



How to Create a Marketo Email Send Program

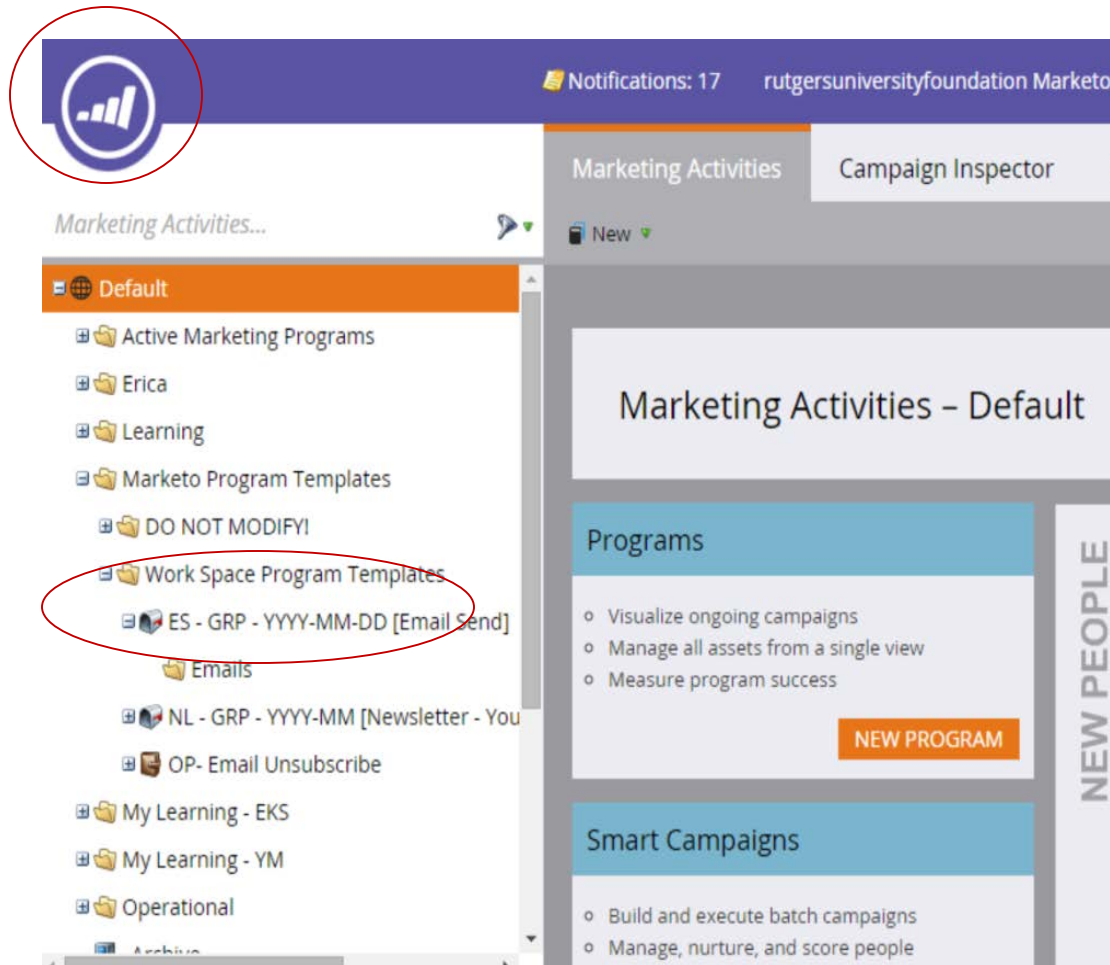
ES – GRP – YYYY-MM-DD [Email Send]

12.17.15

What will this presentation teach you?

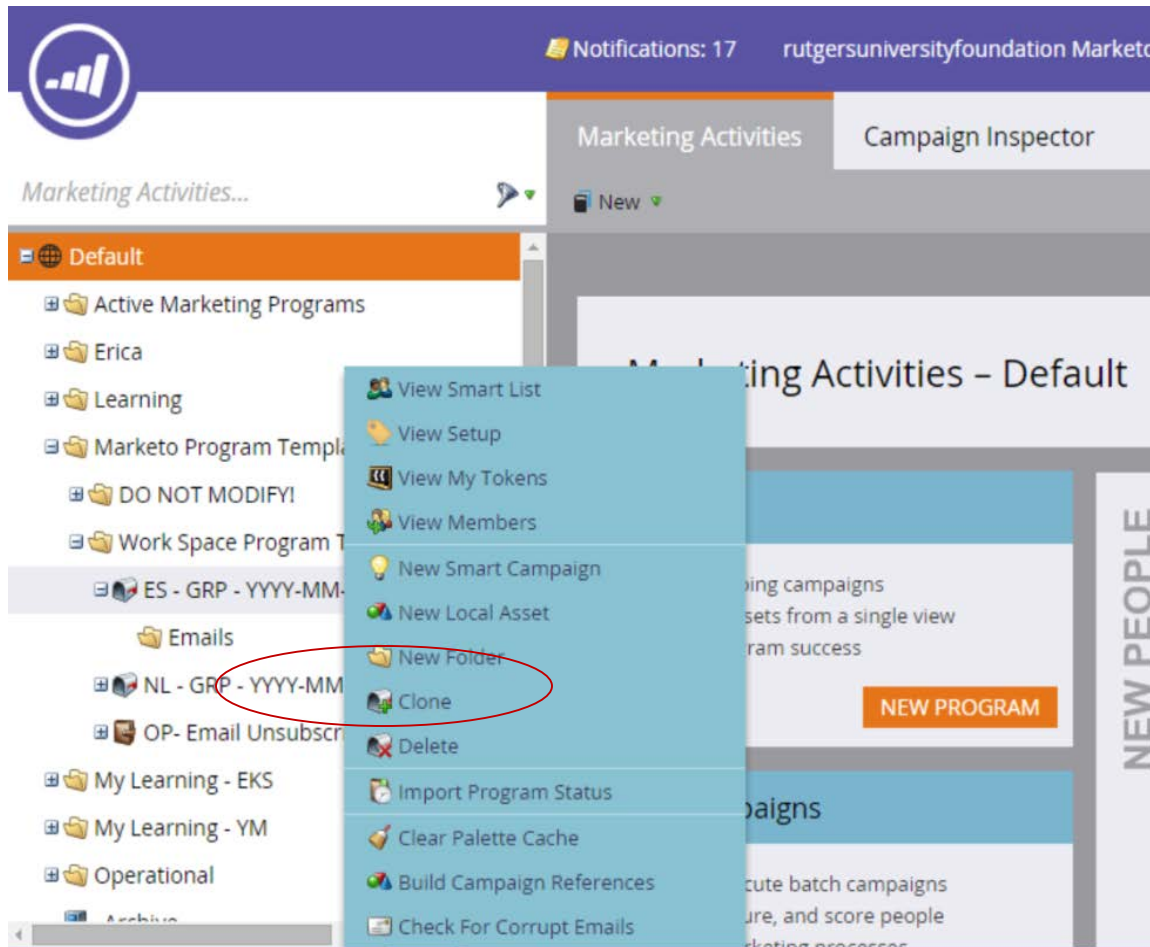
- How to navigate to your email programs from the Marketing Activities section of Marketo
- How to name and file things according to Marketo & Rutgers Best Practice
- How to customize an email send program
- How to approve and schedule your email to send
- How to view statistics on your email once sent

Navigate to your Marketing Activity Programs



- From the Marketo main screen, click the power ball in the top left corner and select “Marketing Activities”
- From the Marketing Activities tree, expand the “Marketo Program Templates” section
- Expand the “Work Space Program Templates” section to see your default marketing programs. You can further expand this section to see the program’s local assets (emails, newsletters, invites, etc.)

Clone a program to create your new Marketing Activity Program



- Right click the email send default program and select “Clone.” This will clone or copy the program (keeping a template for your future use) and allow you to customize one for sending.

Name and Save your new Marketing Activity Program

Notifications: 17 rutgersuniversityfoundation Marketo History Admin

Clone Email Batch Program

Clone From: ES - GRP - YYYY-MM-DD [Email Send]

Workspace: * Default

Clone To: * A Campaign Folder...

Folder: * Work Space Program Templates

Name: * ES - GRP - 2015-12-15 [Email Send]

Description:

CANCEL CREATE

Build and execute batch campaigns
Manage, nurture, and score people

- Place your cloned new email send program into your workspace folder
- Name your email send program according to [Marketo Best Practice](#) [INSERT RUAA CONVENTION]
- Click “CREATE” and Marketo will take you to your new program

Audience

ES - GRP - 2015-12-15 [Email Send] Smart List Setup My Tokens Members

New Program Actions

View: Control Panel

Audience ✓

people: 75

Blocked: 0

Edit Smart List Import List

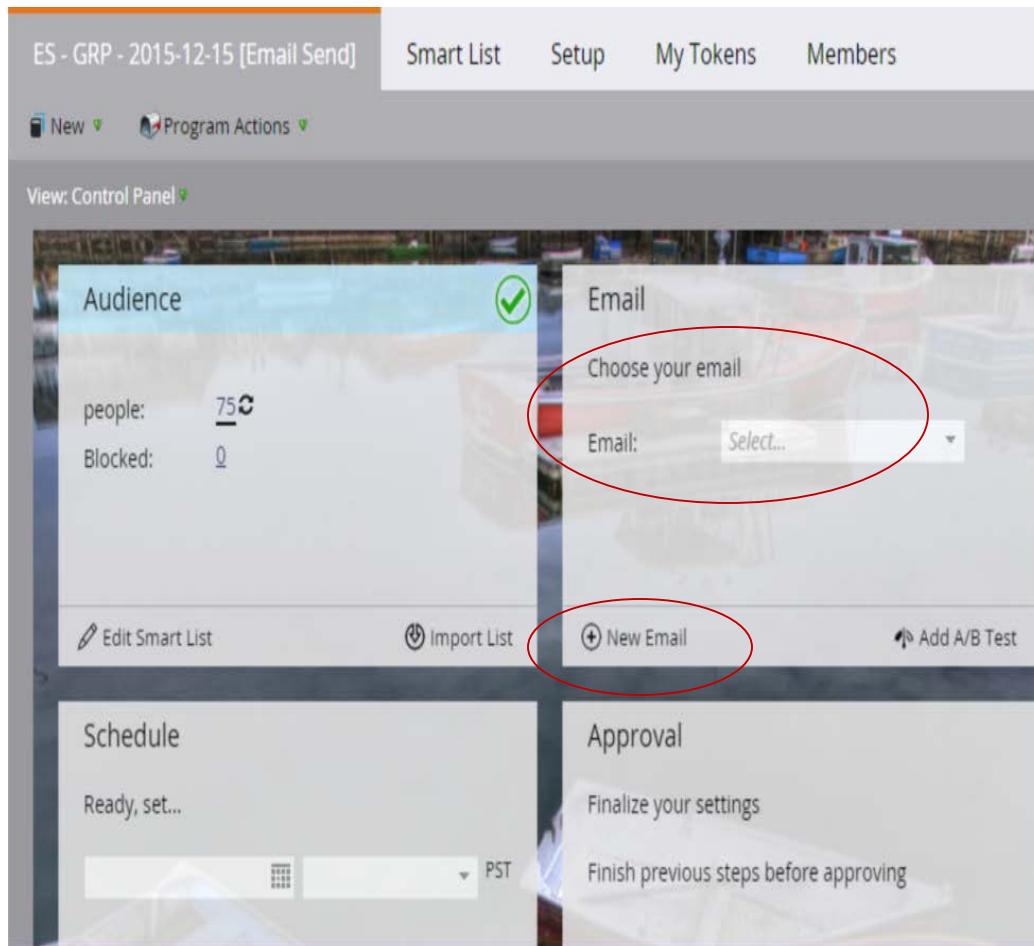
New Email Add A/B Test

Schedule Ready, set... PST

Approval Finalize your settings Finish previous steps before approving

- Double check the audience box to ensure your Smart List is pulling in the correct data -- This number is your emailable alumni audience.

Create and edit new Email



- Next, refer to the email box.
- Select the previously created email to edit and send, or
- If you do not have an email created, select “New Email”

Create and name new email

New Email [Close]

Program: * ES - GRP - 2015-12-15 [Email Send]

Name: * Email - December Email Send

Description: Happy Holidays

Template: * Banner with Sidebar [Search]

Operational Email (Bypass Unsubscribe / Marketing Suspended)

Open in editor

CANCEL **CREATE**

- The program field will automatically populate.
- Create an internal name for the email (see naming guidelines). This is not your email subject line.
- Add a description
- Select a template
- Click “Open in Editor”
- Click create

Edit new email

ES - GRP - YYYY-MM-DD [Email Send].Em... Community

Version: HTML | Email Actions | Show Edits | Edit Settings | Auto-saved: Dec 16, 3:06 PM EST

From Name: rutgersuniversityfoundation Marketo
From Email: rutgersuniversityfoundation@marketo.com
Reply-to: rutgersuniversityfoundation@marketo.com
Subject:

RUTGERS
University Alumni Association

Title of Email

Intro title:
Title of Email

Hello {{lead.First Name:default=Sir/Madam}},

Lorem ipsum dolor sit amet, consectetur adipiscing elit.
Pellentesque sit amet urna velit. Donec luctus

Column Title

SubTitle Goes here.

Lorem ipsum dolor sit amet,
consectetur adipiscing elit.

Email Content

- Segment By
- Static
- Subject
- From Name
- From Email
- Reply-to
- Logo
- header
- content
- col-title
- col-content
- footer
- Dynamic

Edit your new email

ES - GRP - YYYY-MM-DD [Email Send].Em...

Version: HTML

Email Actions

- Send Sample Email
- Edit Settings
- Copy All HTML to Text
- HTML Tools

From Name: rutgersu

From Email: rutgersu .com

Reply-to: rutgersu .com

Subject:

RUTGERS
University Alumni Association

Title of Email

Intro title:

Title of Email

Hello {{lead.First Name:default=Sir/Madam}},

Co

Sul

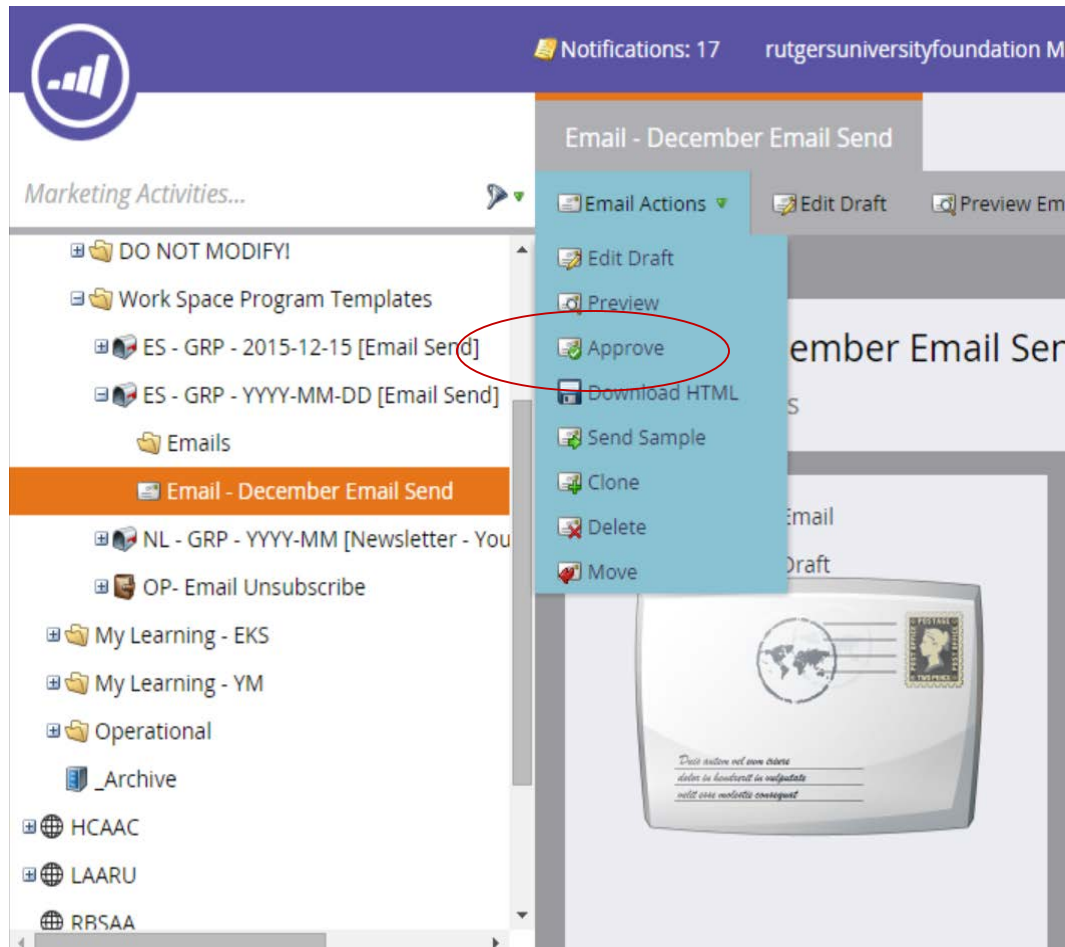
Lor

cor

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque sit amet urna velit. Donec luctus

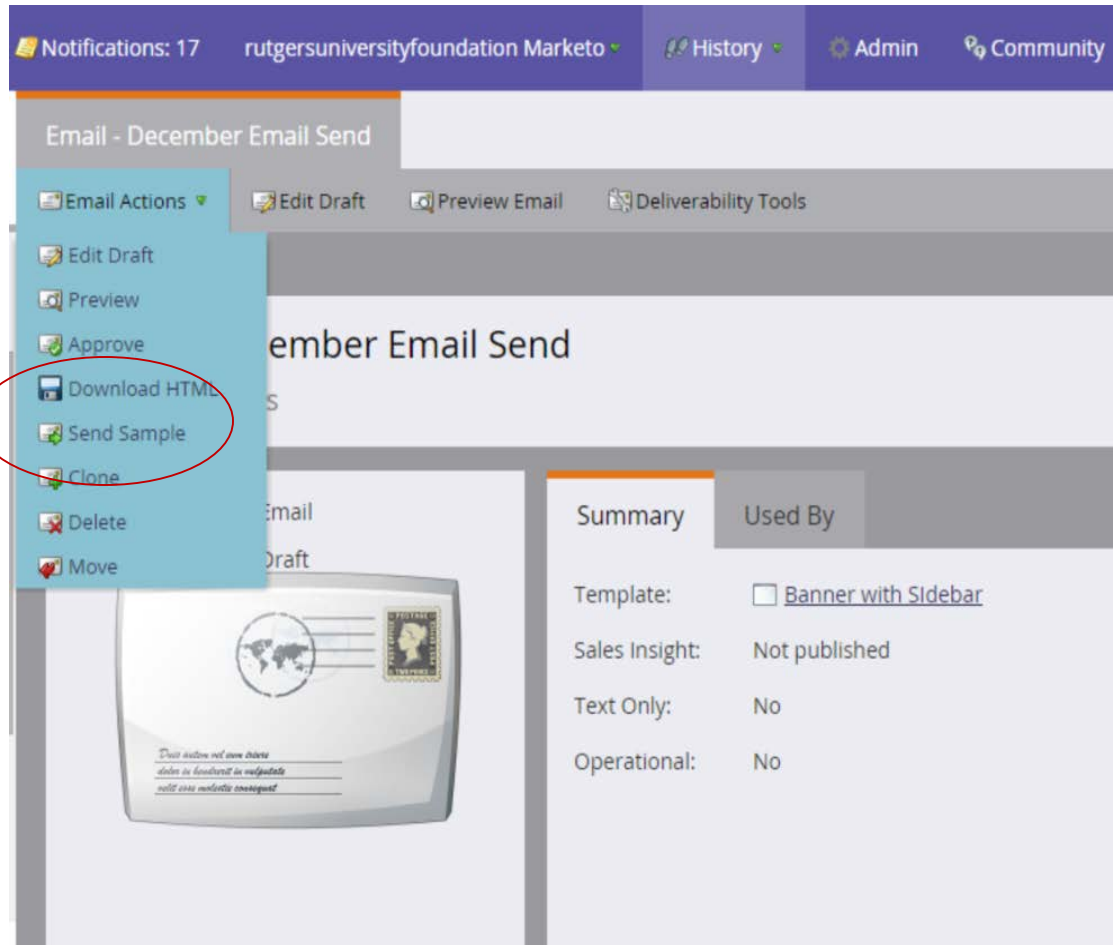
- First, edit the from name, reply to, and subject (do not edit the ‘from email’).
- Double click in the body of the email to edit email content
- Finally, you can view the [text version](#) and [send a sample email](#) by clicking the “Version” and “Email Actions” tabs

Approve your email



- To approve the email, click on the name of the email in the left-hand column, then click on the "Email Actions", then select "Approve"
- You can click and drag your email into an "Emails" folder to save.

Send a sample email



- To send a sample email, refer to the “Email Actions” tab and select “Send Sample.”

Send a sample email

Notifications: 17 rutgersuniversityfoundation Marketo History Admin

Email - December Email Send

Send Sample Email

Person: Name

Trigger: Select a Trigger

Choose previous address...

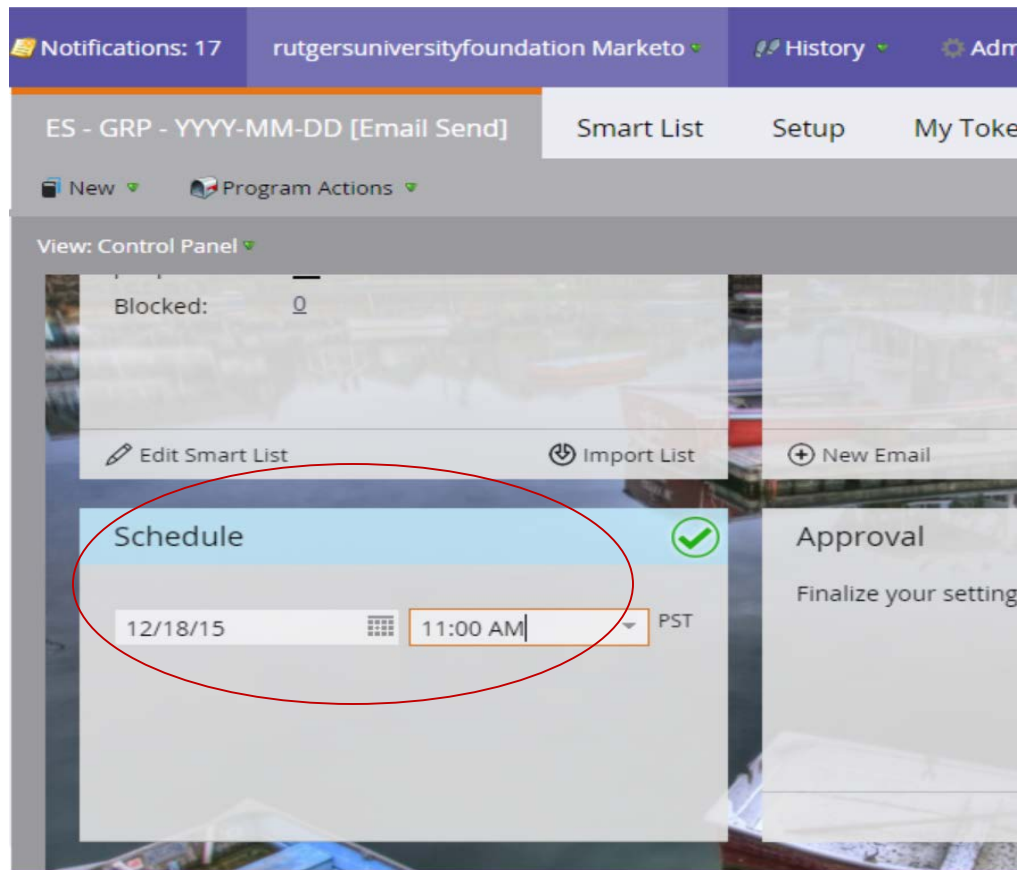
Send To: * name@domain.com

Also send text-only version

CANCEL SEND

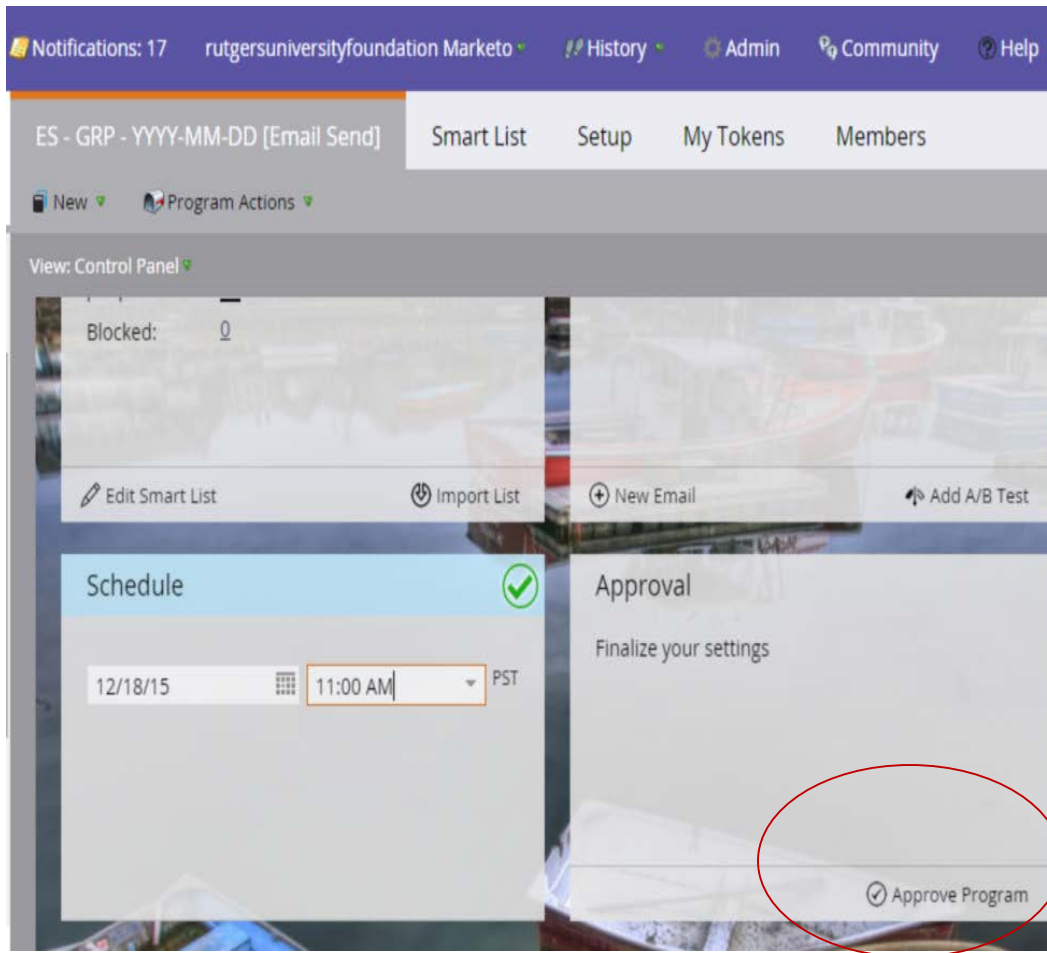
- Insert the recipient's name, and enter the recipient's email addresses you would like to send the test to
- Select the "Also send text-only version" box to check the style and links in all versions

Schedule your email



- Navigate to your program in the tree on the left side and click on your Email Send program
- In the “Schedule” box, select the date and time for your email to send

Approve your Email Send program



- To approve your program, the “Audience,” “Email,” and “Schedule” boxes must have green check marks in the upper right hand corner
- Click “Approve Program” – the email will then go out automatically at the scheduled time

Links to help you create and execute an email send program

- [Creating](#) and [understanding](#) an email send program
- [Name and save](#) your programs and local assets
- [Create an email](#) for your email send program
- [Send a sample](#) email to yourself
- [Schedule](#) an email send program
- [Approve](#) your email send program
- View the [email program dashboard](#) after email send