SQLWorks

Title of document	How to use mailshots for your email marketing campaigns.
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Date Created	23rd September 2021

Purpose

This procedure explains how you can cleverly integrate your SQLWorks contact data with your businesses marketing material. Using Mailshots, data can be captured and pulled across from other modules in the software and used to send customised designs and marketing content to your client portfolio.

With built-in design tools, and formatting options, the content that can be created is left to your imagination, managed, and saved within SQLWorks.

Scope

This procedure applies to all Lineal Software Solutions staff, as well as any prospective customers or clients who intend to utilise SQLWorks within their business environment.

The procedure is aimed at the end user, who will be operating the SQLWorks client and is especially useful to those in marketing and design departments in the organisation.
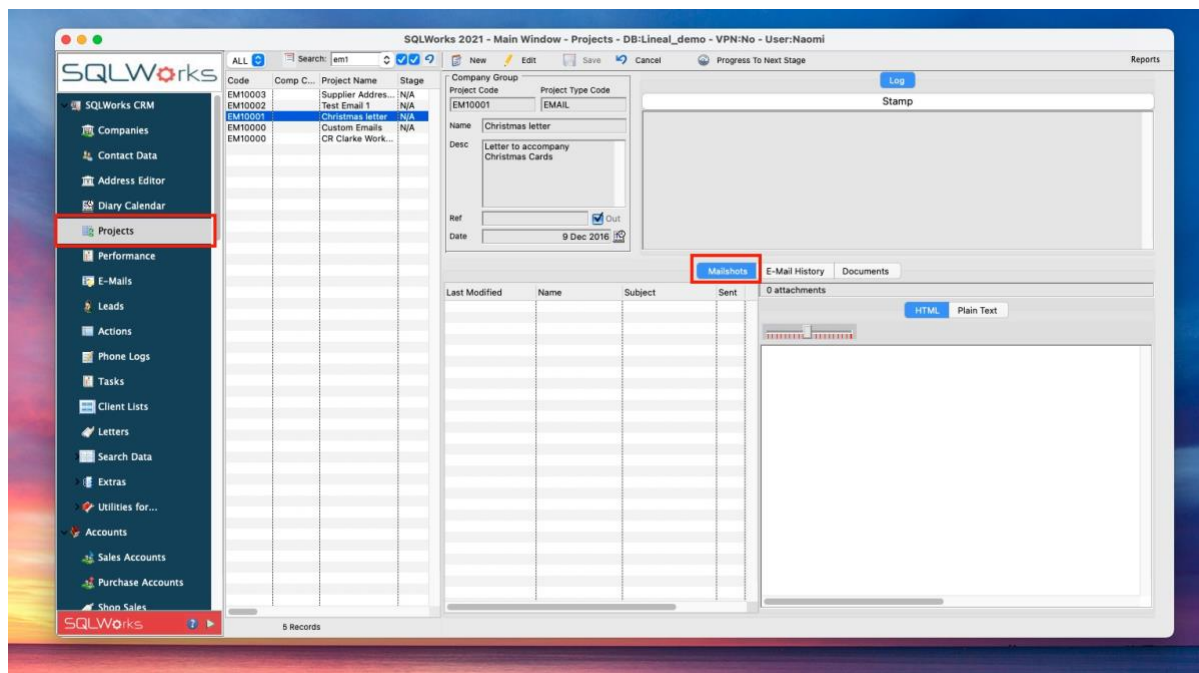
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Change History:

Date	Version	Created by	Description of change	Approved by
23.09.21	1	Naomi Joachim		

Where to find Mailshots

If you have an email account linked to your SQLWorks user, you can use its mail shot function to create, manage and send marketing material directly from within the system.


Found within 'SQLWorks CRM', under 'Projects' on the main nav bar - you can customise marketing content on the Mailshots tab, to send out to your client database. To use mailshots, you will need to set up a project type to manage them within the Projects section. This can be created from the "add email campaign project type" button in the CRM utilities window, alternatively contact SQLWorks support to get this set up for you

Via a right click in the lower table on the right you can select 'New Mailshot'. From this dropdown menu, there are also options to Edit or Delete existing campaigns and to Test and Send your Mailshot - we'll come back to these options later.

Once a new creation window has been opened you can start to design your mailshot. From the Formatting palette on the right, you can choose a whole range of tools to assist with your creation. From a range of fonts and text sizes, colours, bullet points and alignment, you can also insert images, tables, and attachments. There are also some editing options in the tool bar above the design window.

You can amend sections of your mailshot by highlighting them and clicking the format buttons, and confine the margins of your email by setting these measurements in the 'Document' tab. For tidy formatting, we recommend creating a borderless table in which to align the elements of your marketing email. This ensures any custom designs are displayed consistently in your recipients' inboxes.

Setting mail shot parameters
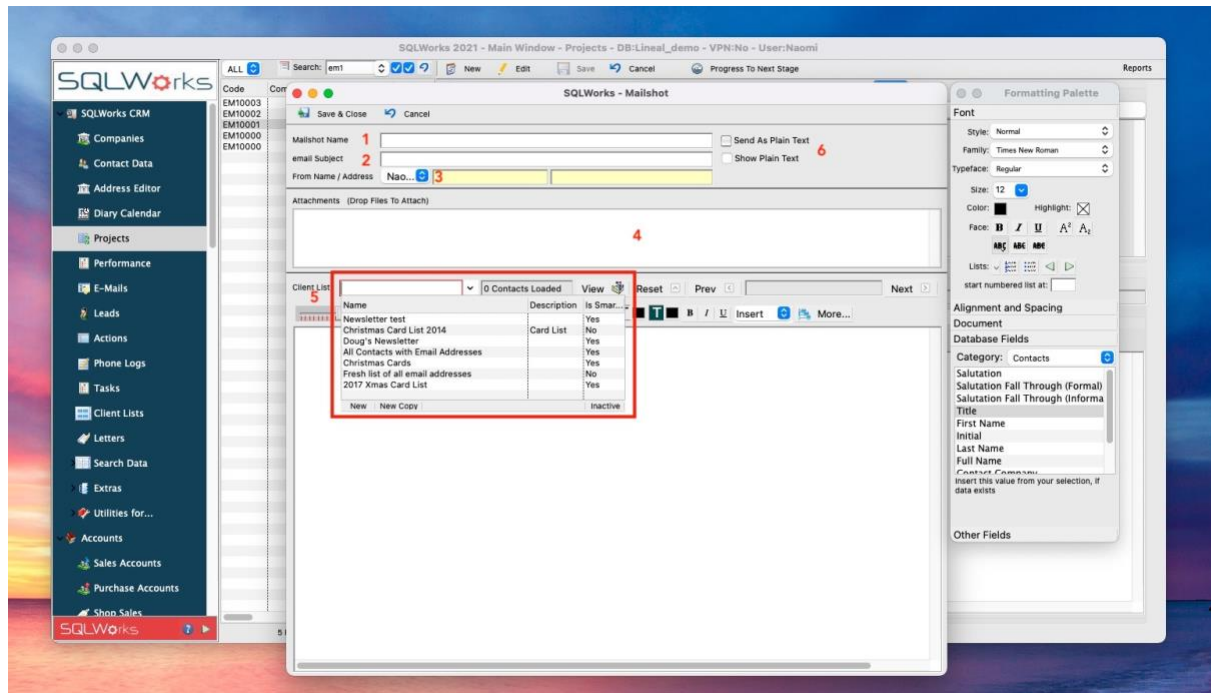
1. Give you Mailshot a unique name, this will be the name for internal reference

2. This is the Mailshot subject line that will be displayed to your recipients

3. Set who the email is from, this will default to your user email address, but you can amend this if you wish. The dropdown lists all users in your SQLWorks database should you wish to choose another saved user in your company. Or you can type the 'from name' in the left box, Lineal Marketing for example, and the 'email address' in the right, such as marketing@lineal.co.uk or hello@lineal.co.uk for example.

4. Attachments can be dragged into this box, and will appear on the email as an additional document - this may be useful for pricing sheets, brochures etc.

5. Client list is who the mailshot will be sent to - From this dropdown you can select from one of your custom client lists, which you can build from your saved SQLWorks CRM contacts. For help on how to do this see our guide on client lists, https://www.sqlworks.co.uk/fact-sheet-client-lists/

This will automatically load your list, and the number of contacts in that list will show in the box to the right. You can View the list, or create a new list should you wish, there is also an option to create a 'New copy' of an existing client list, should you wish to use a list as a template and make changes. The buttons to the right of the client list works in conjunction with the client list and the Database fields. You can use the 'Next' and 'Prev' buttons to cycle through different names, reset returns to the text which will be replaced by names.

6. The tick boxes at the top are for if you wish to remove all formatting and send your email as a 'plain text' email to improve chances of deliverability. Simply tick the 'Send as Plain Text' checkbox at the top of the Mailshot window. Using the 'Show Plain Text' checkbox, you can also check how this email is likely to be seen by your recipients.

Formatting Palette

The palette which opens automatically on the right, can be used for all your design needs. It can also be accessed by clicking the 'More' button if the palette is not visible.

From here as previously mentioned you can change the font size, style and colour as well as much more. You can use the 'Alignment and Spacing' options to help layout your email to ensure consistency when the email is sent. You can set and amend margins and add and manage header and footer details in 'Document' settings should you wish.
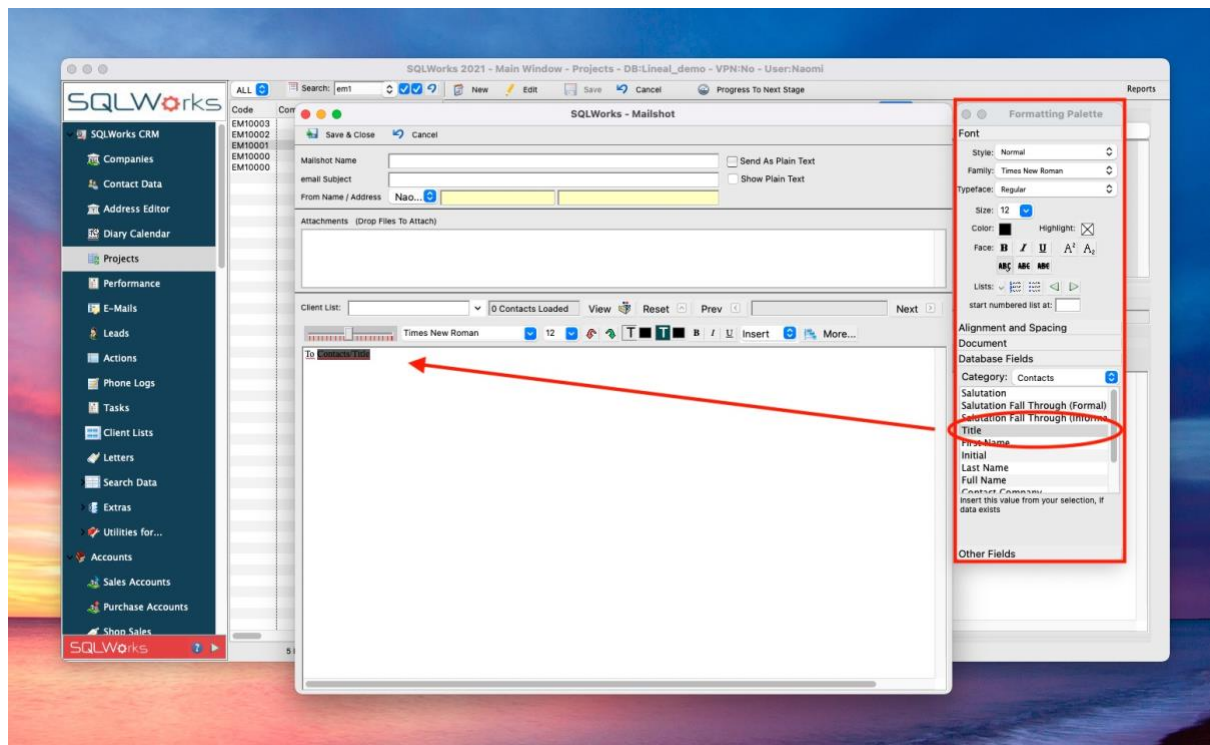
Within the Database Fields section, tags can be input into the main email body so that each email contains mail merged custom data from elsewhere in your contact directory. This can be used for targeting with 'informal' detail (e.g.: a first name – 'Dear John') and a "fall-through" function which pulls in substitute data as a 'formal' backup (e.g.: surnames – 'Dear Mr Smith') where the main data is unavailable. These functions can be customised by our SQLWorks development team.

Editing inserted objects

To assist with the layout of your email you may wish to insert a table or image, these options can be selected from the 'Insert' dropdown. Once added into the document you can make changes and control these via the right click dropdown menu.
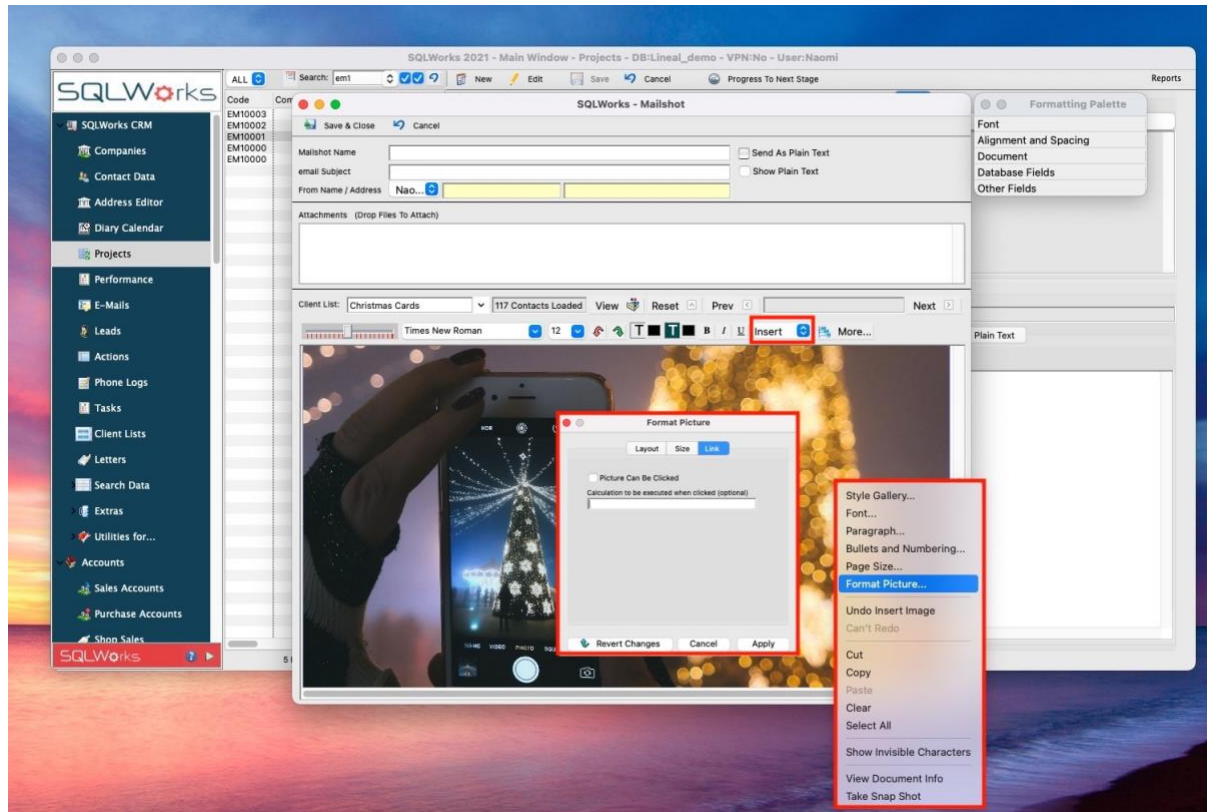
You can choose to insert, email or web links directly, text boxes, tables, and images. Once the object is in your mailshot editing window you can make changes directly. The right click options have some generic editing options such as font and paragraph spacing, but there is also formatting options specific to the object inserted.

You can amend the layout, size etc. and for images, you can insert a clickable link to direct your recipients to a web page or alternative location from the mailshot itself. This is useful if you are promoting products or items perhaps or want to bring attention to additional information on your mailshot topic.

Testing & sending mailshots

Once you have saved your mailshot it will be listed in the table of that project. A preview will be on the right and like the design window you can use the slider to zoom in and out. To trial how the email will look to your recipients you can send a test email via a right click.

This will prompt you to enter the test recipients email address, which may be your own, or could be more than one if you wish, email addresses to be separated by a comma.

To send your mailshot to your client list, select Send Mailshot from the right dropdown menu. This will automatically send your email out to all members of your chosen client list and will show the number of recipients it has been sent to, in the 'Sent' column. The last modified date will update to the latest date any change was made to that record for future reference and the mailshot information stored in the SQLWorks database.