Higher Logic Informz

Basic

Training Manual

Q1 2021

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Welcome

Welcome to the Higher Logic Academy Informz Basic Training. The Higher Logic Education Team is thrilled that you were able to join us today. We hope that you find this class useful, interactive and that is helps you create. We thank you for taking time to **#LearnTogether** with us today.

Navigating this Course

Success Checklist

Resource

Helpful Hint

Course Description

This one-day course provides an in-depth study of the basic features and functionality of the Higher Logic Informz platform. It will provide you with the foundational technical skills and engagement strategies necessary to succeed with email marketing.

You will learn about the **New Admin Experience: Higher Logic Informz** via hands-on exercises and access to a sandbox site to practice your technical skills. You will learn to manage contacts, create custom message templates, design, test and send messages, basic metrics and reporting, and creating landing pages.

Course Objectives

After completing this course, you will be able to:

- Navigate your Informz account.
- Manage contacts, upload list of contacts, and create and manage groups of contacts
- Create custom message templates with default branding of your choice.
- Create, test and send messages to groups of contacts. You will understand design best practices, important information for deliverability before sending your messages to segmented groups of contacts.
- Pull and analyze reports for contacts and messages as well as establish benchmarks for success.
- Understand landing page basics and learn how to update and customize your unsubscribe page.

Pre-Lesson: New Admin Experience

This Pre-Lesson provides an overview of the New Admin Experience for Informz

Informz | New Admin Experience Resource Center:

https://hug.higherlogic.com/helphome/iznewadmin

Glossary of Terms

E-mail Terms

Email Client – the platform a contact is using to access and manage their email, in example – Outlook, Gmail, Yahoo.

Groups – segments of email contacts based on commonalities such as demographics or action-based items like opening a specific email or clicking a link

Friendly from – user-defined names that identify the sender to the contact via an email client. In example, a user might choose to input Jane Jones as a friendly to replace jjones@higherlogic.com.

Soft Bounce – A soft bounce generally occurs for a reason such as a mail server being down, a server temporarily not accepting mail, or a contact inbox being full. You can generally resend a message to contacts that soft bounced at a different time to ensure that they receive your message.

Hard Bounce – A hard bounce generally occurs for a reason such as the domain not existing, the domain not having a server, or the email of the contact no longer exists. These addresses cannot receive a message because there is no place/address to receive the message.

GDPR – An abbreviation for The General Data Protection Regulation which directive and rules concerning the protection of personal data in the European Union

A/B Testing – a randomized experiment two variants, A and B. Could apply to subject lines, content within a message, or groups.

Campaigns – an automated sequence of communications sent to a contact based on some event or criteria.

Design Terms

HTML – a programming languages for creating web pages and web applications

RBG – (red, green blue) is a system of representing colors for web display

Hexadecimal/Hex Codes – a six-digit code for web colors that corresponds to RGB values

Padding – property of space around elements or content in a message

Lesson 1: Contact Management and Segmentation Lesson Description

Learn how to use the manual contact management tools in Informz. Learn to create custom profile fields, add a single contact, upload and map lists of contacts, manage existing contacts and create groups (interest, demographic, personalization, action-based, and compound). Also learn basic concepts for 3rd party integrations.

Lesson Objectives

After completing this lesson, you will be able to:

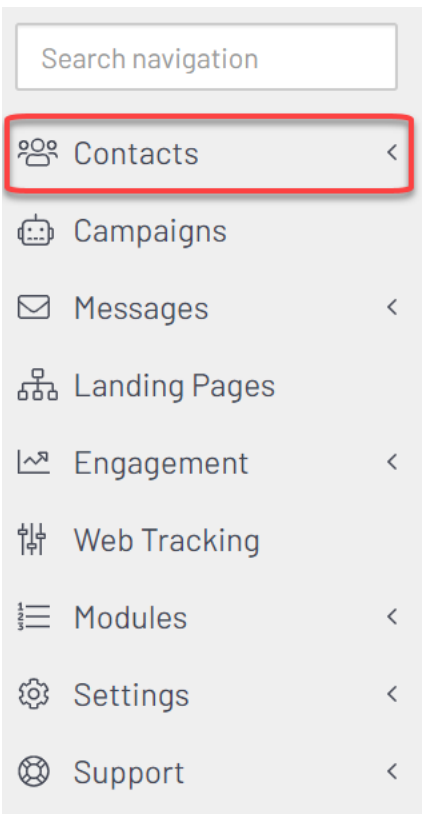
- Create custom profile fields
- Add a single contact
- Upload and properly map lists of contacts
- Manage existing contacts
- Create segmented groups within your account
- Understand basic 3rd party database integration concepts.

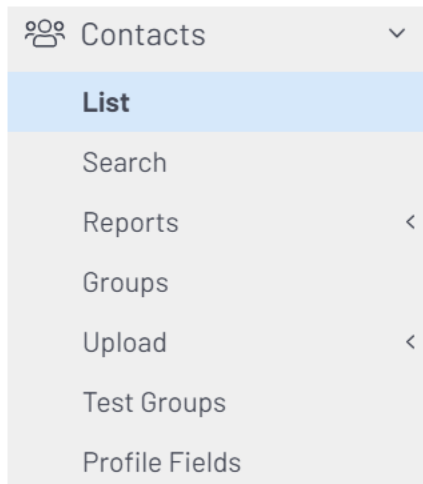
Lesson 1: Contact Management and Segmentation

How are new contacts added to the account?
How are contacts managed?
What if I have an integrated database?
How do I create and manage groups of contacts?

Contacts

Expanded Contacts Menu





Located:

Left Menu > Contacts

Managing Contacts and Segmentation

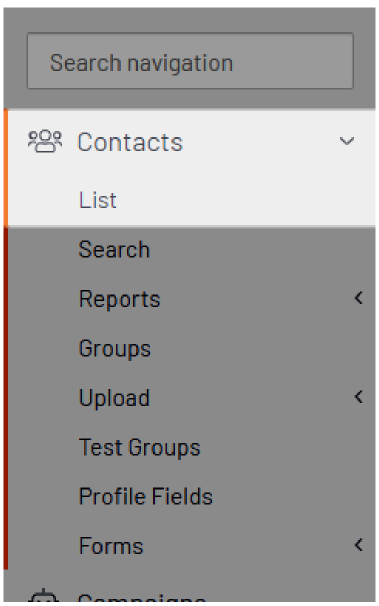
Contacts

The **Contacts List** is where you manage those who have subscribed to your organization's messages. Contacts don't necessarily have to be members of your organization; they could be people who have subscribed to your newsletter to stay informed of your organization's activities, for example.

This page has three lists, **Active**, **Administrator**, and **Unsubscriber**, that display contacts alphabetically (by email address), along with details like their status and subscribed dates. You can add and edit contact records and perform other administrative actions to keep your contacts organized.

To manage your contacts:

1. Access the Admin interface.
2. Navigate to **Contacts > List**.



TIP: On list pages, click a column header to sort on that column. Click the columns count below the list to add and remove columns in the current view.

Integration Concepts

Whether you are using an external database or manage lists in your Communications Professional account, contacts are the real people whose email addresses you've collected, plus any other data, such as company, job title, department, and employment anniversary date.

Many organizations leverage a third-party database that integrates with their MA Enterprise account. This integration allows for an automatic syncing of data between the external database and the MA Enterprise account. Any third-party database should always be considered the authority of data (i.e., the database of record) so that it can then flow into your account.

Integrations with our system allow for a two-way flow of data.

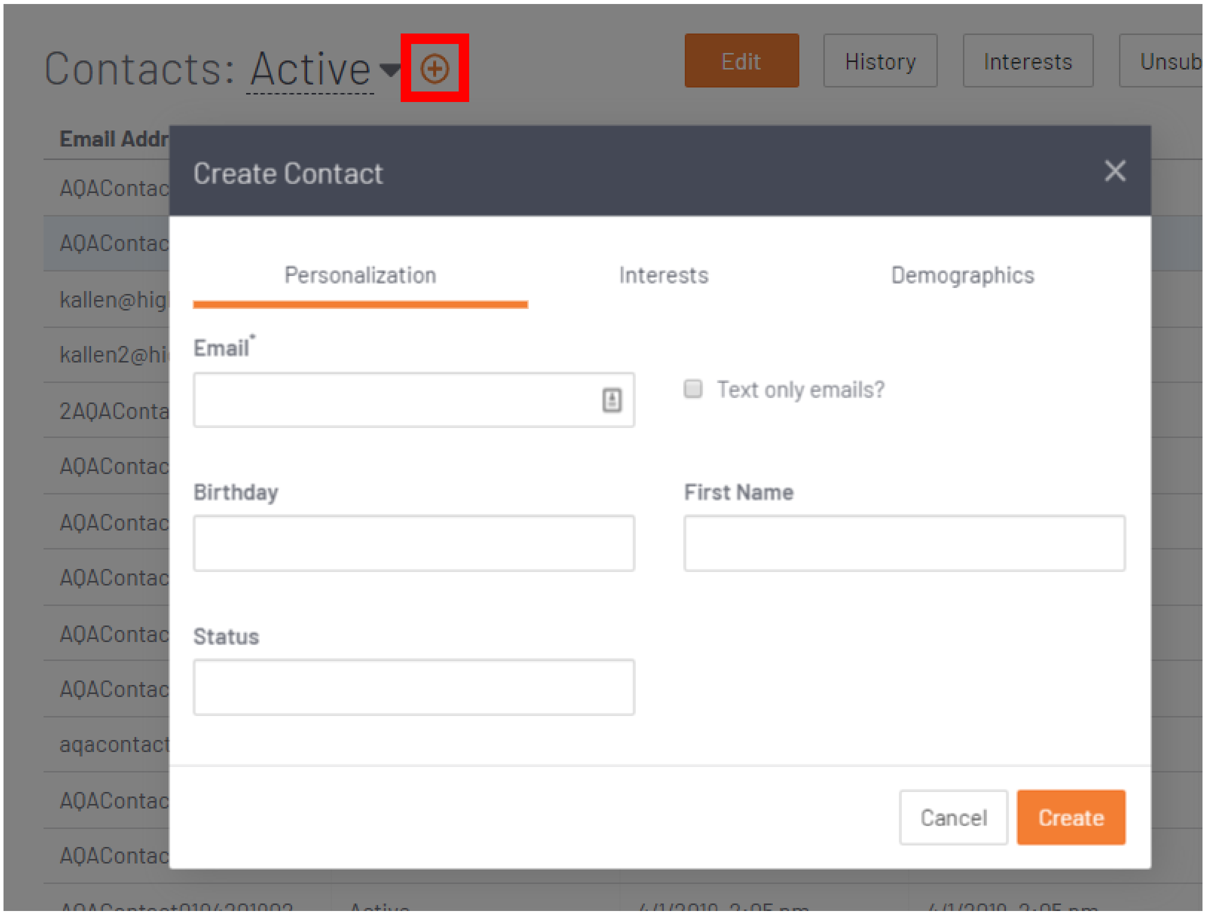
- Contact data (e.g., email addresses, first name, expiration date, and groups to which they belong) comes into your Communications Professional account.
- Tracking data for each contact flows from your Communications Professional account back to your external database.

  This includes information such as which emails a contact opened, links clicked, and other activities that occurred in the Communications Professional account.

Overall, integrations can assist with automating more functions in your account, as well as for campaigns you'd like to run.

Manual - Create a Single Contact

1. Click the **plus sign** to the right of the page title.



2. In the resulting dialog:
    a. Enter the contact's email address (this is the only field you're required to complete).
    b. If this contact should only receive text-only emails, check the corresponding box.
    c. If applicable, you can fill out various **Profile Fields** for this contact on their associated tab (Personalization, Interests, and Demographics).

Manual - Profile Fields

Field Types

You can create the following field types:

Personal Information - Accommodates a variety of data types. It's used as a personalization field in messages, and can be used for targeting too.

Demographic Category - Has a limited set of values. A few examples would be gender, state, or country. See Demographic Category Profile Fields.

Interest - These fields help you to organize your contacts. They also enable you to build interest-based target groups to which you can send messages. See Interest Profile Fields.

Opt-outs - These allow contacts to indicate they wish to stop receiving a certain type of message, as opposed to universally unsubscribing from all your messages. See Opt-Out Profile Fields.

To manage your Profile Fields:

Access the Admin interface.

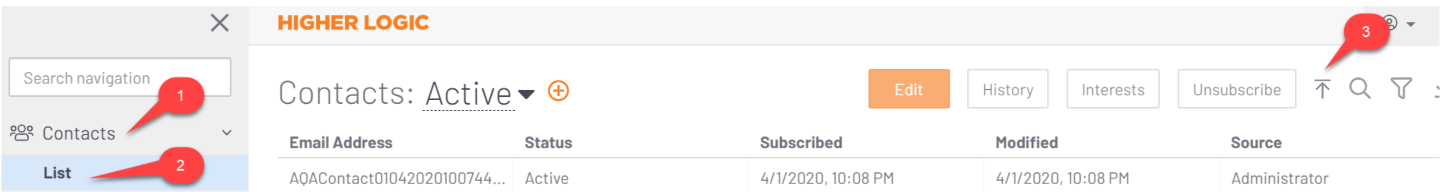
Navigate to Contacts > Profile Fields

Manual - Upload a List of Contacts

Upload a file

This will allow you to upload a file from your computer. Communications Professional cannot read a CSV file (such as Microsoft Excel), so ensure that your file is saved as a tab-delimited text file. Emails should be in the first column. If you are uploading more than email create a separate column for each field (department, state, etc.). The order of the additional fields does not matter as we will map them in the following steps.

Navigate to **Contacts**> **List** > **Upload** Icon



Step 1: Choose your Upload Method:

Option 1 (Recommended): Upload a file - This will allow you to upload a file from your computer. Select **Choose a File**, select the file from your computer.

Option 2: Enter email addresses - This will allow you to upload a list of email addresses. If you are uploading anything in addition email addresses, it is recommended that you upload with the Upload a File functionality.

Select your **Upload Source** from the associated menu. This will allow you to keep track of where the lists you are uploading are coming from.

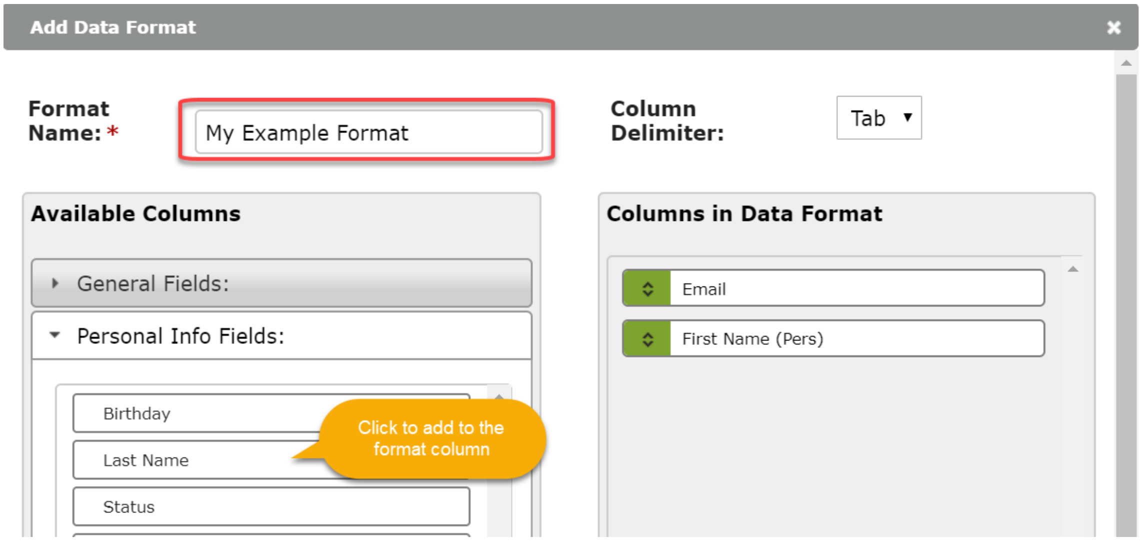
Click **Next**.

Step 2: Select or Create a Data Format

If you have no data formats previously saved, you'll need to create your first data format.

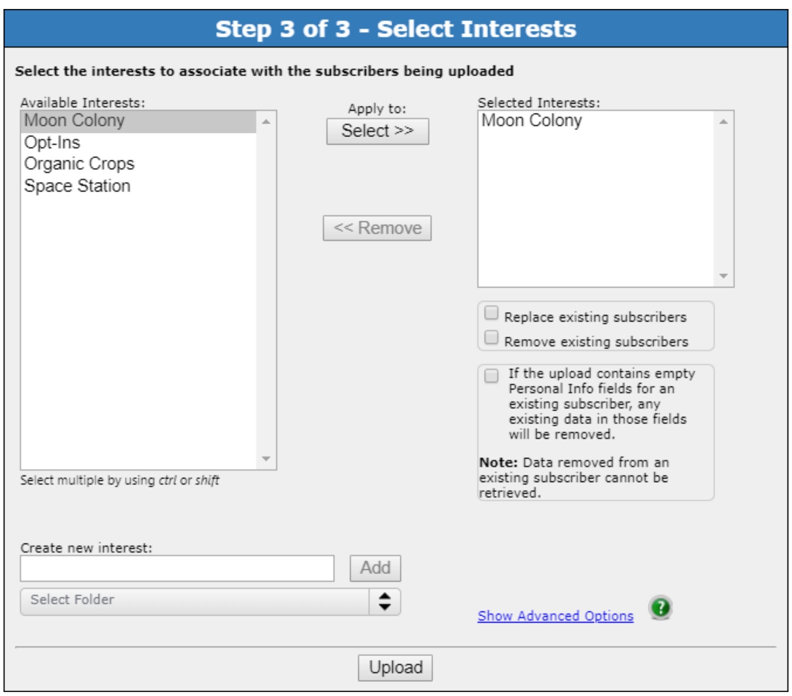
Select **Create Data Format**. If you have a saved format, you may choose the correct format for your file and move on to step 2.

Next, name the data format and click the fields to add them to the Columns in Data Format area. Do so in order or use the arrow keys to change the arrangement so they are in the order of your uploaded file. Email will be first by default.



Step 3: Select or Create an interest group

To add one or more interests:



1. Select the interest(s) to associate with the contacts you're uploading; there are two ways to do so:
   a. **Select existing interests -** Any existing interests are listed in the **Available Interests** box. To use these, click to highlight one or more and then click **Select >>** to move them to the **Selected Interests** box.

b. **Create new interest(s)** - At the bottom of the dialog is an area enabling you to add an interest on the fly. To do so, give it a name, select the folder where it should reside, and then click **Add**. The interest displays in the **Available Interests** box, where you can now click to highlight it and click **Select >>** to move it to the **Selected Interests** box.

2. The interest(s) you're going to associate to the contacts are listed in the **Selected Interests** box. After verifying this is accurate, click **Upload**.

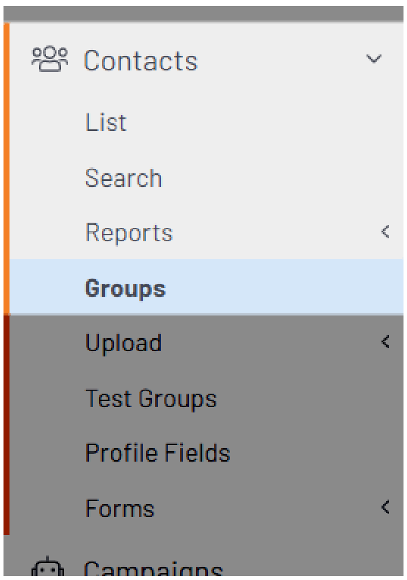
A confirmation message displays noting that your contacts are being uploaded. You'll receive a confirmation email when your upload is complete. Click **Click Here** to view the results in your **Upload History** (view by navigating to **Contacts > Upload > History**).

Groups Creation and Management

Once you've gathered a set of information about your contacts, you might ask yourself, "What do I do with this data?" A **Group** is a smaller part of your entire contact base - a subset of the whole built around commonalities that are then used to create that Target Group. For example, you can create a Group based on demographics (such as gender or home country) or personal information (such as city of residence or age range). Ultimately, a Group enables you to control and tailor your messages to these different sets of contacts.

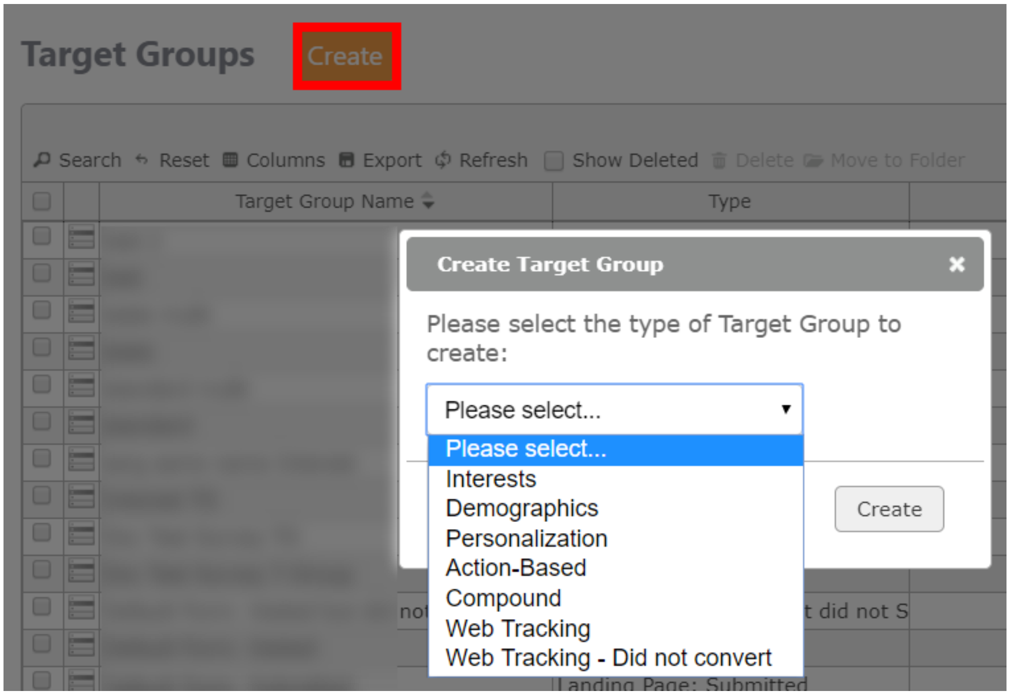
To access your Target Groups:

1. Access the Admin interface.
2. Navigate to **Contacts > Groups**.



Create a Target Group

To create a Group, click the **Create** button. You'll then need to select the **type** of Target Group you want to create.



There are five group types we will focus on this course:

Interest Groups let you manage your contacts according to their **interest preferences**

Demographic Groups organize your contacts based on their demographic attributes.

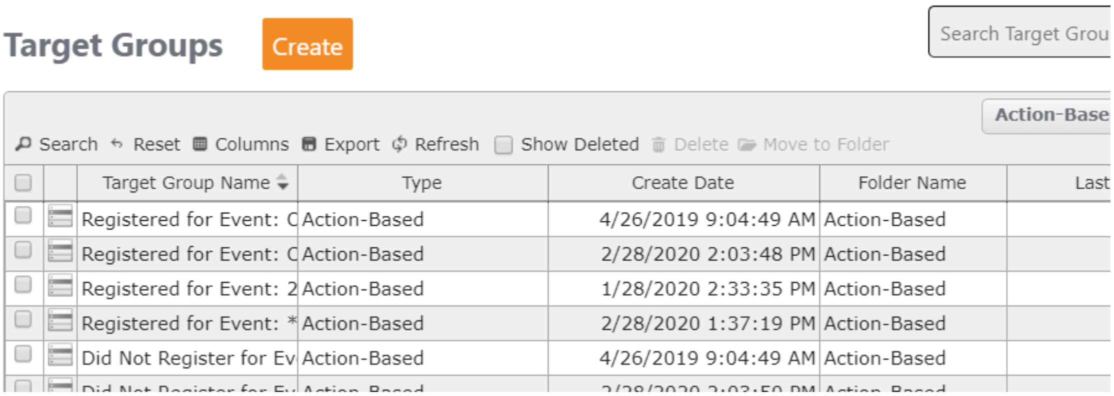
Personalization Groups let you focus your message around your contacts' personal information, which can be any details you gather about them

Action-based Groups enable you to target messages to a group of contacts based on their **activities** within Communications Professional.

Compound Groups enable you to combine two or more Groups into one, exclude contacts from a Group, or require contacts to meet the criteria of multiple Groups in order to better segment your list.

Manage Groups

The **Group** page lists all of your organization's Groups.



Search Click **Search** to display a dialog where you can search for a Group. Click **[+]** to add a search criterion, and configure it with the available filters. You can click **[+]** to add multiple criterion, if needed. Click the **Find**

Add/Remove Add/remove columns to customize the data shown about your Target Groups in the list.

Export Click **Export** to export the current list to an Excel file. This is a great way to share data with others in your organization. Keep in mind that exporting respects any search filters you have set, so if you want to only export specific Group information button to initiate the search.

Reset If you've performed a search, click **Reset** to set the list back to the original view.

Columns Click **Columns** to display a dialog where you can, be sure to perform a search first.

Delete Select one or more Groups by checking the boxes to their left, and then click **Delete**, followed by **OK** in the confirmation pop-up, to remove it.

Undelete Click **Show Deleted** to display any Groups that have been deleted (they're shown in red). If you want to restore a deleted Group, mouse over its menu and select **Undelete**.

Mini Challenges – Contacts & Groups

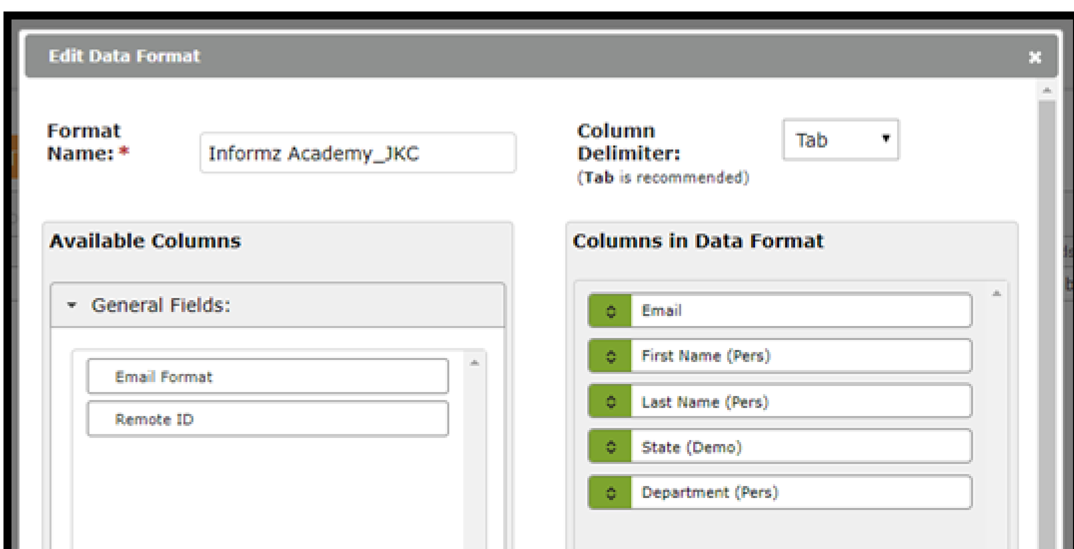
Mini Challenge #1
Contact Upload

Review list of Contacts

1. Go to academy.higherlogic.com/informzlist and access the "sample subscriber list"
2. After opening the file in your internet browser, right click and select "save as" and save the file to your desktop and name it **higherlogic_nonmembers**
3. Open the file and observe the column headers
4. Within your Communications account, navigate to **Contacts > Profile Fields.** Scroll through the list of fields in the menu and verify that there is a field to store the incoming data (First Name, Last Name, Department and State)

Upload Contacts
Navigate to **Contacts > Upload > Upload Contacts**
Click **Next**
Step 1: Choose Contact Upload Method
Navigate to **Upload Method > Upload a File > Choose File >** select file **higherlogic_nonmembers.txt**
Step 2: Select Data Format
Initially, no data formats exist in the account.

a. Select **Create New**
b. In **Format Name:** type "HL Academy [your initials]**"**
c. Click each personal info and demographic field needed to receive the incoming data *(note: the left to right order of the columns in the upload file match the top to bottom order of the fields in the* ***Columns in Data Format*** *list.)*



d. Click **Save**

e. Click **Next**

Step 3: Select Interests

a. In **Create New Interest type** “HL Academy [your initials]“
b. Select Folder: Main Folder
c. Click **Add** and the new interest appears in **Selected Interests**
d. Click **Upload**

Mini Challenge #2

Create a Personalization Group

1. Navigate to **Contacts > Groups.** Click on the **Create** button**.**
2. Select **Personalization,** click **Create**
   a. In **Group Name:** type “Product Department [your initials]“
   b. Click **Folder** dropdown and **select** Personalization, click **Next**
   c. Click **Personalization Fields:** dropdown and select **Department**
   d. Click **Values > Specific Value:** and type **Product Management**
   e. Click **Update**

Mini Challenge #3

Create a Compound Group

1. Navigate to **Contacts> Groups,** click on the **Create** button**.**
2. Click on **Group Type** dropdown and select **Compound**
3. Click **Create**
   a. In **Group Name:** type “NY Product Team Members [your initials]”
   b. Click **Folder** dropdown and select **Main Folder**
   c. Under **Select Existing Groups** select the personalization folder in the dropdown menu
   c. Click the “Product Department [your initials]” group
   d. Click **Include >>**
   e. Click the **Folder** dropdown again and select **Demographics**
   f. Click **State: NY** group
   g. Click **Include >>**
   h. Under Included subscribers, select “In All” to ensure to sort for subscribers who are in Product management AND NY
   h. Click **Create Group** to save the Group

Lesson 1: Summary

In this lesson, you learned:

- ✓ Integration basics
- ✓ How to add a single contact
- ✓ How to upload a list of contacts
- ✓ How to create different types of groups
- ✓ Basic contact management

Lesson 2: Custom Message Templates

Lesson Description

This lesson you'll learn how to create and manage branded templates to be used as a blueprint for your messages. We'll walk through how to use the Templates 2.0 Designer, setting default or locking template design elements, and setting up unsubscribe links.

Lesson Objectives

After completing this lesson, you will be able to:

- Understand what templates are and how to create one
- Set up a template with specific permissions locked or unlocked
- Implement basic design best practices.
- Understand basic compliance requirements before activating (publishing) a template.

Lesson 2: Message Templates

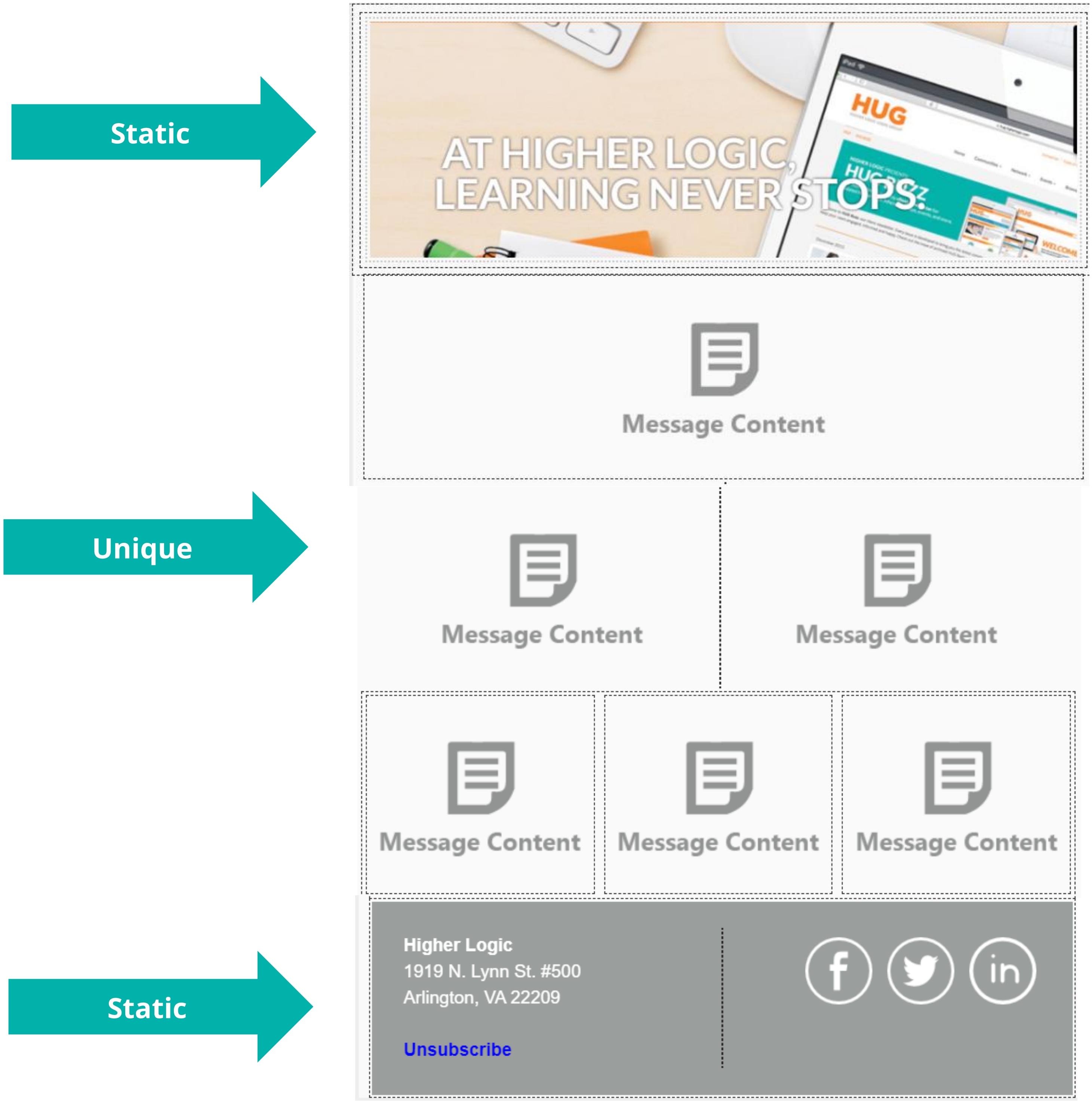
What is a message template?
What should I know when designing my own custom template?
How do I update and manage the templates I create?

What's Message Template?

Overview: Custom Message Templates

A template is the blueprint for a message. Message templates are a great way to create a re-usable "layout" that can then be the foundation for future messages, but also easily customized with single-use information, such as dates and locations. In this article, we'll take a look at managing your templates on the **Templates** page.

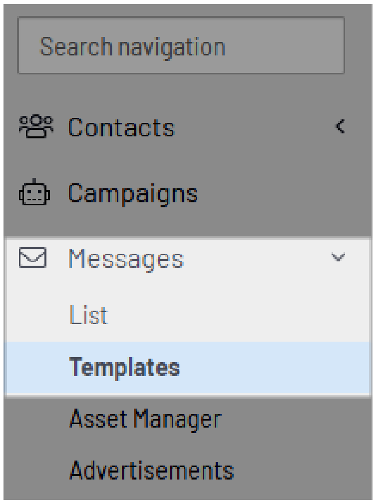
Designing Templates



Create a Template

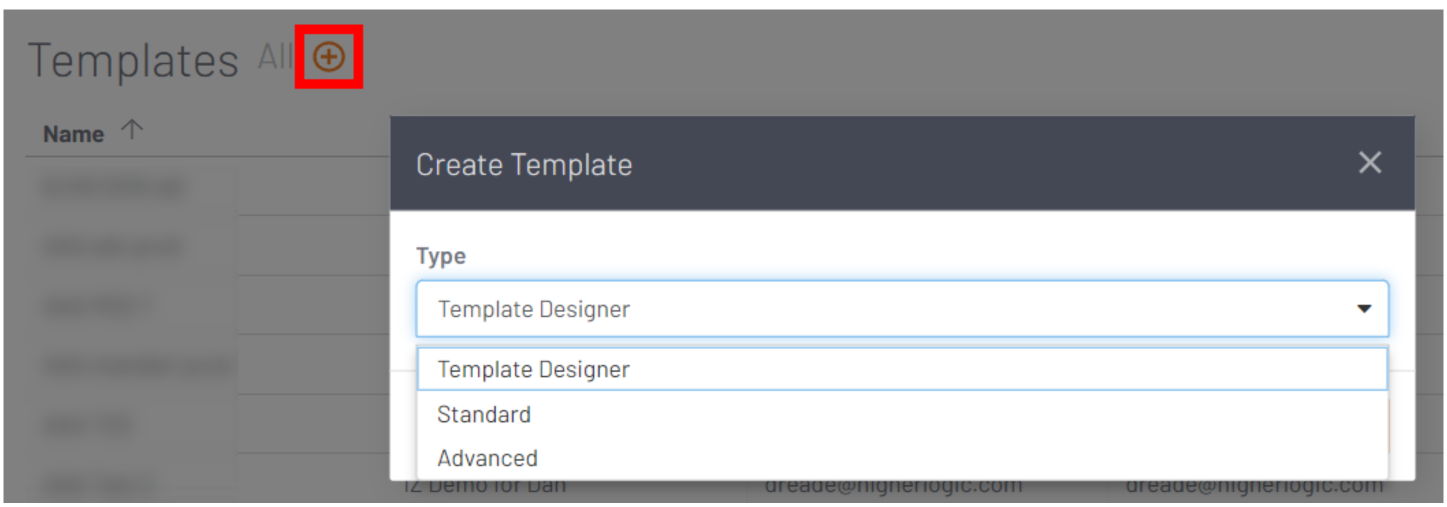
1. Access the Admin interface.

2. Navigate to **Messages > Templates**



3. Click the **plus** sign to the right of the page title.

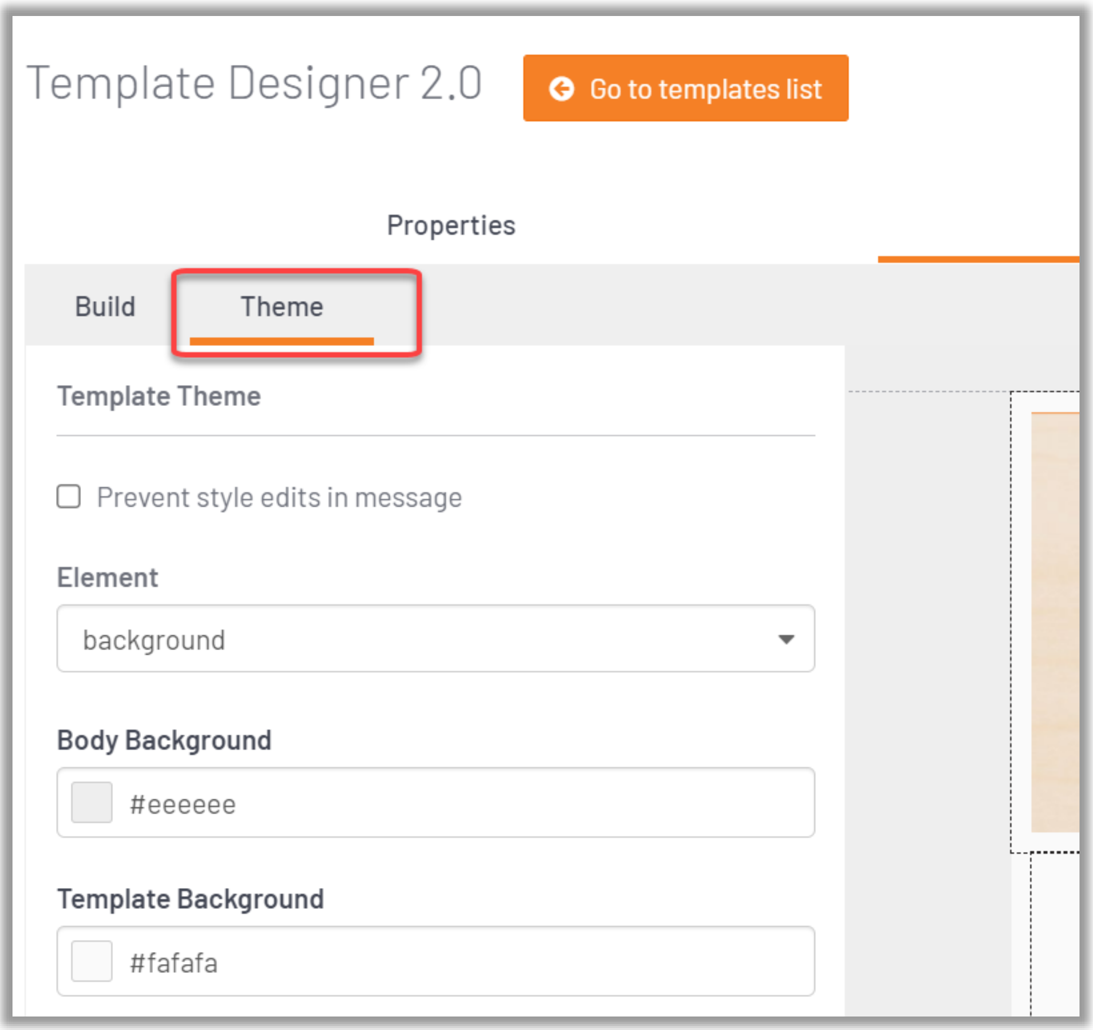
4. Select **Template Designer** - This is the latest (and recommended) editor, known as **Template Designer 2**.



Designing Templates: Template Theme

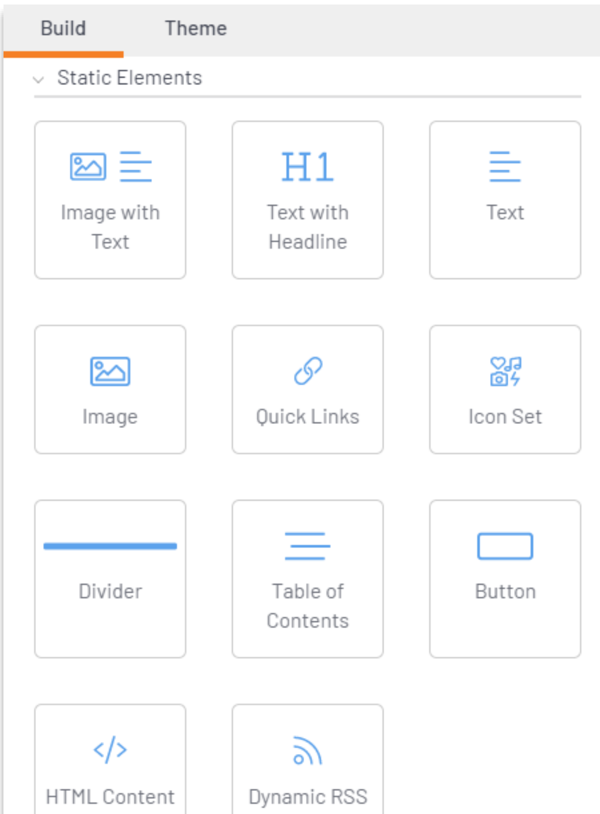
- Themes can assist with styling a template
- Defaults from the Theme can be applied to specific elements
- Controls how elements within a template are styled including:

  (Text Styles, Colors, Backgrounds, Width, Hyperlinks, Buttons, Lists)
- Themes can be **Locked** or **Unlocked** on the message level



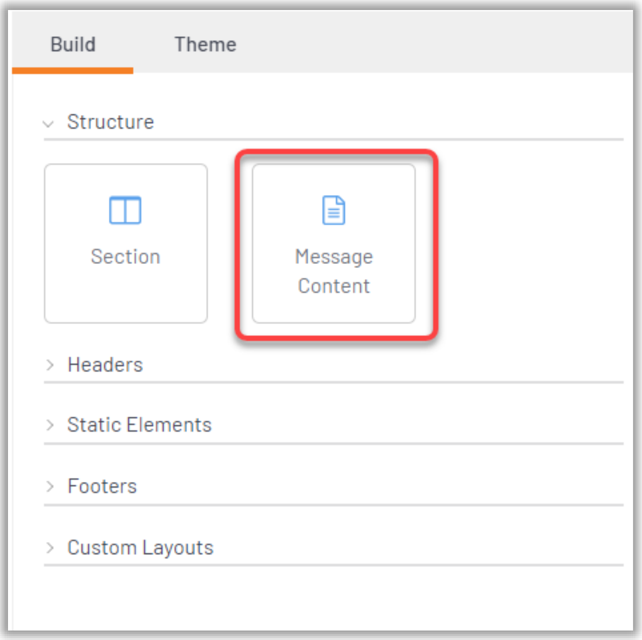
Designing Templates: Template Elements

- Drag & Drop
- Static



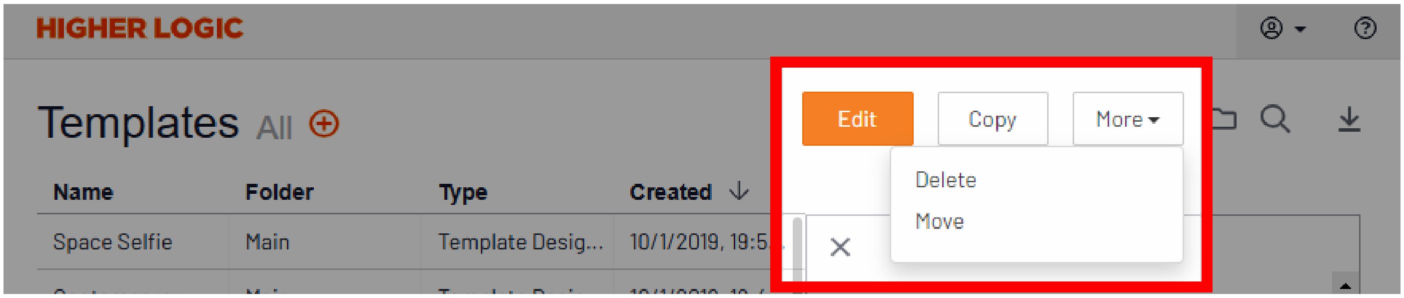
Designing Templates: Message Content Area

- Drag & Drop
- Message Content Layouts
- Enabled not Static



Manage Templates

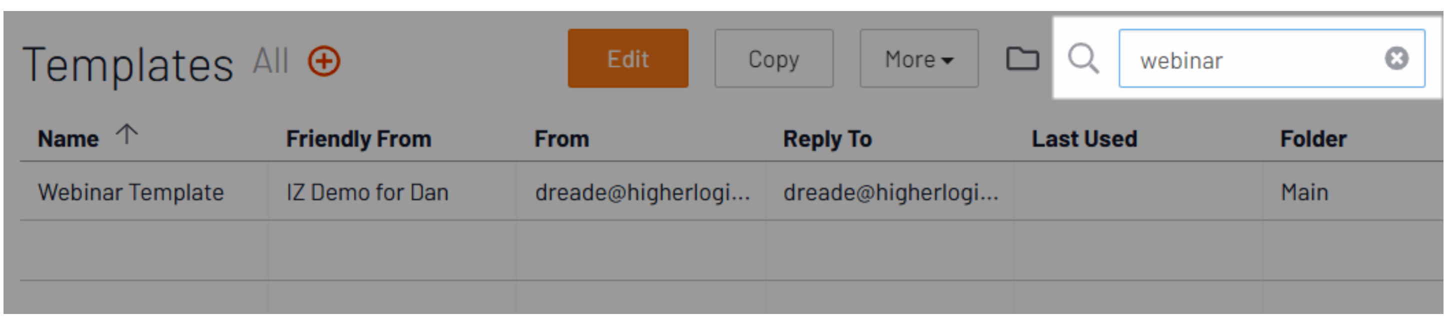
After selecting a template, you can perform several management actions using the buttons above the list.



- Select a template and click **Edit** to make updates in the template's associated editor.
- Select a template and click **Copy** to make a copy of a template with a different name.
- Select a template and click **More > Delete**, and then confirm the deletion in the pop-up.
- Select a template and click **More > Move**, select which folder to move it to, and then click **Move** at the bottom of the dialog.

Search Folders

Click the **magnifying glass** icon to expand a search field, allowing you to find specific messages. The list will automatically update with each typed character and display all records (visible and hidden) that contain a match against all list fields.



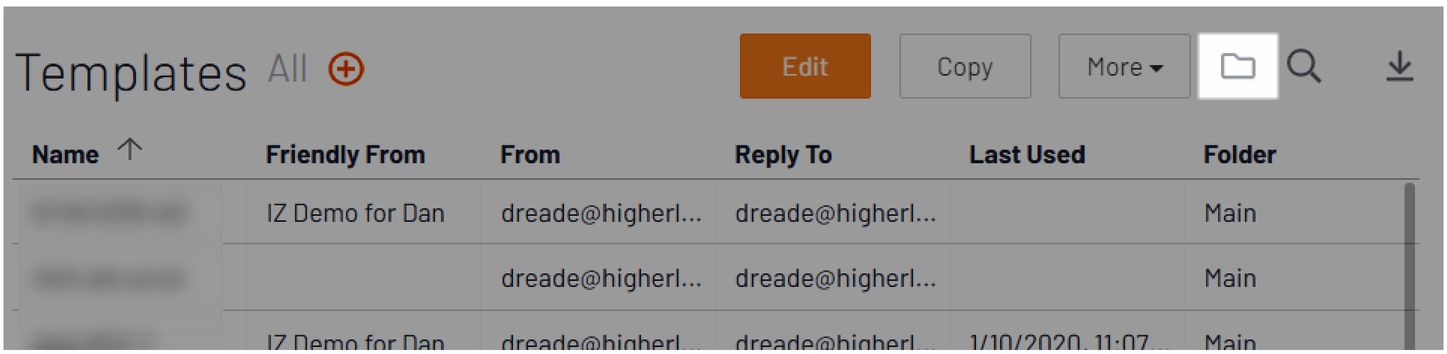
- The search field is **not** case-sensitive: You can type "news" to find "**News**letter" templates.
- Click the **X** to clear the field and restore the original list.

Manage Folders

You can organize your templates by grouping similar or related templates into folders. Because the **Templates** list displays **all** of your templates by default, organizing your templates into folders enables you to isolate a group of templates to more easily work with and manage them.

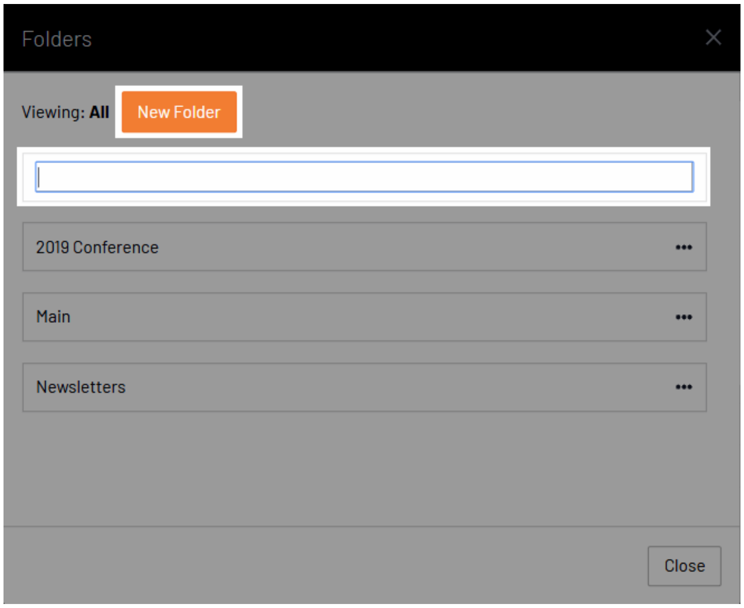
TIP: Create folders and organize your templates from the beginning; otherwise, it will be a more time consuming and difficult task doing so after dozens of templates have been created. When creating your templates, you'll be able to select which folder to store it in.

To manage your folders, click the **folder** icon.

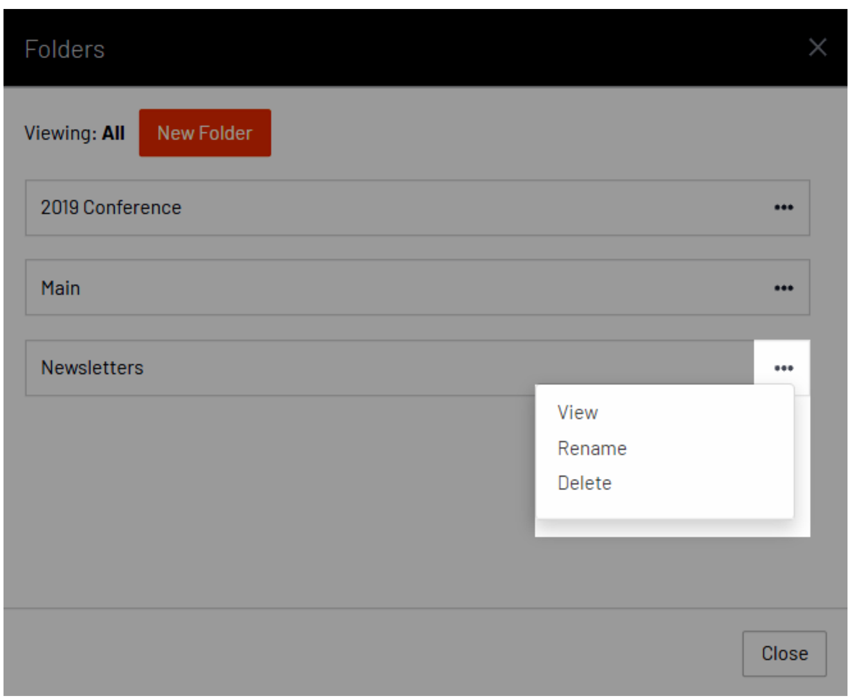


Create Folders

Click **New Folder**, enter a name, and press Enter to add a folder. It will now be selectable during template creation.



Click a folder's **ellipsis** icon to access the following options:

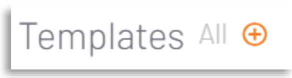


View - View the folder on its own list page with the templates that it contains.

Exercise: Create a Custom Template

Higher Logic Academy

1. Navigate to **Messages> Templates,** click on the **+** button**.**



2. Select **Blank Canvas**
3. Click on **THEME**
    a. Click on the **Element dropdown** and select **Background**
        i. Update body background to HEX #EDEDED
    b. Click on the **Element dropdown** and select **Text**
        i. Update Header 1
            1. Color: HEX #F58026
            2. Size: 28px
        ii. Update Header 2
            1. Color: HEX #9A9B9C
            2. Size: 25px
        iii. Update Header 3
            1. Color: HEX #00B2A9
            2. Size: 20px
        iv. Update Subheading 1
            1. Color: HEX #747678
            2. Size: 18 px
        v. Update Subheading 2
            1. Color: HEX #0066A1
            2. Size: 15px
        vi. Update Standard Text 1
            1. Color: HEX #9A9B9C
            2. Size: 13px
    c. Click on the **Element dropdown** and select **Hyperlink**
        i. Update default color to HEX #F58026
    d. Click on the **Element dropdown** and select **Button**
        i. Update default background color to HEX #3C8A2E
4. Building a Template
    a. Drag 5 Sections onto the canvas – stack them one on top of the other – don't "nest" them
    b. Click on **Section 1**
        i. Click the **style tab** and select the banner property, Click **Close**
        ii. Drag and drop the full width banner default header into Section 1
        iii. Click the image and select **Choose another image**. Asset Manager loads. Select an image from the HL Academy Folder or upload your own image.
    c. Click on **Section 2**
        i. Click the **style tab** and add 10px of padding

Exercise Create a Template (Continued)

    d. Click on **Section 3**

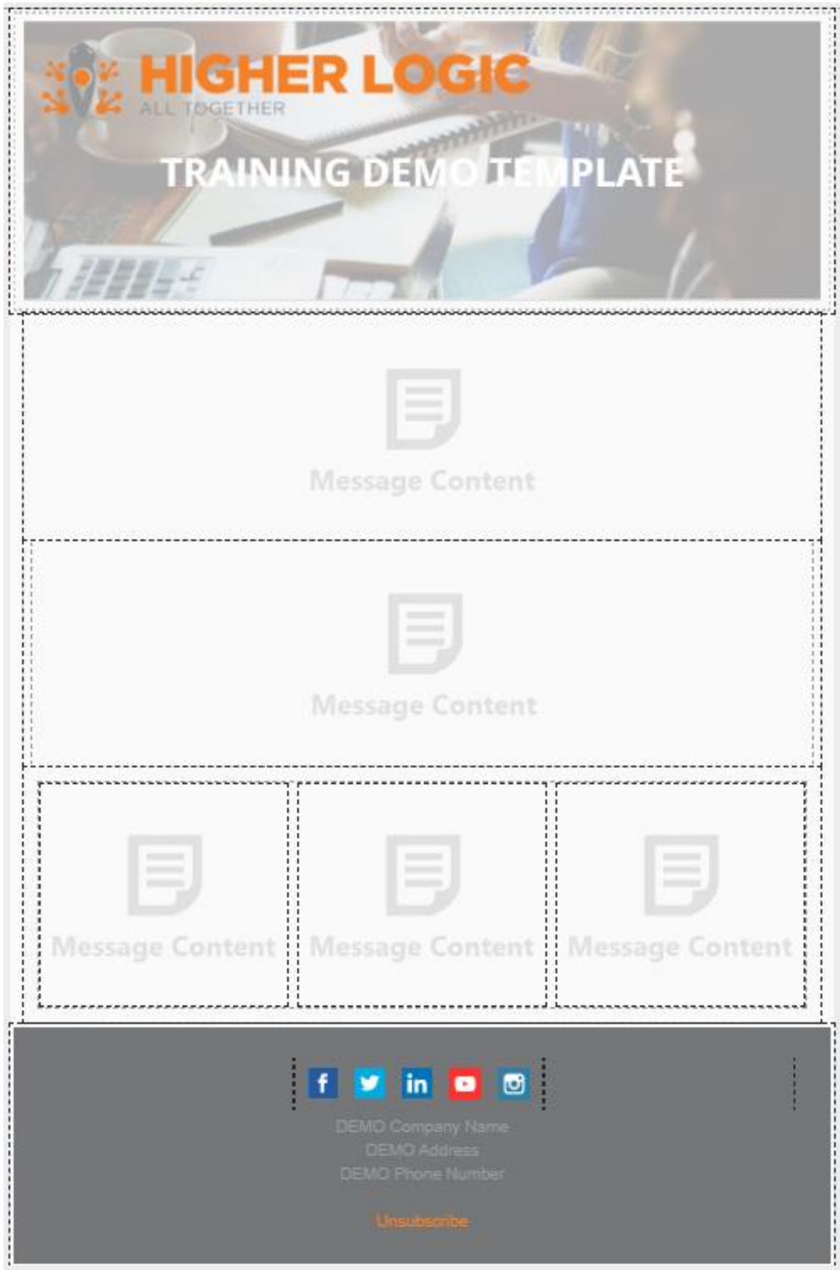
i. Click the **style tab** and add 10px of padding

e. Click on **Section 4**
   i. Click on the **style tab** and add 10px of padding
f. Click on **Section 5**
   i. Click the **style tab** and select the banner property
   ii. Update the background color (override the default) to HEX #747678
   iii. Click **Close**
   iv. Drag and drop the Centered Contact with Social Icons Default Footer into Section 5
      1. *Optional* Edit social icons
         a. Change image
         b. Add hyperlink
      2. Click the **Unsubscribe Link** in the footer
         a. Select unsubscribe text
         b. Hyperlink > Unsubscribe Hyperlink > Landing Page > Default Unsubscribe Form
         c. Uncheck 'use template color'
         d. Change color to HEX #FFFFFF
         e. Click **Insert Hyperlink** and **Close**.

g. NOTE: At this point, the structure of your template is not complete using Template Elements. The header and footer added are static pieces of content. These make up the foundation of the template. We next need to establish **Message Content Areas (MCA)** to have a place for the *dynamic content* provided by a message creator. The MCAs look similar, but they determine where content can be placed during message creation. An MCA can be limited to work with specific layouts. By default, an MCA presents all layouts to the message creator.

h. Section 2
   i. Drag and drop a message content area into Section 2
   ii. Change maximum number of stories to 1
   iii. Select 'Text with Headline' under Message Content
   iv. Click **Close**
i. Section 3
   i. Drag and drop a message content area into Section 3
   ii. Do not change any properties, do not enable any layouts.
      1. Not selecting specific layouts will allow your message creator to access all available layouts and decide what they would like to use
   iii. Click **Close**
j. Section 4
   i. Drag and drop a message content area into Section 4
   ii. Change the max # of columns to 3
   iii. Enable **text**, **text with headline** and **image**
   iv. Click **Close**
k. Click on the **Options tab**
   i. Template Name: Sample Training Template [initials]
      1. Example: Sample Training Template JKC
   ii. Folder: Higher_Logic_Academy
l. Click on the **Review and Activate tab**
   i. Activate template

Completed Exercise: Template



Lesson 2: Summary

In this lesson, you learned:

- ✓ What templates are and options for configuring them
- ✓ How to update a templates theme
- ✓ How to use message content to allow the addition of unique content when using a template in a message
- ✓ How activate a template so it is available account wide

Lesson 3: Messages

Lesson Description

Using the Message designer, in this lesson, learn how to design messages using either a pre-made template or an organization-specific template that is already in use. Take away best practices for reviewing and testing messages internally, virtual inbox testing, and testing dynamic content including personalization. Finally, learn how to formally send or schedule messages to groups.

Lesson Objectives

After completing this lesson, you will be able to:

- Add content to a message using the message designer
- Test a message for spam characteristics, deliverability and launch an internal review
- Send a message to a group

Lesson 3: Messages

How do you design a message in the message designer?
How do you test a message before sending it?
How do you send a message to one or more groups?

Designing Messages and Best Practices

Try one or more of these proven Best Practices

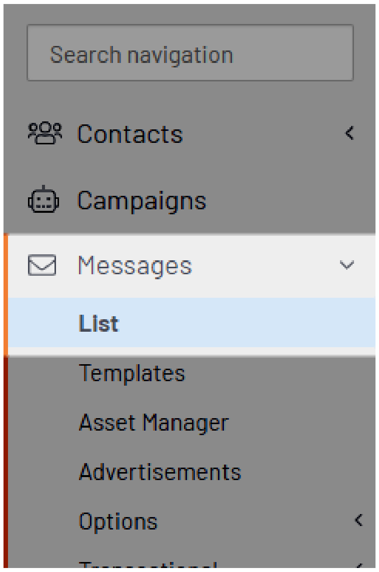
The accompanying slides provide additional detail on each of these topics and can be found in your Higher Logic Academy Live Main Community on the HUG.

- Use personalization in the body and subject of your message
- Leverage the A/B testing feature on subject lines or from fields
- Connect your Communications account to Google Analytics for additional tracking
- Run a virtual inbox test to see what you message will look like on multiple devices
- Utilize the review feature to involve your team on collaborative feedback

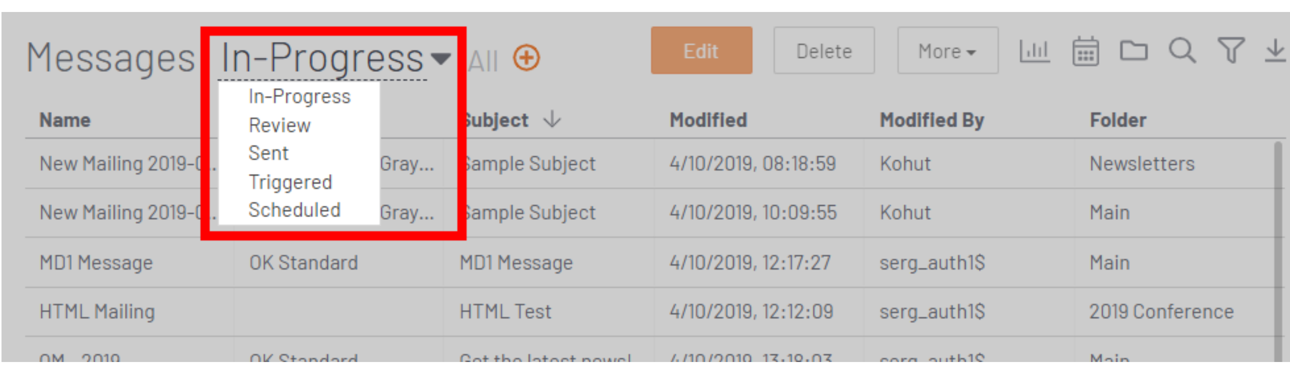
Creating a Message

To access the Messages List:

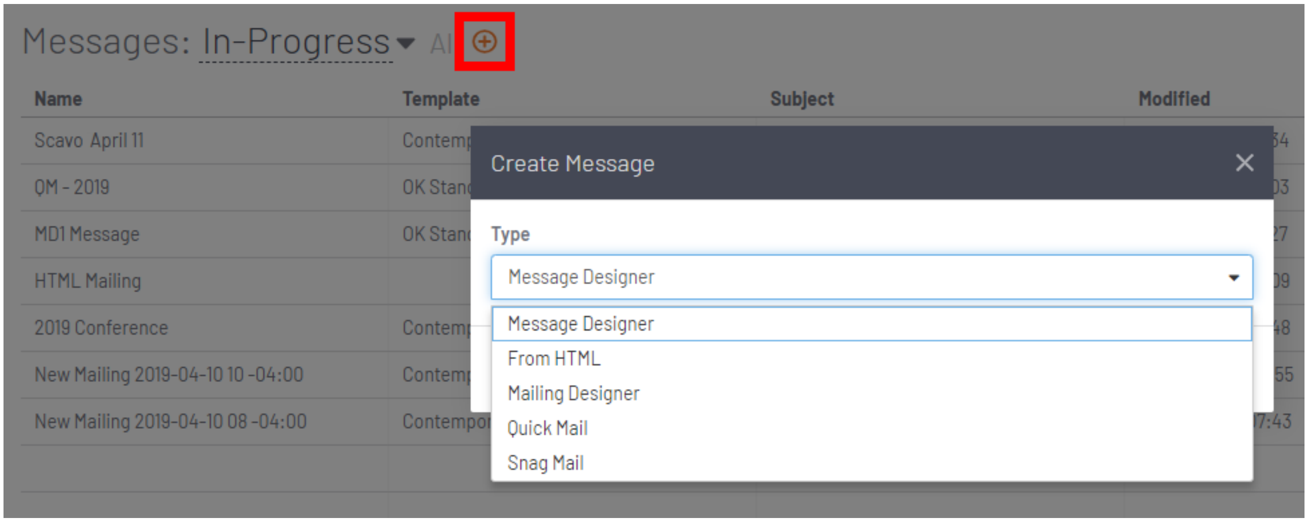
1. Access the Admin interface.
2. Navigate to **Messages > List**.



Once you've accessed the **Messages** menu: the page includes five views to make it easy to filter and manage messages based on their status: **In-Progress** (default), **Review**, **Sent**, **Triggered**, and **Scheduled**. To access these views, click the down arrow to the right of the page title and select the desired status.



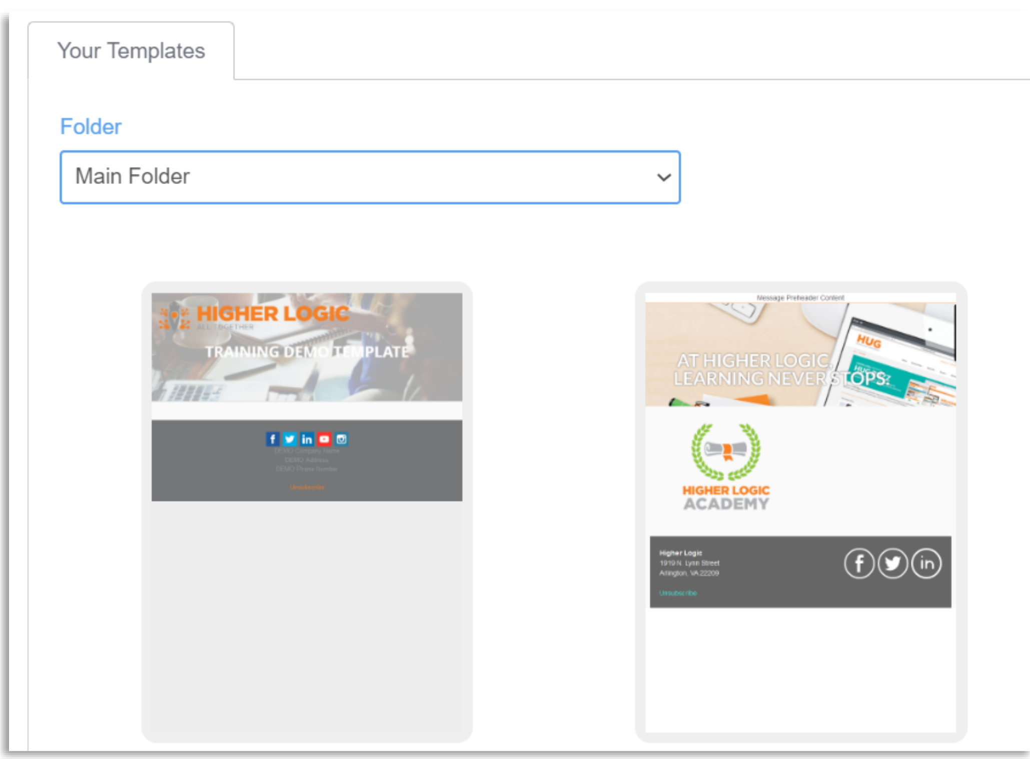
To begin the creation process, click the **plus sign** to the right of the page title. Select **Message Designer**.



Select a Template

Next, you'll be promoted to select a template by clicking on the preview. Browse through the dropdown folder to find templates organized within those folders.

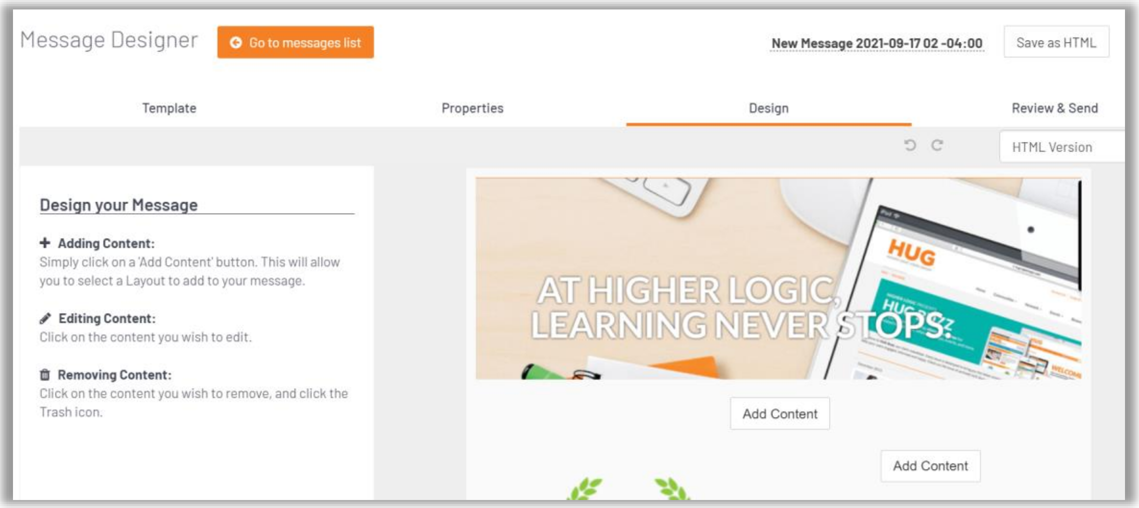
Remember: a template will not be available in this area, unless it's been activated.



The Message Designer

After selecting a template, you'll be brought to the Message Designer.

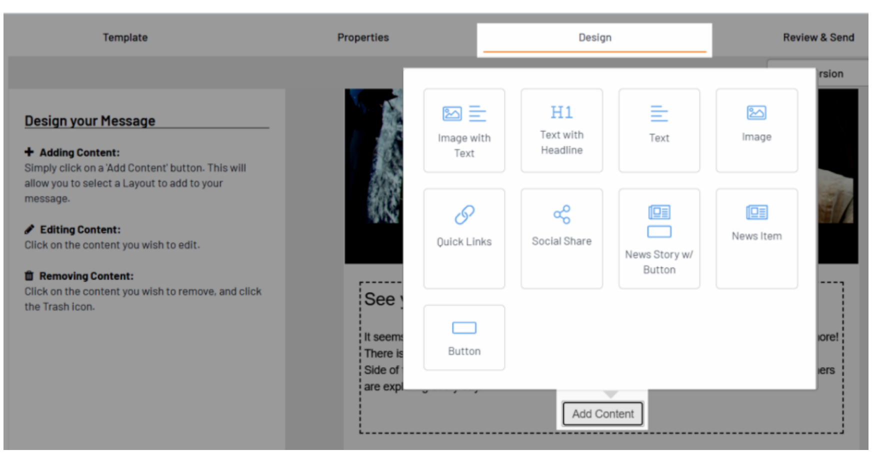
Let's learn about the Message Designer's three main areas: navigation, canvas, and content.



1. **Navigation Bar** - Across the top are the four primary tabs you'll use to design and configure your messages.
2. **Canvas** - In the middle is the canvas, which is where you'll add and manage message content.
3. **Content Properties** - After adding or selecting existing content, a panel appears on the left where you can configure its properties. The options vary depending on the content type (e.g., selecting text provides typical formatting options while selecting images provides image-formatting properties).

Design Tab

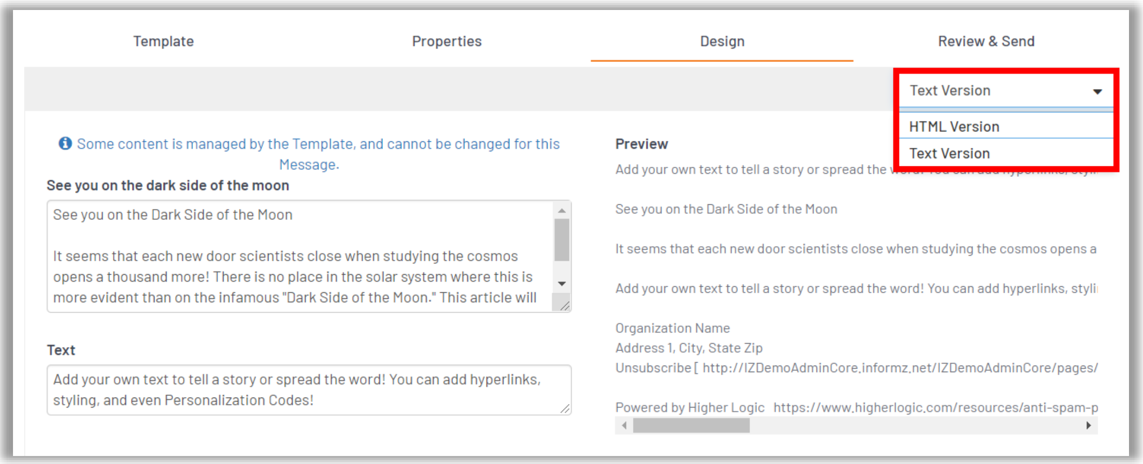
The **Design** tab is where you build your messages, of which **Stories** are the heart and soul. In Message Designer, you add stories to **Message Content Areas**, which are indicated by the **Add Content** button. These layouts are defined in your message's template, and are set up with all the settings you'll need to tell your organization's story. To start adding content, click one of the available **Add Content** buttons. The available story types appear in a menu next to the Message Content Area.



NOTE: Editing options may be limited based on the Theme properties in the template.

Text Version

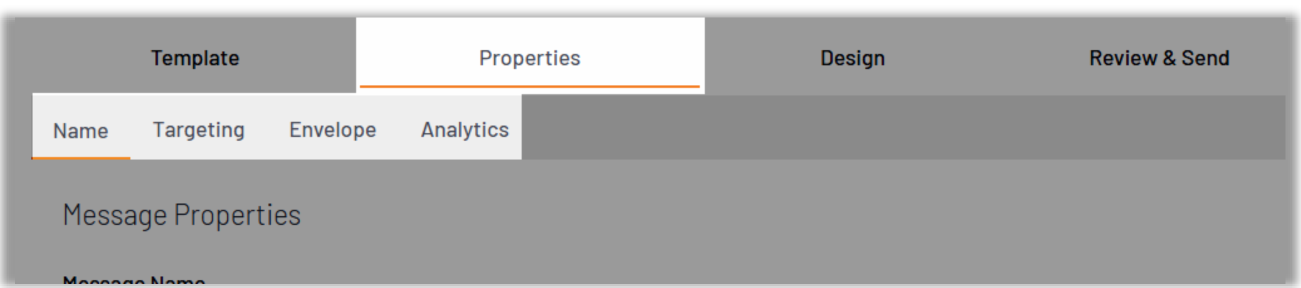
This is the text-only version (all HTML is removed) of your message, which you can see and edit by selecting this view. To access the text-only version, click **TEXT**.



As you're creating a message, the text-only version is automatically created for you alongside the HTML version. Once your message is finalized, the best practice is to verify and reformat this version to fix any possible spacing, bullets, style issues that may not convert properly from the HTML version.

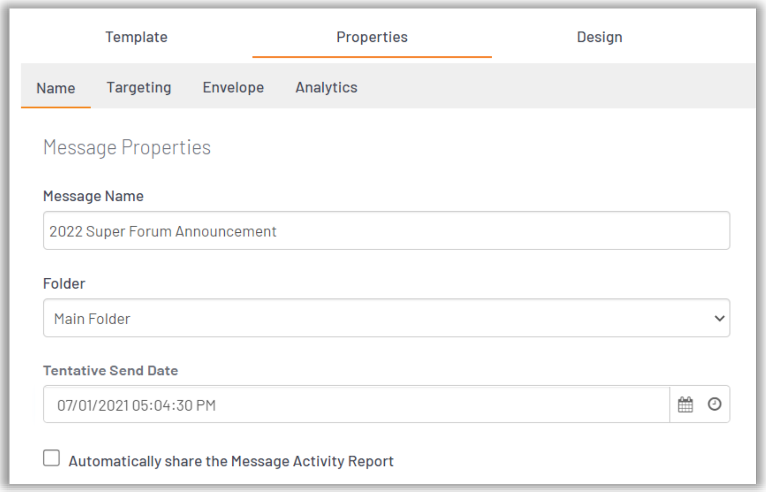
Properties Tab

The **Properties** tab is where you'll set high-level properties for your message. There are four main subsections in the Properties tab:



Message Properties (Name)

There are several options available in the **Message Properties** subsection.



Enter a **Message Name**. This is for your own organizational purpose, so contacts won't see this.

Click the **Folder** menu to store your message in an available folder.

Tentative Send Date

A good way to stay organized is to set a tentative send date for each message. By doing so, everyone on your team will know "who's sending what, when" by simply taking a peek at the MA Professional calendar. If you have concerns about sending too many messages, or if you need to keep oversight over other child accounts using MA Professional, this is an invaluable tool.

Click the **Tentative Send Date** field and select your desired send date and time.

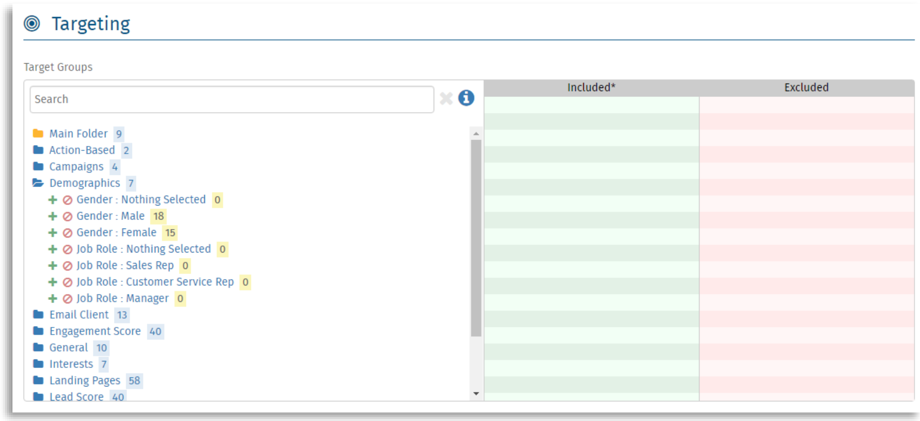
Sharing the Message Activity Report

If you'd like to automatically share the messages Message Activity Report:

1. Check the corresponding box to enable several additional options.
2. Click the **Share Report** menu to select a time to begin sharing the report.
3. In the **Email Addresses** field, enter the email address(es) for the individual(s) you'd like to receive the report (maximum 100 addresses).
4. Enter a **Message** to any report recipients.
5. Check the **Allow access to the Details Tab** box to give any recipients additional information from within the report. If enabled, an email will be sent with login instructions that will allow the recipient to access this one report for 90 days. They will be able to see details down to the contact level, but will **not** be able to make any modifications.

Targeting

Because your contacts are organized in groups, you'll need to set a targeting option for your messages. The Targeting tab displays all target groups in a list/tree structure that is sorted alphabetically.

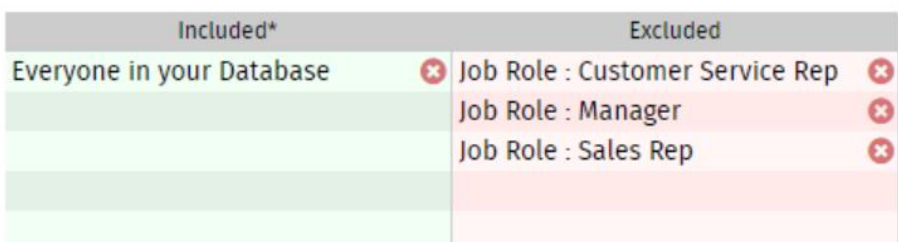


On the page's left side, you'll see a list of folders. The number next to each folder shows the total number of target groups within that folder.

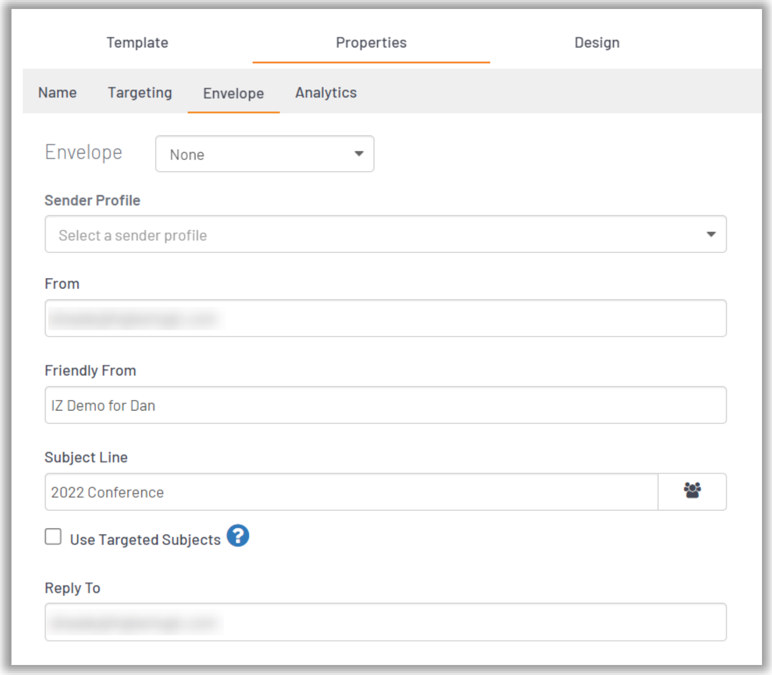
Click your desired folder to view the target groups it contains.

b. Click the Plus sign to add the target group to the Included target groups

c. Click the No sign to add the target group to the Excluded target groups.



Envelope



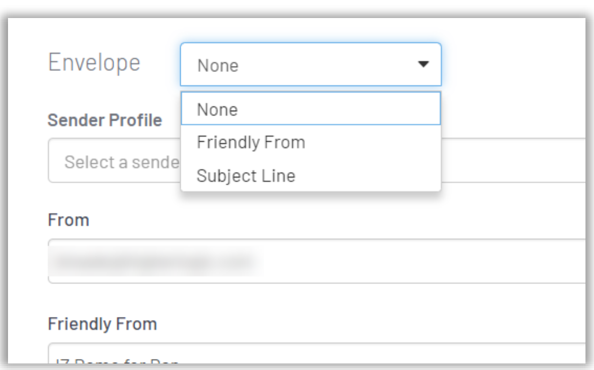
- The **From** email address is displayed next to the "Friendly From." Some bounces and all out-of-office replies go to this address.
- The **Friendly From** is the name that contacts see in the "From" field.

Enter the **Subject Line** for message recipients. Click the **Personalization** icon to the right to add any personalizations to your subject line.

- The **Reply To** email address receives all email replies.

A/B Testing

You can A/B test your Friendly From and Subject Line. When you select either option, the Envelope page expands to allow you to enter an "A" version and a "B" version.



Google Analytics

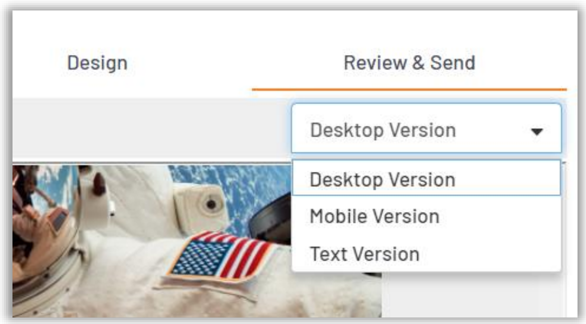
Google Analytics is a popular tool that many organizations use to track their web visitors. You can track hyperlinks in your Communications Professional messages with Google Analytics, helping you to better understand your audience.

Review & Send Tab

The **Review & Send** tab is your final stop before sending your message. Here, you'll have the chance to check the look and feel of your content, test your personalizations, and ultimately send your message to your targeted contacts.

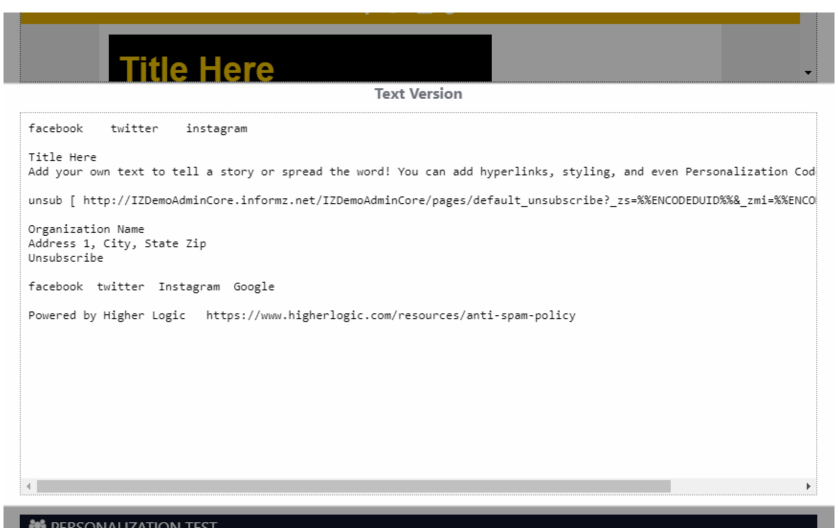
Version Preview

You can review three different versions of your message: **HTML**, **Mobile HTML**, and **Online**. Click the corresponding buttons to view the different versions.



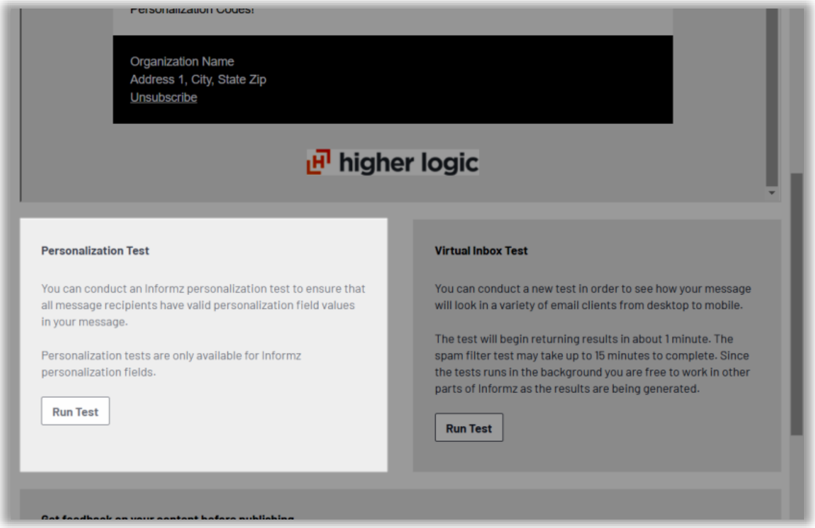
Text Version

You can also preview the text version of your message.



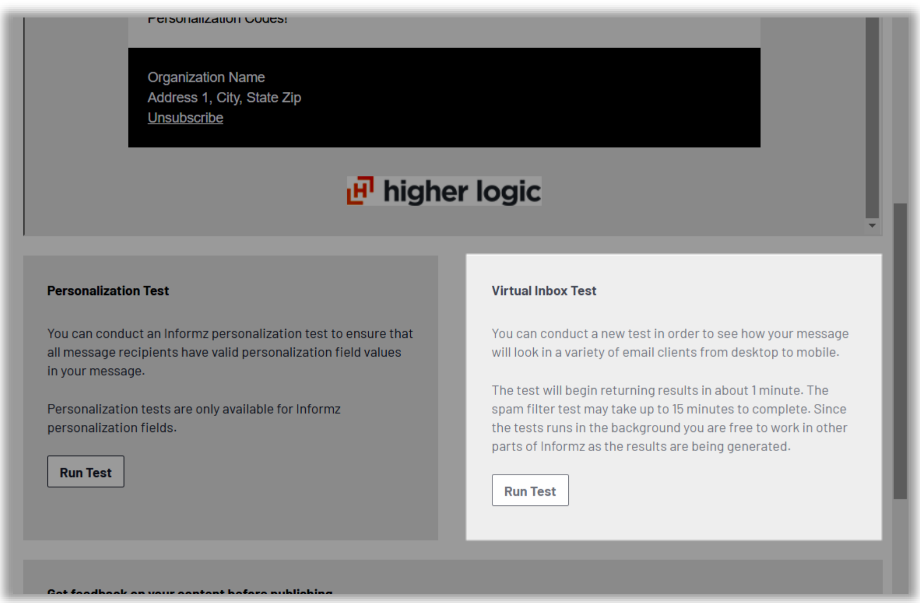
Personalization Test

Run the **Personalization Test** to ensure that all message recipients have valid personalization field values in your message.



Virtual Inbox Test

Run the **Virtual Inbox Test** to see how your message will look in a variety of email clients from desktop to mobile.



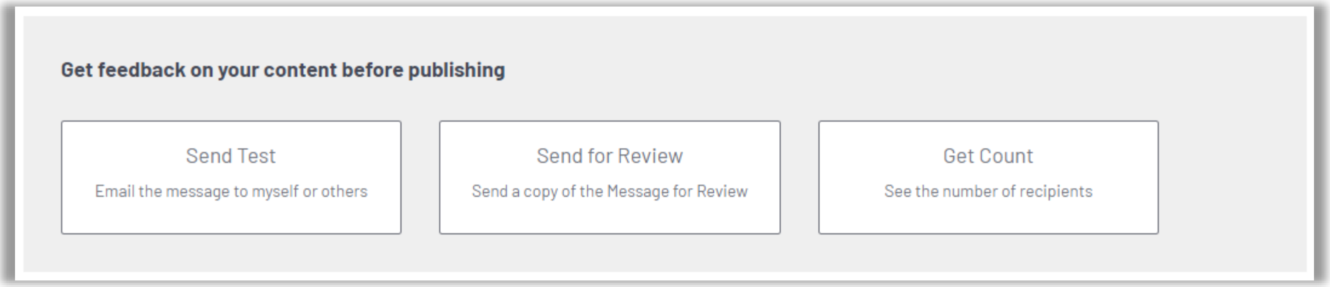
Get Feedback

The **Get Feedback** subsection allows you to gather feedback from your colleagues before you send your message to your contacts.

Three feedback options are available:

Send Test

Send Test enables you to send your message to yourself and/or specific individuals before it goes to your contacts.

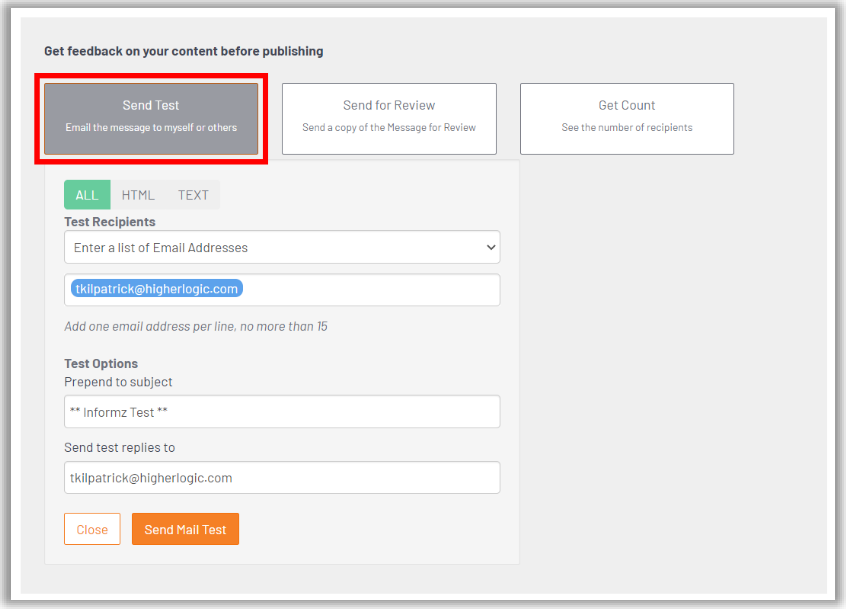


1. Click the **Test Recipients** menu to select a test group **or** a list of email addresses for your test.
2. Enter a message to add to your subject line in the **Prepend to Subject** field. Additionally, enter a recipient email address for all test replies.

When ready, click Send Mail Test.

Send for Review

The **Send for Review** option lets you use the Message Reviewer to gather feedback.



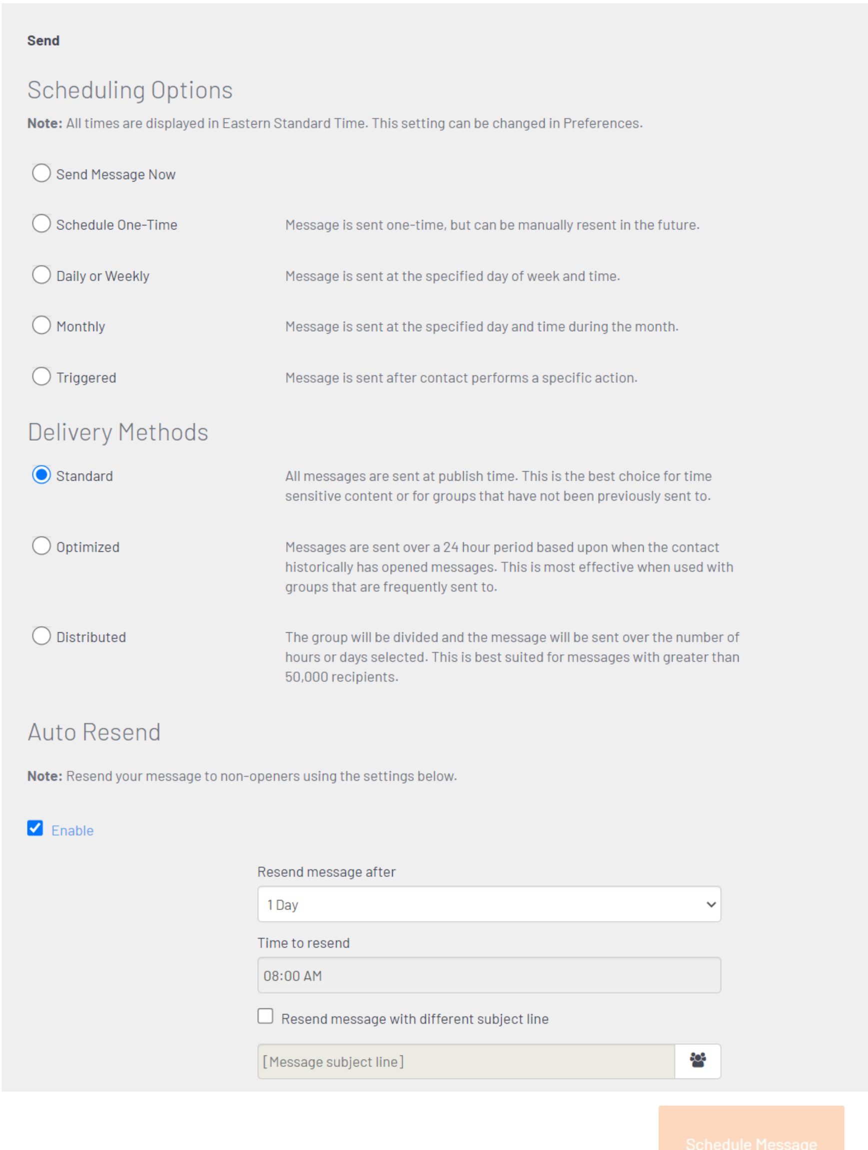
1. Click the first menu to select a test group or a list of email addresses for your review.
2. Enter a **Due Date** and **Instructions** for your reviewers in the corresponding fields.
3. Check the **Include test message in invitation** box if you'd like to send a test message along with your reviewer invitation.
4. Use the **Email Comments to the Author**, **Send an Email to the Reviewer**, and **Send a Due Date Reminder to Each Reviewer** to fine-tune the properties for your review message.
5. Finally, click **Send for Review** to finish.

Send

The **Send** area at the bottom of the page gives you everything you need to get your message sent and into your contacts' inboxes.

Schedule Options

You have several scheduling options for your message:



- Send Message Now
- Schedule One-Time
- Daily or Weekly
- Monthly

When you select an option, the page expands to let you fine-tune your selection.

Delivery Methods

Additionally, you'll have several different delivery methods:

- Standard
- Optimized
- Distributed

When you've set all your message options, click **Schedule Message** to send.

Auto Resend

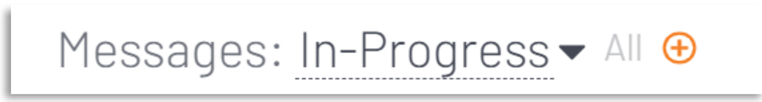
The Auto Resend feature enables you to easily and automatically resend a message to contacts who did not open the original message. Select how many days after the first message you'd like to send to non-openers and the time. As a best practice, use a new subject line for the resend.

Note: You must configure this option while creating a message; it cannot be set up after a message has been sent.

Exercise Create a Message

Navigate & Select Template

1. Navigate to Messages>List> Create (+) >Message Designer>Create



2. Select the Higher_Logic_Academy Template Folder
3. Select the Sample Training Template [your initials]
4. Message Designer loads the selected template
    a. Design Tab
5. Select the first **Add Content** button
    a. Note: Only the text with headline will populate here. In the template, the message content layout was ONLY enabled for text with headline, so that it is the only layout available to use.
    b. Note: In the template, we also limited the message content area to a maximum of 1 story. Once you've added the story, you should observe that the **Add Content** button is no longer available
6. Select **Title Here** text
    a. In the rich text editor, change "Title Here" to:
        i. Welcome [First Name]!
        ii. Type "Welcome"
        iii. Click the **personalization** tool and select **First Name**
    b. Select **Add your own text…** and update it to:
        i. "Your customers and members have high expectations. To engage everyone, you need to create a distinctive and original experience that allows everyone to better function, create and innovate."
7. Select the second **Add Content** button
8. Select **Image with Text** layout
    a. Click the image and choose an image from the HL Academy folder or upload your own image.
    b. Click on **Add your own content…** and update it to:
        i. "Organizations worldwide use Higher Logic to bring like-minded customers and members all together, by giving their community a home where they can interact, share ideas, answer questions, and stay connected. The community is where both your people and your organization will grow and succeed together."
9. Select the second **Add Content** button again
10. Select **Button** layout
    a. Update label to: "**Read More**"
    b. Hyperlink the button to https://www.higherlogic.com/resources/training
    c. Select the **Style tab** and change the default background color to HEX # F58026
11. Select the last **Add Content** button

12. Select **text**

13. Repeat Steps 11-12 three times, observe how the “up to three” columns display
    a. Review the Text Version of the Message
14. Navigate to the **Design tab** and then select **Text**
15. Preview the text version of the message and adjust as needed
    a. Options Tab
16. Navigate to the **Options** tab
    a. Click on **Name tab**
    b. In **Message Name:** type “Sample Training Message [initials]”
        i. Example: Sample Training Message JKC
    c. Click the **Folder dropdown** and select **Higher Logic Academy**
17. Click on **Targeting tab**
    a. Under **email addresses** type in your email address
18. Click on **Envelope tab**
    a. Set envelope properties
        i. Note: the template will determine the default from, friendly from, and reply to address. These properties can be updated on a per message basis and will not impact the default settings.
    b. Click on **Subject Line** and type “Welcome to ABC Association”
19. Click on **Review & Send tab**
20. Review your message
    a. Check the content, toggle to review the desktop, mobile and online preview
21. Scroll down to the **Personalization Test** and click **Run Test**
22. Scroll down to the **Virtual Inbox Test** and click **Run Test**
23. Review Schedule Options and Delivery Methods *(Note: If the message is missing needed items, options in **Send** will be hidden temporarily.)*

Lesson 3: Summary

In this lesson, you learned:

- ✓ How to use the Message Designer
- ✓ Options for targeting and customizing a message
- ✓ Important testing and quality assurance features in the message designer
- ✓ How to send a message to groups

Lesson 4: Reports

Lesson Description

This lesson provides an overview of how to pull and analyze the data for message-related reports. This includes a report for an individual message as well as the message summary report.

Lesson Objectives

After completing this lesson, you will be able to:

- Pull a report for a sent message
- Locate and analyze the Message Summary Report
- Locate key benchmarks for engagement metrics
- Share reports with others

Lesson 4: Reports

What are key message-related reports?
What are the key engagement metrics for a message?
What are the realistic benchmarks for performance?

Message Activity Report

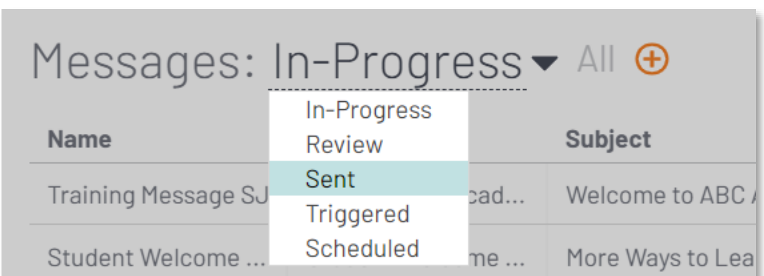
Every time you send a message, its metrics are recorded in a corresponding report: the **Message Activity Report** (**MAR**). Each MAR is specific to one message.

You can review the various metrics of the MAR to see key statistics, and you can share it with colleagues for review and discussion.

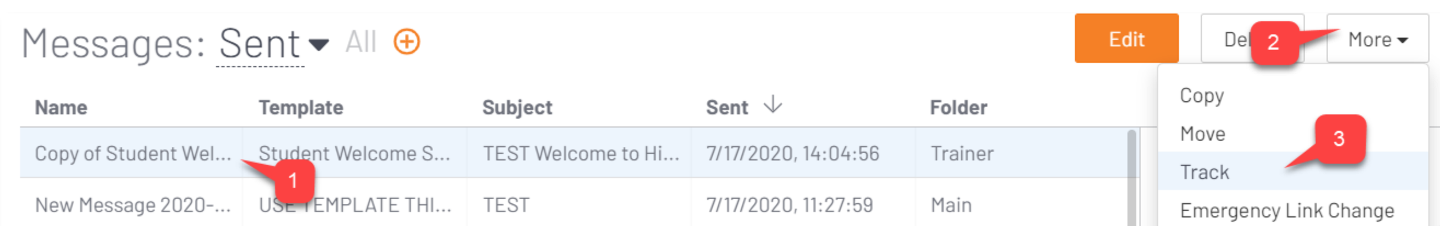
You can access the Message Activity Report:

Navigate to Messages>List

In the top drop down, switch to **Sent** Messages



Select the message you want to pull the activity report for, select **More** and then **Track**



Details Tab Overview

The **Details** tab of the Message Activity Report (MAR) shows subscriber-level and related non-subscriber reports. Here, you'll find categories and subcategories that you can use to filter your report for more specific information. Let's look at some of the features that are common to all MARs.

Key Metrics Tab

If there is only one report to be familiar with in Communications Professional, it's the Message Activity Report (MAR). Every time a message is sent, a corresponding report is created with the metrics for that message. It's best to wait at least 24 hours before reviewing a MAR so that contacts have had a chance to interact with the message.

Every open, click, and forward action is tracked in Communications Professional

Key Metrics Tab Options

1. Hover on the menu icon to the left of a message and select **Report**.
2. Click the **Key Metrics** tab.

Sent - Displays a complete list of all the subscribers that were sent the message. Click the hyperlinked number to display the contacts that make up this number.

Delivered - This is the list of contacts who received the message. A delivery benchmark to strive for is 92%.

Snapshot | Key Metrics | Details | Published Mailing | Options

Export Target Compare Resend

Category	Item	Number	Percent	Note
Delivered				
	Sent	53,456		Total attempted to send
	Delivered	52,899	98.9%	Total delivered
	Unsubscribed	41	0.1%	Recipients no longer wish to receive mailings
	Opt-Outs	11	0%	Recipients no longer wish to receive this type of mailing
	Complaints	5	0%	Recipients clicked the 'Report as Spam' button in their email client.
	Challenges	4	0%	Recipients are using a Challenge/Response system
	HTML Version	52,235	97.7%	Received the HTML version
	Text Version	1221	2.3%	Received the Text version

Unsubscribed - This is the total number of contacts that clicked the unsubscribe link in the message. This action means that they will no longer receive any message from this account. Click the hyperlinked number to display all contacts that are now unsubscribed. View the comments that were provided by these contacts to gain insight into what you should consider changing to have increased engagement.

Complaints - These are typically AOL contacts who have clicked the **Report Spam** button in AOL after receiving your message. These contacts are automatically unsubscribed in Communications Professional. Click this link to display these contacts that complained. The Communications Professional ISP relations team will handle these complaints.

Message Formats

Communications Professional uses “content-type alternative” to create HTML messages. This approach determines if a recipient contact can view the HTML version of the message. If not, a text version is also provided allowing the mail client to switch to display a plain-text version of the message.

Keep in mind that the tracking of a text message is extremely limited. Only HTML versions of messages will provide the full suite of metrics most marketers wish to see.

Category	Item	Number	Percent	Note
Delivered				
	Sent	53,456		Total attempted to send
	Delivered	52,899	98.9%	Total delivered
	Unsubscribed	41	0.1%	Recipients no longer wish to receive mailings
	Opt-Outs	11	0%	Recipients no longer wish to receive this type of mail
	Complaints	5	0%	Recipients clicked the 'Report as Spam' button in the
	Challenges	4	0%	Recipients are using a Challenge/Response system
	HTML Version	52,235	97.7%	Received the HTML version
	Text Version	1221	2.3%	Received the Text version

HTML Version - The total number of HTML messages delivered.

Text Version - The total number of plain-text messages delivered. The contact must have “text version” selected in their profile in order for Communications Professional to flag a message for text by default.

Non-Delivered

There can be many reasons for a message to not be delivered. This section of the MAR delves into these details.

Non-Delivered				
	Soft Bounce	360	0.7%	Temporarily unable to deliver
	Hard Bounce	140	0.2%	Permanently unable to deliver
	Blocked	7	0.1%	Blocked by ISP
	Repeated Bouncer	50	0.1%	Repeatedly unable to deliver

Soft Bounces - A soft bounce is an email that was undeliverable because of any of the following:

- Contact’s email server is down
- Contact’s email server is not accepting email at the time
- Contact's inbox is full

The MA Professional system attempts to redeliver soft bounces for up to 12 hours after the message is published. If some of the soft bounces were delivered properly to the contact’s inbox after the re-send, then the **Soft Bounces** number will be less than the **Soft Bounces Resent** number. After 12 hours, it is up to the user to resend by clicking **Resend to Soft Bounces**. After seven consecutive soft bounces, an email is a considered a hard bounce. By clicking on the **Soft Bounces** link, you can view a list of the individuals that bounced.

Click **Export** to generate and save a Microsoft Excel version.

Hard Bounces - A hard bounce is an email that was undeliverable because of any of the following:

- The domain does not exist
- The domain does not have a mail server
- The email address does not exist on the domain

A hard bounce will always bounce unless the email address is changed. If a contact hard bounces 4 consecutive times, the email will be considered a "repeated bouncer" and Communications Professional will no longer attempt to send to that email address.

Click **Export** to generate and save a Microsoft Excel version.

Blocked - These are contacts who have blocked your emails from reaching their inbox. The email may have been blocked by anti-spam software installed on their ISP's or company's mail server or by anti-spam software installed on the contact's computer. Our ISP relations team will investigate all blocks by contacts try to resolve the issue with the ISP or company.

Repeated Bouncers - A contact becomes a "Repeated Bouncers" when:

- An email address has hard bounced 4 consecutive times.
- An email address has soft bounced 7 consecutive times.

When a contact becomes a repeated bouncer, the MA Professional system will no longer send emails to that contact.

Opens & Clicks

Getting a solid open rate is a great metric to pursue. This section of the MAR provides more details about open rates.

Opens				
	Total Opens	41,156	79.2%	Total number of times mailing opened
	Unique Opens	21,456	41.3%	Recipients who opened the mailing
	Average Opens	1.92		Average number of opens for recipients who opened
Clicks				
	Total Clicks	15,678	38.1%	Total number of times links clicked
	Unique Clicks	13,452	62.7%	Recipients who clicked the mailing

Total Opens - The total times an email was opened and is not a unique number.

Unique Contacts - This is a true measure of the opens. Whether someone opened an email once or five times, it will record that as one open. The open rate percentage benchmark should be at approximately 40%. The open rate does not include contacts who are received the text version of your emails; text versions cannot be tracked. If a recipient views the email in their preview pane, it counts as an open.

Unique Opens - Displays email address and the number of times a recipient (of the HTML version) opened the email. The open percentage is calculated by dividing the unique open by the amount of HTML email delivered. Click **Export** to generate and save a Microsoft Excel version.

Average Opens - This number is based on unique contacts. If this number is high (above 2), then you can assume that recipients are clicking on the message to open it, as opposed to viewing it in the preview pane.

Total Clicks - This number represents the total times a link was clicked and is not a unique number. For example, if one recipient clicks a link five times, all five of those clicks are included in this count.

Unique Clicks - Displays email address and the number of times they clicked on various links in the email. You can drill down **by individual** to display the links they clicked on and how many times. The click-thru benchmark should be approximately 20%. The click-thru percentage is calculated by dividing the unique contacts who clicked by unique number of contacts who opened. Click **Export** to generate and save a Microsoft Excel version.

Viral: Sharing and Forwarding

This section of the MAR provides insight into whether the message is being shared or forwarded. High percentages here indicate that the content resonated with the contact such that he wanted to let other people know about it.

Viral				
	Total Forwards	1,045	2.5%	Total number of forwards
	Unique Forwards	876	4.1%	Recipients who forwarded the mailing
	Send to Friend Usage	220	1%	Forwards using Send to Friend form
	Social Posts	3076	3.1%	Social Posts

Total Forwards - This figure indicates how many times the email was forwarded (using the **Forward** button on the browser). A forward is counted only if it is made to an IP address other than yours. If a contact forwarded the email more than once, each forward counts towards the total.

Unique Forwards - A true measurement of how many people are using viral marketing, this count is the number of times an email was forwarded, the email address of the forwarder, and a total ratio.

Send to Friend Usage - If you have the Send-a-Friend feature enabled on your template you are able to record the number of times the feature was used, to whom the email was sent, and who sent the email.

Social Posts - This area records such activity when your contacts share your message on their social media site

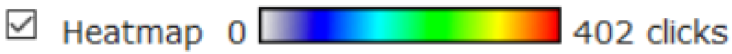
Published Message Tab

When viewing the Message Activity Report, you can view the online version of the published message. Here you can see the entire message along with a **heat map** that shows where contacts have clicked. This gives you a unique perspective on how the message appears to your contacts and how they interact with the different links. Ultimately, the heat map can help you identify the prime real estate for link placement in your message.

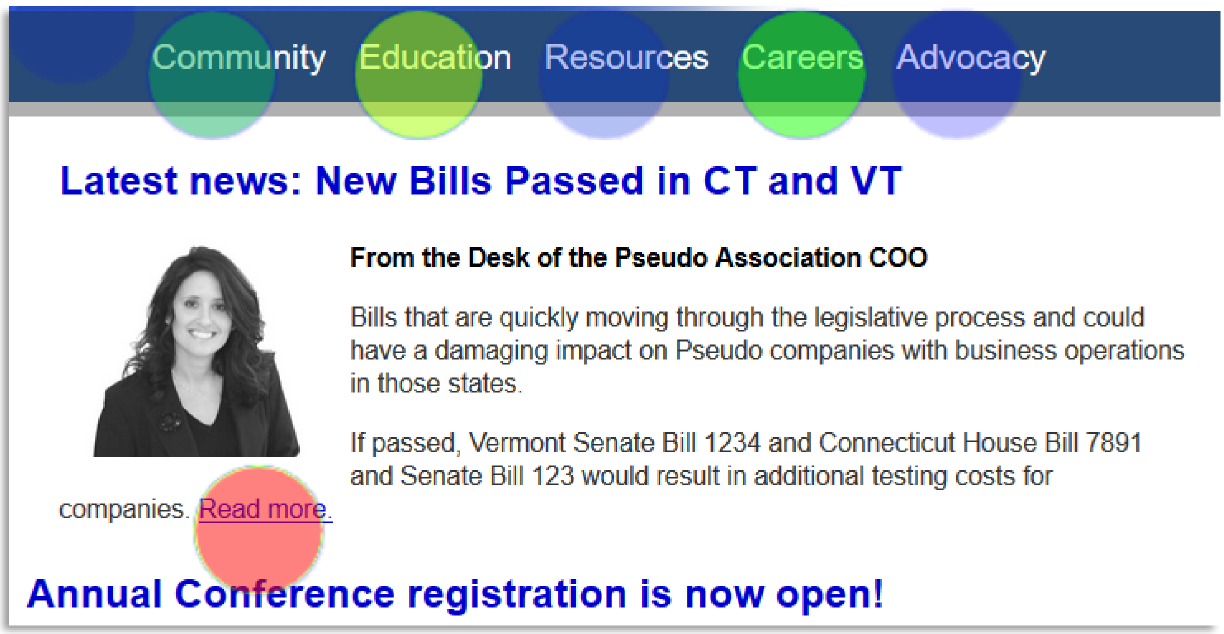
View the Heat Map

Navigate to the **Message Activity Report > Published Message**

A heat map displays over the message. The key to the heat map is in the upper left corner.



The warm colors (red, yellow) indicate more clicks, while the cool colors (blue, green) indicate fewer clicks.



By understanding where in your message your contacts interact, you can improve your layout and content. These insights are extremely valuable when you move forward, revise, and refine your messages.

Message Summary Report Overview

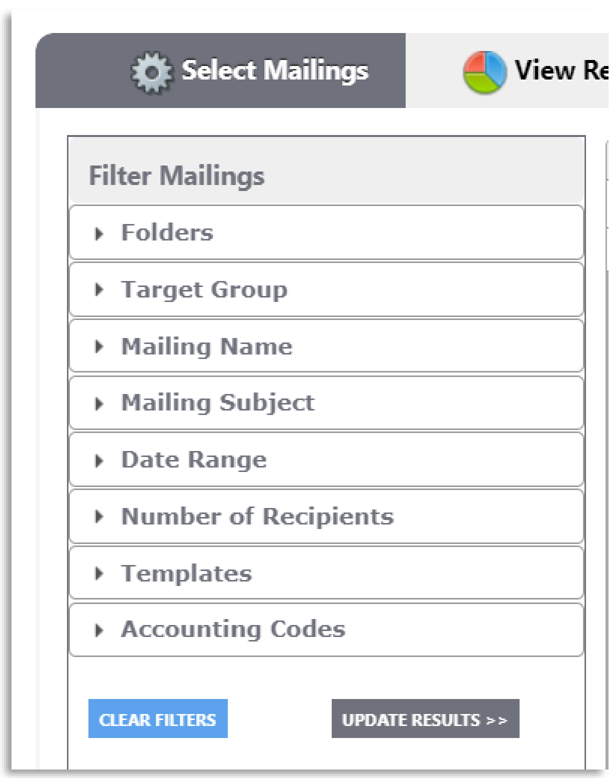
As you employ your email marketing strategies, you'll inevitably want to understand the high-level metrics from your messages. This is the purpose of the **Message Summary Report** (**MSR**): It's a birds-eye view of all of your messages in one searchable package.

Access the Message Summary Report

Navigate to **Messages > Reports > Message Summary Reports**.

Filters

If you want to narrow your summary report results, use the **Filter Messages** options on the **Select Messages** tab. There are several ways to filter the MSR.



Accounts - Select the parent and/or child accounts to use.

Folders - Select the folder where the messages reside.

Target Group - Narrow your results to messages sent to a target group.

Message Name - Narrow your results by message Name.

Message Subject - Narrow your results by message Subject.

Date Range - Select messages in a specified date range.

Number of Recipients - Use the slider to identify the minimum and maximum number of recipients for a message in the results.

Templates - Select one or more templates used to build messages.

Accounting Codes - Select one or more accounting codes associated with a message.

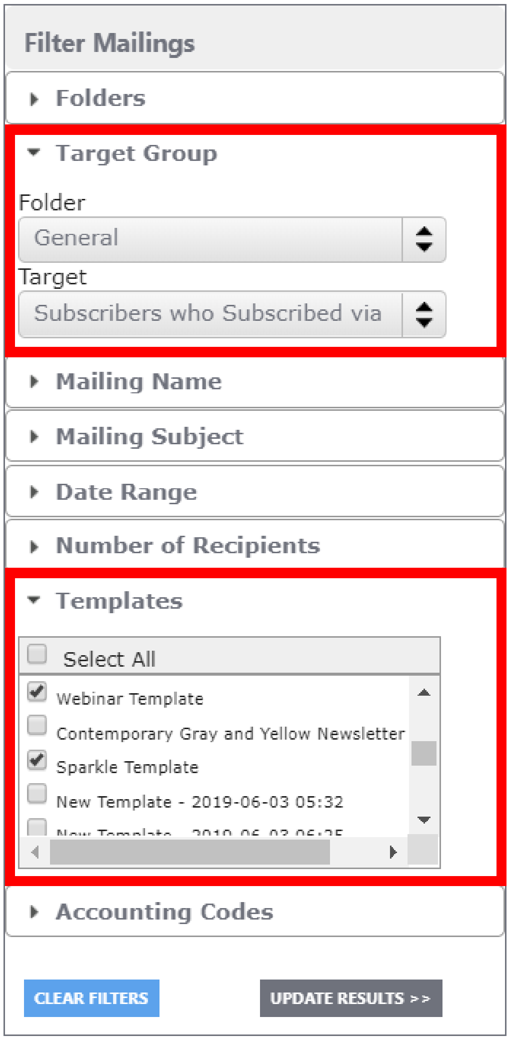
After selecting one or more filters, click **Update Results** to display the associated messages to the right. At this point, you can check the boxes in the left column next to each message to exclude messages from the results, if needed.

With the messages you want to view metrics for defined, click the **View Reports** tab at the top.


Mailing Summary Reports
List
Reports
Calendar
Select Mailings
View Reports
SHARE
Reports
Overview
Snapshot
Key Metrics
Link Summary
Link Name Summary
Opens, Clicks and Recipients
View Trends Over Time
Answer Marketing Questions
Compare Mailing Results
Examine Tabular Results
Analyze Subscribers
Advertisements
Domains
60 Messages Sent
White dashed line is the benchmark.
Benchmarking Details
Delivered 10
16.7%
of sent
Opened 5
50%
of delivered
Clicked 1
20%
of opened
Unsubs 0
0%
of delivered
Opens & Bounces
Opened 8.3%
Not Opened 8.3%
Bounced 83.3%
Clicks
Clicked 20.0%
Not Clicked 80.0%
Mobile Opens
Mobile 20.0%
Not Mobile 80.0%
Total Reach
Forwards 0.0%
Shares 0.0%
Post Views 0.0%
Opens 100.0%

Use the MSR to compare your messages

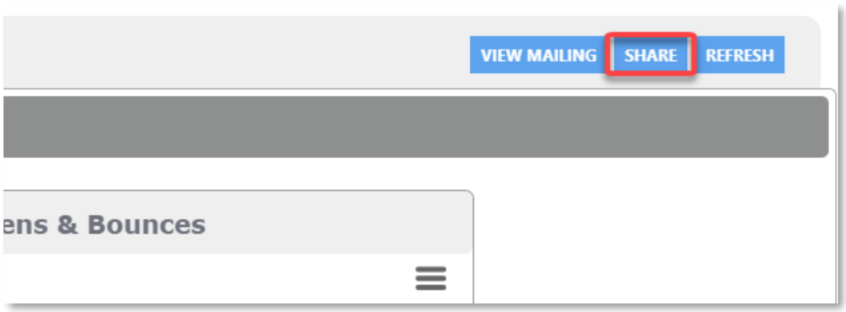
The MSR is especially useful when you want to see the net results of several messages with a common feature. For example, if you have been sending two messages — each with a unique template — to the same target group, you can use the various criteria to get results that will help you to better understand how contacts interacted with one message versus the other based on the message's template.



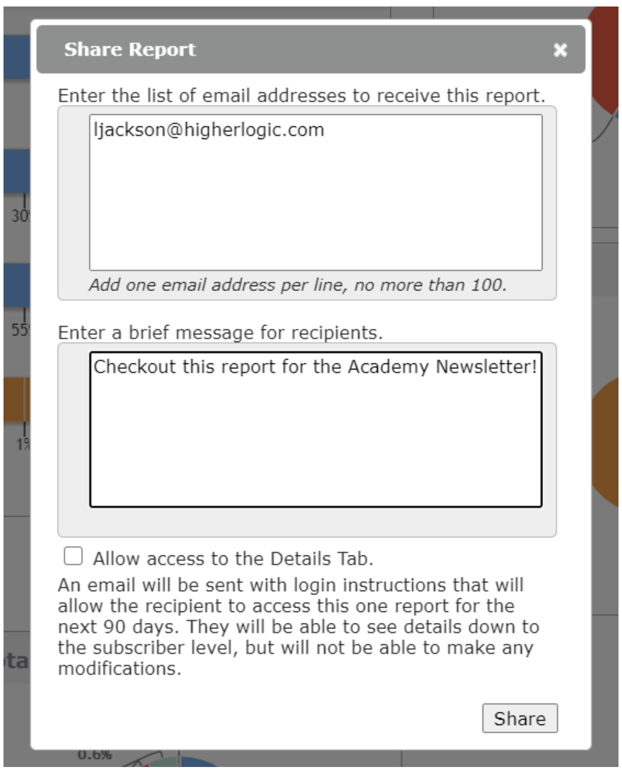
Additionally, using the various reports on the **View Reports** tab, you can dive deeper into the information and get a granular feel for how each metric affects your messages.

Sharing Reports

To share any report in your Communications Professional account, navigate to the top right of the report and select **Share**.



Once you click share, you'll be promoted to input email address to share the report with and given the ability to include a customized memo.



Recipients of the report do not need a Communications Professional account to access the report, rather they will be given instructions to login. They will be able to see the one report, only. If you select **Allow access to the Details Tab** the person who received the report will be able to see specifics such as who has opened, click, or unsubscribed from a message (by email address). If left unselected, the recipient of the report will only see the snapshot and no specific contact details.

Lesson 4: Summary

In this lesson, you learned:

- ✓ What reports are key for tracking message activity
- ✓ How to filter and search through reports
- ✓ Where to locate benchmarking information and compare
- ✓ How to easily share reports internally and externally

Lesson 5: Landing Pages

Lesson Description

Overview of the landing pages tool including using the designer, page configuration and hosting options. Learn how to create custom, branded unsubscribe forms and other types of landing pages.

Lesson Objectives

After completing this lesson, you will be able to:

- Utilize the landing page designer
- Understand the different landing page formats
- Leverage the different hosting options for landing pages
- Update and customize your unsubscribe landing page
- Landing Page Best Practices

Lesson 5: Landing Pages

What types of landing pages exist?
How can an unsubscribe page be updated?
How can I create a landing page?

Landing Page Types

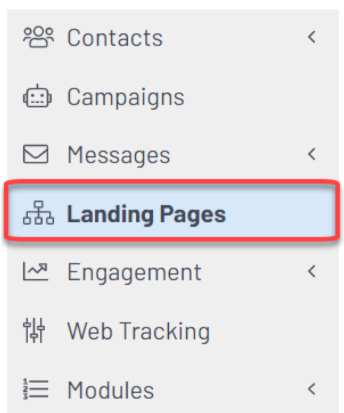
Landing Pages provide way to create custom input forms, unsubscribe forms, and content landing pages in Communications Professional. Through our design-friendly editor, users can easily customize the look and style of these pages.

You can create three types of Landing Pages:

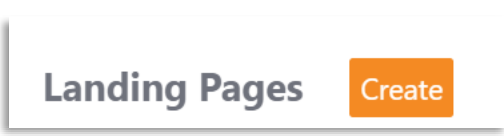
- **Form Pages** - A page that can collect and update new or existing contact data.
- **Content Only Pages** - A static page that contains text, images, and link content.
- **Unsubscribe Forms** - A page that allows users to unsubscribe from messages.

Choose a Landing Page Template

1. Navigate to **Landing Pages**.

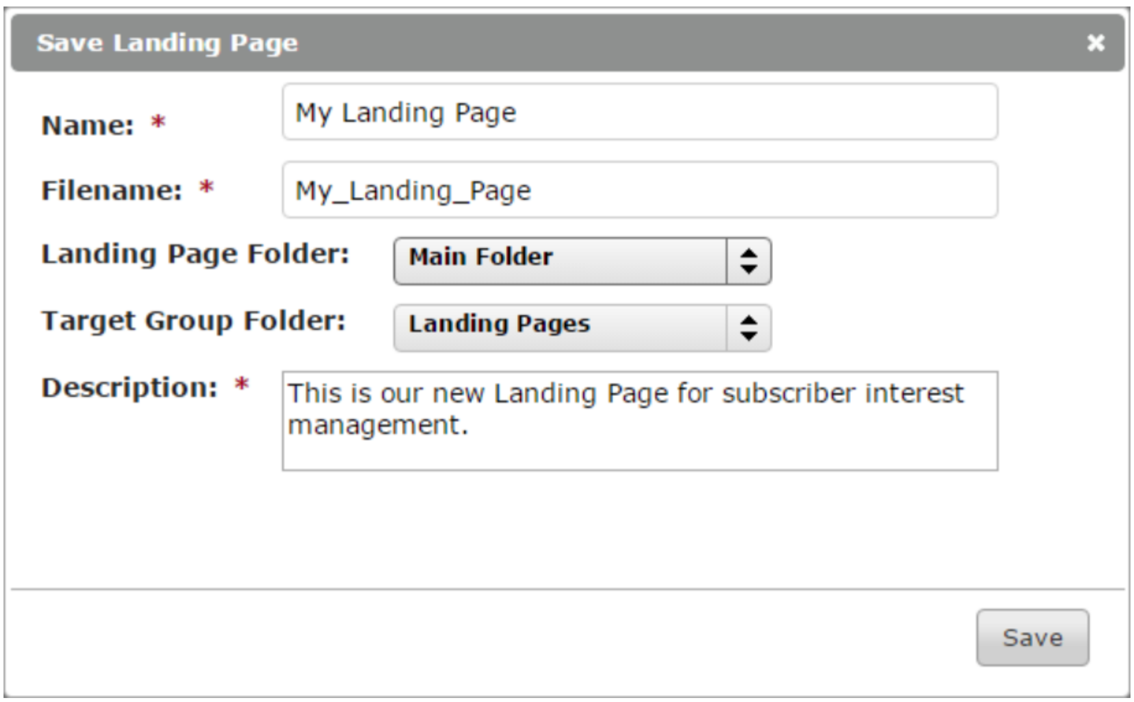


2. Click **Create**.



The **Landing Page Template Gallery** opens.

3. Click the tab for the type of landing page form you want.
4. Use the left and right arrows to navigate among the templates. Click a template to use as the basis for your landing page form.
5. Click **Save**. You will be prompted for the following information:
    - **Name** - The landing page name for your account.
    - **Filename** - An HTML page name (invalid characters will be replaced with underscores).
        - Landing Page Folder
        - Target Group Folder (for automatically generated target groups)
        - Description



Access the Style Menu

Once in the landing page editor, Click the **STYLE** tab on the right. Here you can manage the pages background image or color, the layout area properties, test and headers, input fields and checkboxes, update the button properties and adjust the validation message for required input fields (ex/first name is required).

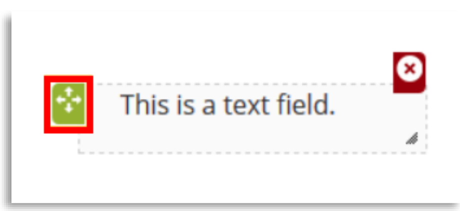
Design Tab

Let's learn about a few Design tab basics.

Dragging and Sizing

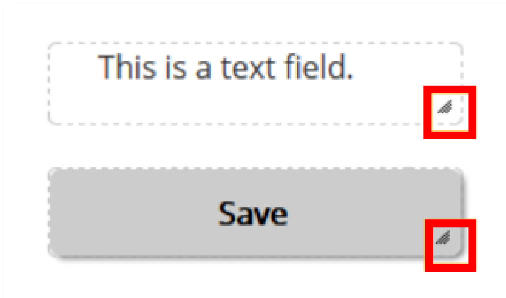
The Landing Page Designer is a true drag-and-drop editor where you can freely move form elements as you need to. Let's take a look at the options available for the different elements.

Hover over an element to reveal the Green Directional Arrows icon. Click the icon and drag the element to the desired location.



Additionally, hovering will reveal the Red X icon. Click this icon to the delete the element.

To resize the width and height of any layout elements, click and drag the resizing handles.



NOTE: Some elements will have a Blue Gear icon. Click this to open a properties pop-up where you can further edit that element.

To move items, simply use any of the green handles for one of the elements. If you've selected too many items, use a subsequent Ctrl + Click to deselect the unwanted item(s).

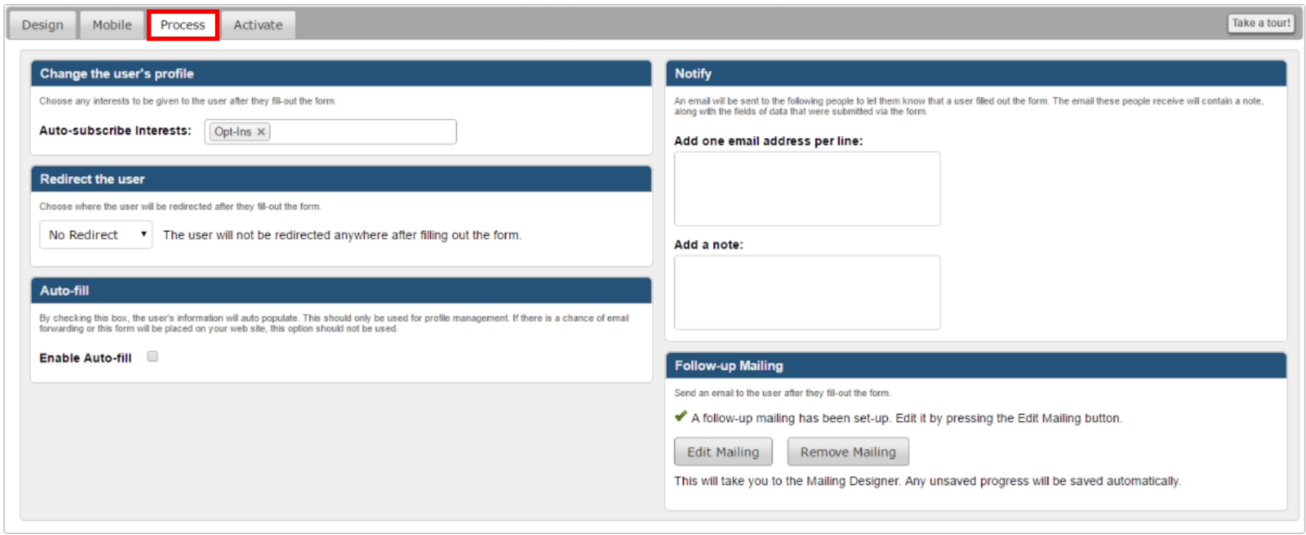
Mobile Tab

The **Mobile** tab allows you to optimize your layout for a mobile device. We live in a mobile world, and Communications Professional's landing pages are no different. By optimizing the look and feel of your landing page for cell phones, tablets, etc., you'll ensure that you have the mobility needed to navigate an ever-changing information ecosystem.

You will not add any elements to this design–they are all inherited from the **Design** tab. However, you can freely re-size the existing elements inside the layout area and change their position. Additionally, you can work with the Style Flyout Menu (any styles you change are shared between the **Design** and **Mobile** tabs).

Process Tab

The **Process** tab allows you to configure what happens after a subscriber completes a landing page form.



This tab contains the following options:

- **Change the user's profile** - Click in the **Auto-subscribe Interests** field to add any automatic interests to assign after subscribers complete the form.
- **Redirect the user** - Click the drop-down to redirect subscribers to another landing page, a web page, or an uploaded PDF file (PDFs are uploaded in this tab by selecting **File**).
- **Auto-fill** - Allows the form to auto-fill information (this is disabled by default). This feature is designed for profile management, and if subscribers access the form via a message (when this option is checked), their information auto-fills.

Landing Pages Best Practices

You want your **Communications Professional Landing Pages** to be as effective as possible in gathering subscriber information so that you can make the most of the data that you collect. A well-designed landing page helps to ensure two things: that your subscribers understand what information you're seeking and that you collect as much accurate and useful information as possible.

Consider the following best practices and recommendations when creating a landing page.

- Give the landing page a subscriber-facing name that will really articulate its purpose to your subscribers. Be consistent with this naming of future landing pages.
- Make sure that you clearly express what you want from your subscribers in brief sentences and field labels. If you don't, you might not get the information that you want, or you might frustrate your subscribers.
- Clearly state your questions; straightforward "Yes/No" options minimize ambiguity and confusion.
- Don't overwhelm your subscribers with too many options; 6–12 per landing page is a good range. Carefully consider the different types of messages that you send and add your interests accordingly.
- Indicate on the landing page any messages (such as membership news) that subscribers cannot opt out of.
- Consider the benefits of using the **Auto-subscribe Interests** and **Auto-fill** options on the **Landing Page > Process** tab
- Provide a link to your privacy policy to offer transparency regarding how a subscriber's data is being used. This is especially important in light of recent privacy-protection measures with CASL and GDPR.
- You can include an **unsubscribe** option on the landing page form but keep it simple and straightforward so that your subscribers know exactly what they are unsubscribing from. Consider also adding a free-form field for subscribers to indicate why they have unsubscribed.

Exercise: Create an Unsubscribe Landing Page

1. Navigate to **Landing Pages**
2. Select the Higher Logic Academy Template Folder and click the **In Progress** tab
3. Hover to the left of the **Higher Logic Academy Unsubscribe Form** > select **Copy**
    a. Name: type "[your initials]_Higher Logic Academy Unsubscribe Form"
    b. Filename: type "[your initials]_hl_unsubscribe"
    c. Click **Copy**
4. Hover to the left of the copy of the unsubscribe form and select **Edit**
5. Click the current logo "Your Logo Here" and then press the **Delete** key (Red 'X")
6. Click the **ITEMS** tab to the right of your screen
7. Select **Image > HL Academy Folder >** select **hl_logo_100.png**
8. Click the **STYLE** tab on the right of your screen
9. Select **Page Background**
    a. Update Color to 9A9B9C
10. Select **Layout Area**
    a. Update Border color to #1E1E1E
11. Select **Button**
    a. Update Background color to #F58026
12. Click the mobile tab and make any adjustments as needed
13. Click the **Activate** Tab > Test the landing page
14. Navigate back to the Activate Tab > Select Activate Landing Page > Save

Lesson 5: Summary

In this lesson, you learned:

- ✓ How to use the landing page designers
- ✓ Options for creating landing pages
- ✓ Configuration options for hosting a landing page
- ✓ Best Practices for Landing Pages