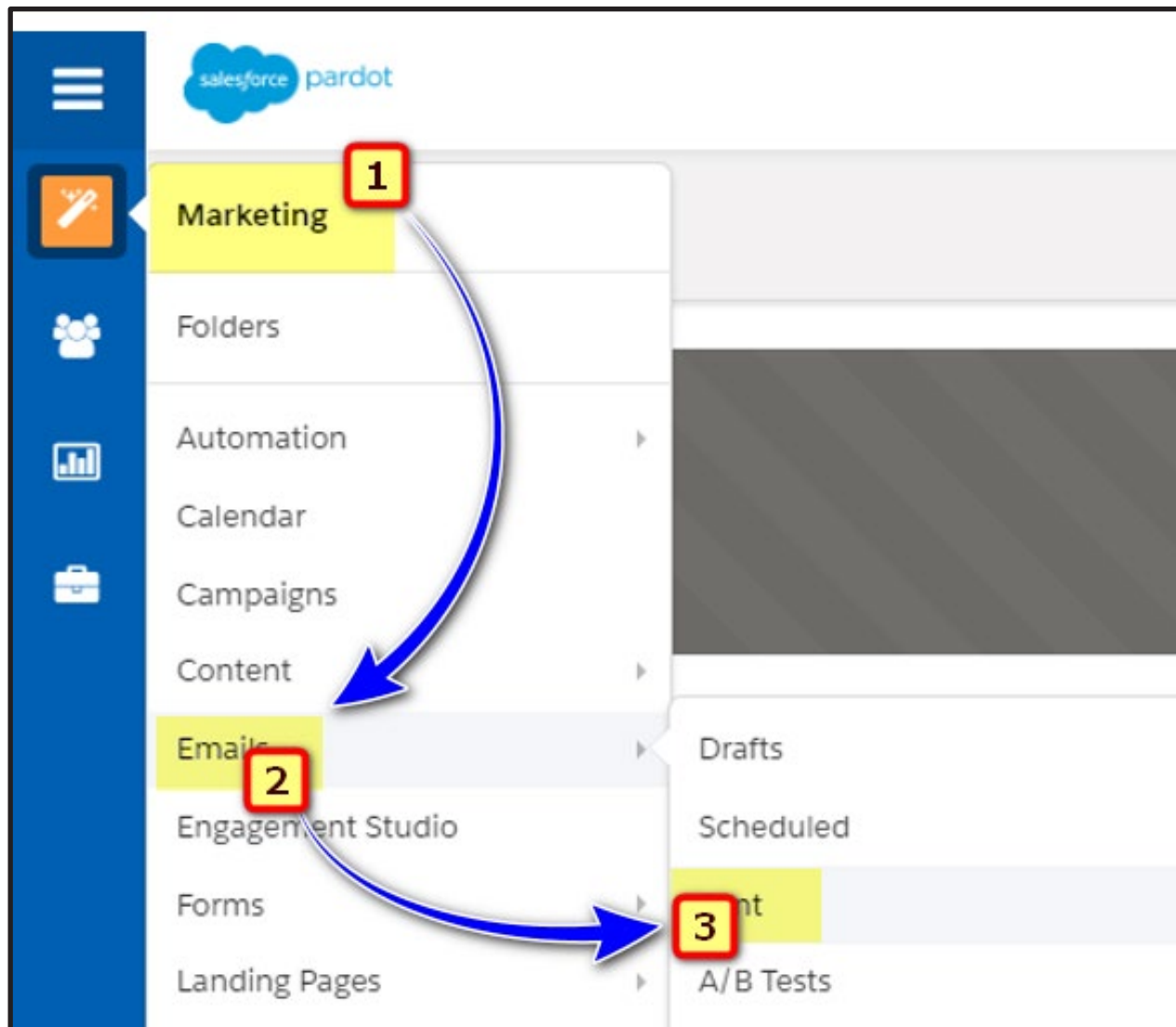
3. In the upper right-hand corner of your email's overview page, click **View Report**.

In your report, there are four sections of data that you can explore: **Report**, **Click-Through Rate Report**, **Interaction**, and **Email Clients**.

REPORT

This provides a good overview of your email. It provides standard data like deliverability rate, bounces, etc. Any text in blue on this page is an active link you can explore.
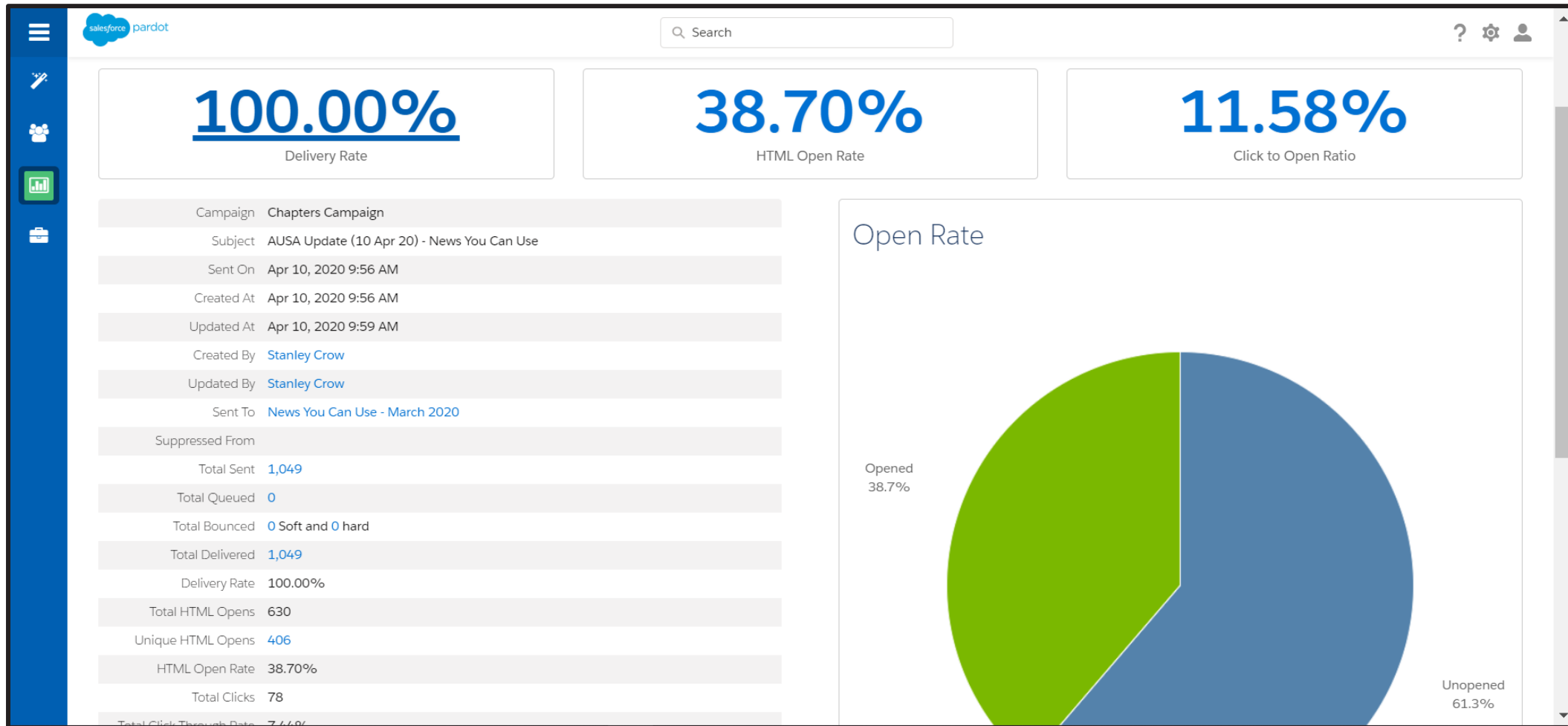
CLICK-THROUGH RATE REPORT
This allows you to see the percentage of who clicked on your embedded links.
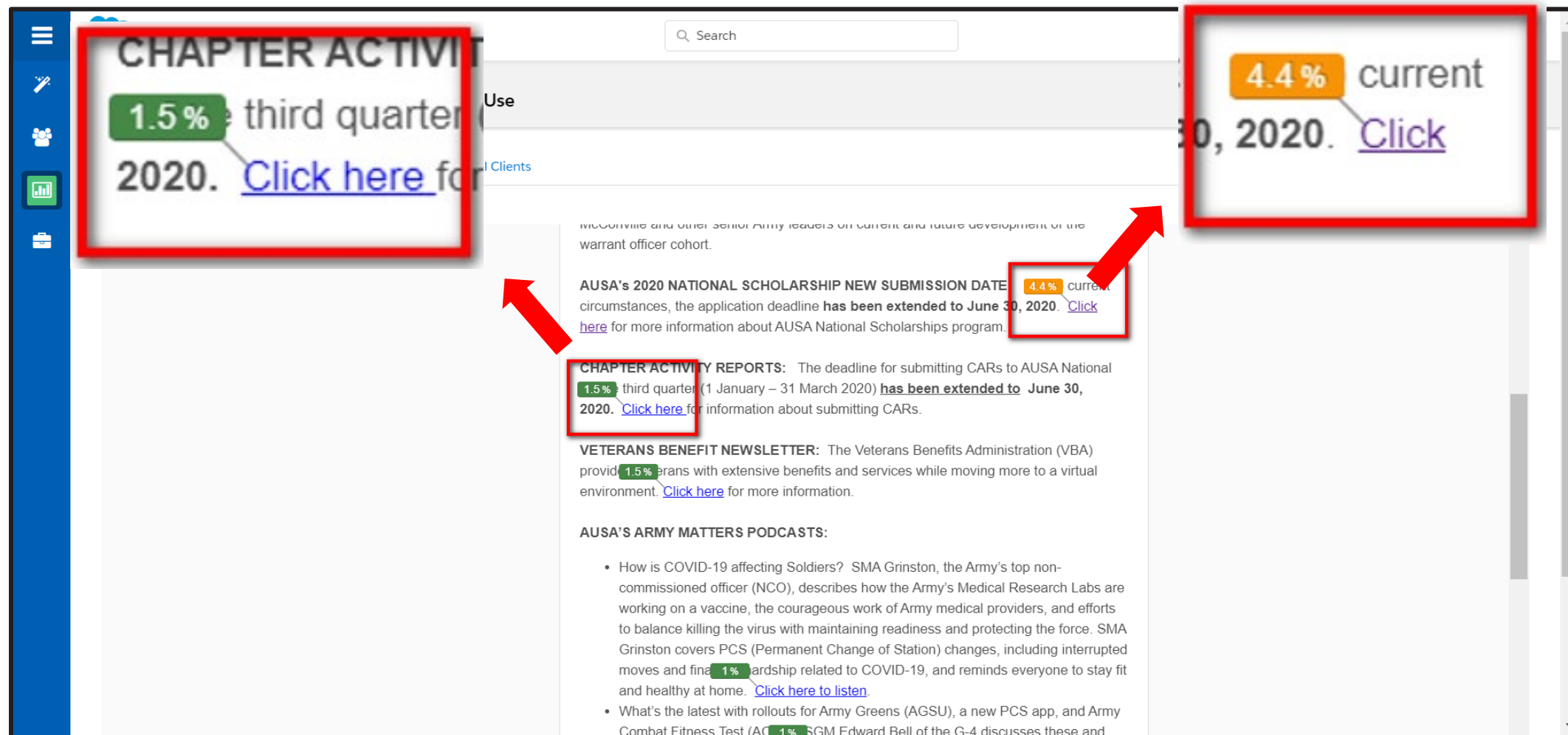
INTERACTION
This allows you to see how long people spent reading your message.
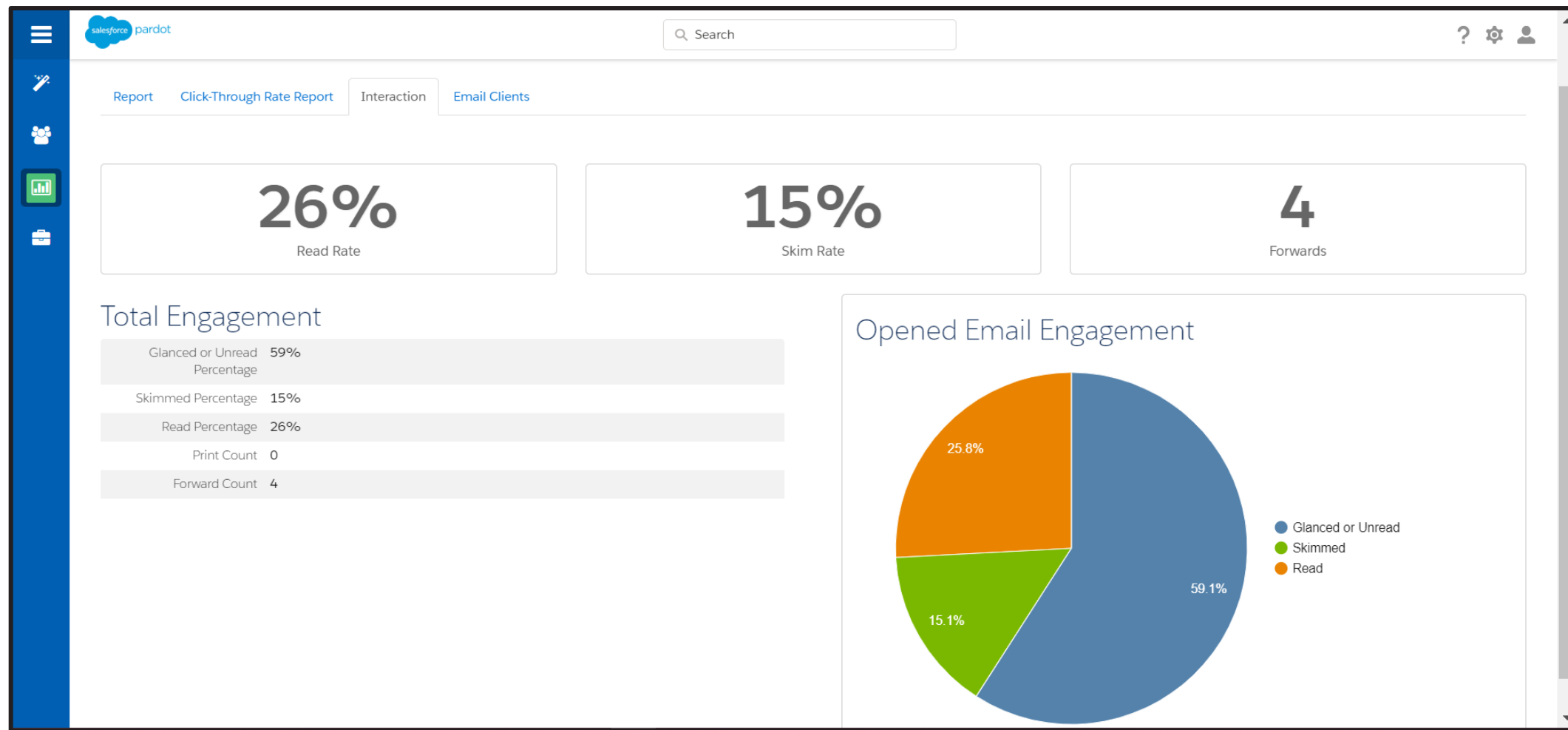
EMAIL CLIENTS
This provides information on what email clients your members are using to read your message.

NOTE: This is useful information to check whenever you run a rendering test. The email clients that are used by the majority of your members are the ones you should pay extra attention to in rendering to make sure they look perfect.
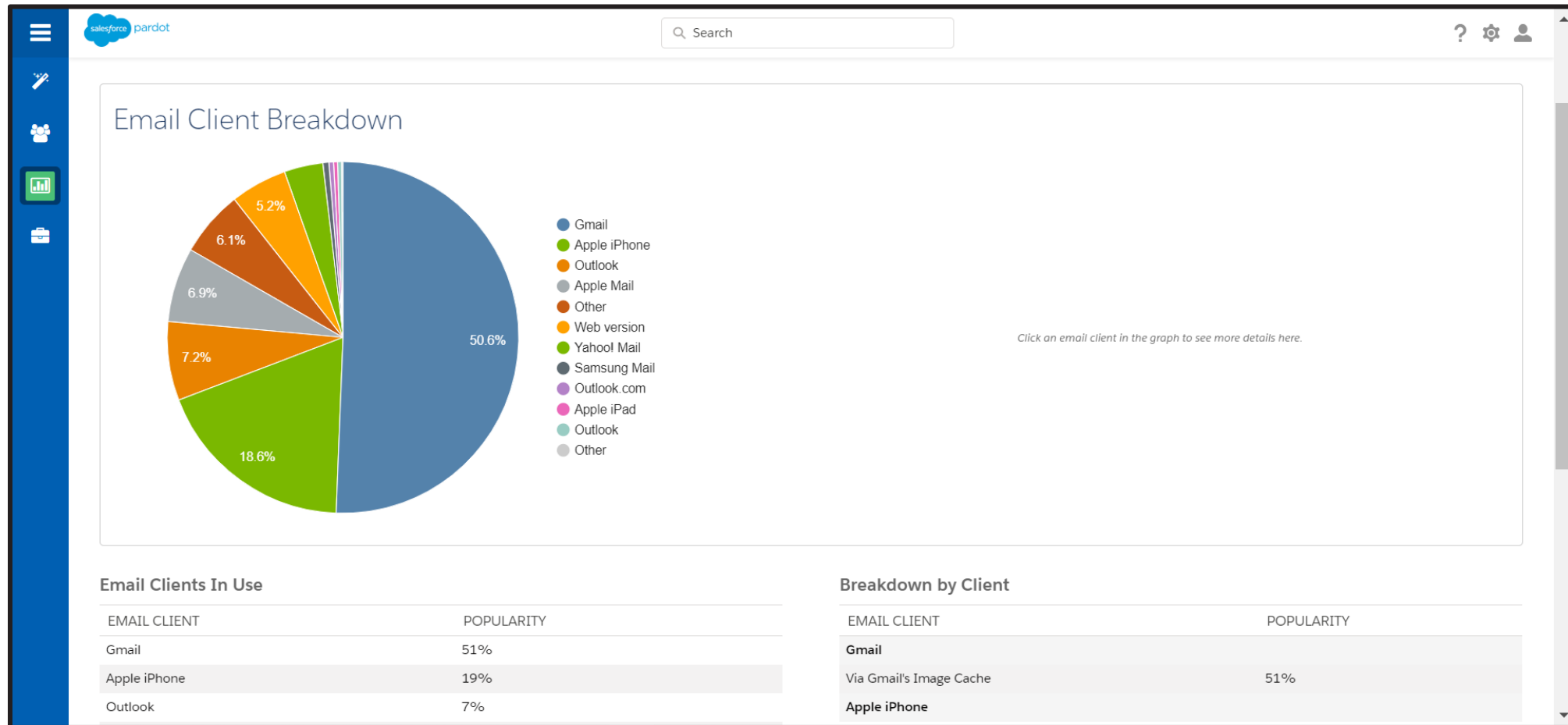
If you would like to set up a training session or have any questions, please send them to:

Gwen Bobst, gbobst@ausa.org

Pardot Troubleshooting Tips

Problem	Causes	Solutions
Low mailable rate for email lists	1. This is caused by an email list having many unmailable prospects - list members who have Opted Out or are marked as Do Not Email due to Hard Bounces.	1. Review the "Unmailable" members of your email list to see if any of them stand out to you that may be interested in receiving emails. Contact those prospects to confirm they are still interested. If they are, contact Stan Crow or Gwen Bobst so they may review the email list and update these members' records.
Member not receiving emails and/or is listed as unmailable	1. Member coded as "Do Not Email" Had 5 "Soft" bounces = "Hard" bounce = "Do Not Email" 2. Member selected "Unsubscribe" or "Opt Out" 3. Member has incorrect email address in Pardot	1. Contact Stan Crow or Gwen Bobst to update the Pardot record to "Do Email." 2. Contact Stan Crow or Gwen Bobst to "subscribe" or "Opt In" member - include the member name, email address, and which email list. 3. Contact member by phone or mail and request member send current email address.
Member receiving some but not all emails	The Member opted out of certain emails by updating their email preferences.	Confirm with member which National email publications they want to receive and then contact AUSA (Gwen Bobst/Stan Crow) to update individual's email preferences.
Emails not rendering correctly or not as expected	The chapter user may have changed the template too much and compromised coding.	1. Create a new email using the same template. Do not change html coding. Have no more than 4-5 images in the email. 2. New chapter templates have been updated to fix Outlook rendering issues. Contact Stan Crow or Gwen Bobst if sent emails displayed incorrectly.
Links in emails are not rendering correctly – shows full URL instead of text	If the URL is not linked to text, it will display as a Pardot URL, but still work correctly when clicked.	1. Use linked text instead: highlight the text, click the chain/link icon in the email editor, and enter your URL in the popup. 2. Do not use vanity URLs.
Message comes back with low delivery rate	1. One cause is sending an email with a "Sending address" other than "ausa.org". System detects that the sending address domain is different and does not allow the email to be received. 2. Too many images in one email. Email clients look for image-to-text ratio of an email . If there are too many images, the email is thought to be spam.	1. Ensure that the "Send From" address is an "ausa.org" domain. 2. Adjust text-to-image ratio by reducing number of images. We recommend no more than 5 images in a message.

Pardot – Frequently Asked Questions:

What is Pardot?
Pardot is a software as a service (SaaS) marketing automation platform by SalesForce that AUSA uses 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 Association Management System (AMS) 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).
- 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 users adapt to the new system. Currently, 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 member's email.

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 in late 2020. At that time, chapter users will be able to access their chapter's "dynamic" membership email list without assistance from AUSA National. 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. Select the one you are interested in checking and dropdown the list under the text "View:", click on "unmailable prospects" 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?
Go to "Marketing" > "Emails" > "Drafts." 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.

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, 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 patricular 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?
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.