

# Mailshot Builder 2024

Tractivity® Help Guides

# Our New Mailshot Builder

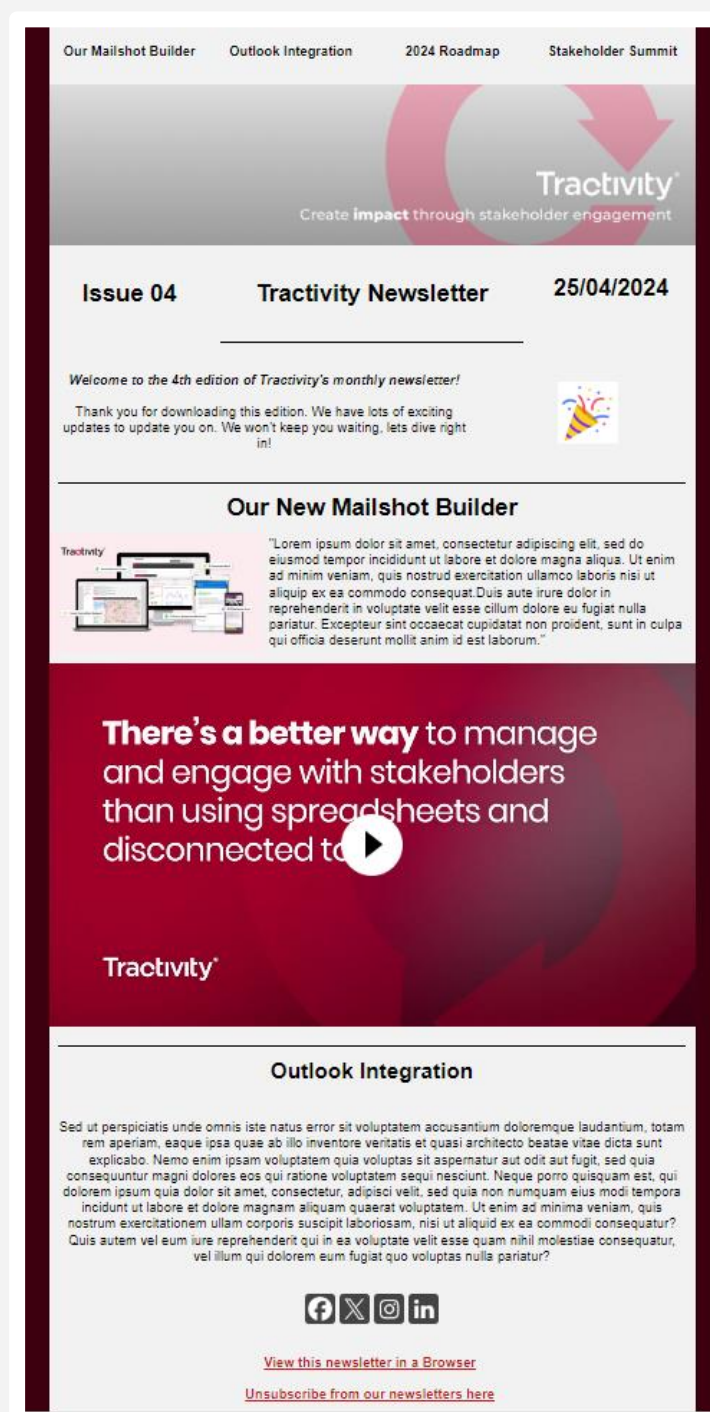
**Tractivity's new Mailshot builder** is a fresh revamp to our existing mailshot module. Our new builder offers further flexibility when designing newsletters for your stakeholders.

New features include:

- Create and save multiple templates for different stakeholder groups.
- Drag-and-drop functionality to build your articles.
- Design flexibility: change your branding colours instantly and select preferred column structures and layouts.

For a deep-dive into this new functionality, we strongly recommend arranging a training session with your dedicated Customer Success Manager.

2



# Accessing Mailshots

When accessing the Mailshots module, things should look familiar.

However, you will notice down the **left-hand menu** a new heading called **Templates**.

**Templates** will allow you to create what Tractivity previously provided. This wider Help Guide will demonstrate how to build a template.

You can select 'New Template' to get started.



## Tractivity<sup>™</sup> SmartMailer<sup>™</sup>

[Return to Tractivity](#)

### SmartMailer: My Mailshots

Display:

- All Mailshots
- My Mailshots

Mailshots:

- New Mailshot

Templates:

- All Templates
- New Template

Newsletters (11)

Title	Description	Created Date	Sent Date	Status	Edit	Archive
Thom test	Thom test	24/04/2024		Tested	Edit	Archive
RG Testing	Test	24/04/2024		Scheduled	Cancel	Archive
Kate Test Mailshot	Test	23/04/2024		Draft	Edit	Archive
Don Demo						

# Create a New Template

The below steps will explain how to create a new template for your newsletters.

1. From the **My Mailshots** screen, from the **left-hand menu**, select **New Template** to start creating your own template.
2. Provide a **title** and select the option **Blank Template** (you will also have access to a **Demo Template**)
3. Click either **Save Template** or **Save & Edit Template** if you wish to start creating the template straight away

## Please note:

Clicking **Save Template** will now store this template within **All Templates**.

Clicking **Save & Edit Template** will take you to our new builder. Further insight on this will be provided throughout the guide under pages marked **Content**.

SmartMailer: New Template

1

Display:

- All Mailshots
- My Mailshots

Mailshots:

- New Mailshot

Templates:

- All Templates
- New Template

2

Title

Select a template to use as the starting point for your mailshot \*

Blank

Demo Mailshot

Kate Test

Luke Test

Thom's template

Dan Test

3

SAVE TEMPLATE

SAVE & EDIT TEMPLATE

# All Templates

Our new mailshot functionality will allow you to create as many templates as you wish.

For example, you can have one template that features an **Unsubscribe** option and another that does not.

The new functionality allows you to be more flexible with your designs and the way in which you communicate with your stakeholders.

To review all your templates, from the **left-hand menu** simply choose the option **All Templates**

When you're ready to create a mailshot, you can use one of the templates that have been set up!

## SmartMailer: All Mailshot Templates

### Display:

- All Mailshots
- My Mailshots

### Mailshots:

- New Mailshot

### Templates:

- All Templates
- New Template

### Templates

Title	Created Date	Edit	Archive
User Guide Template	16/04/2024	Edit	Archive
Dan Test - Tractivity	16/04/2024	Edit	Archive
Luke Template	16/04/2024	Edit	Archive
Caroline's Template	16/04/2024	Edit	Archive
Monthly R	16/04/2024	Edit	Archive
Mollie - Test Mailshot	16/04/2024	Edit	Archive
Thom's template	16/04/2024	Edit	Archive

# Create a new Mailshot

Once you have created a template, you can use this to build a newsletter.

You may be somewhat familiar on building a mailshot in Tractivity prior to our new functionality.

To build a new mailshot, select **New Mailshot**.

You can now start the process of building a mailshot:

**Steps 1 to 5** largely remain the same, however the next 5 pages details the information you need to set up the framework for your mailshot.

## Display:

- All Mailshots
- My Mailshots

## Mailshots:

- New Mailshot



## Templates:

- All Templates
- New Template

1

Mailshot Details

2

Distribution List  
Recipients

3

CSV Recipients

4

Review Recipients

5

Build Mailshot

# Create a new Mailshot:

## Step 1 (1/2)

**Step 1** of create a mailshot is the framework for your content

### 1. Mailshot Details:

**Mailshot Title** e.g. Monthly Newsletter (this is internal only)

**Mailshot Description** e.g. to be sent on XX/XX (this is internal only)

**Email Subject** will show in the subject line for recipients in their inbox

**From Name** will show in the From line for recipients in their inbox

**From Email Address** will show in From address line for recipients in their inbox

**Reply-To Email Address** the email recipients can respond to

**HTML** set to Yes so if images are blocked due to security they can view in a Browser

**Priority** if High this will show the red ! Icon in the recipient inbox

**Owner Teams** the license holders responsible for creating/sending/reviewing stats

### SmartMailer: Create Mailshot

Display:

- All Mailshots
- My Mailshots

Mailshots:

- New Mailshot

Templates:

- All Templates
- New Template

Mailshot Details

Distribution List  
Recipients

CSV Recipients

Review Recipients

Build Mailshot

#### Mailshot Details

Enter basic details about the mailshot, including the subject line that will appear for your mailshot and who the email will appear from.

SAVE AND EXIT

CANCEL

Mailshot Title (internal use only)*	<input type="text"/>
Mailshot Description* (internal use only)	<input type="text"/>
Email Subject*	<input type="text"/>
From Name*	<input type="text"/>
From Email Address	testing@server.smartmailer.tractivity.co.uk ▼
Reply-To Email Address* (if a recipient replies)	<input type="text"/>
Include Link to HTML webpage Version	Yes ▼
Priority	Normal ▼
Owner Teams*	<div> <div>Communications Team</div> <div>Engagement Team</div> <div>Enquiry Team</div> <div>New Stakeholder Team</div> <div>Training Project (Do Not Use)</div> </div>

# Create a new Mailshot: Step 1

**Template** is a new step, allowing you to select any pre-made templates to edit for sending. You can also select a **Blank** template to start from scratch should you wish.

You can add **Attachments** but please note that if you have over 1000 recipients in your Distribution List(s) the attachment **will not be sent**.

We would advise using URL links within your mailshot if you do have an audience above 1000.

## Template

Select the template you wish to use for your mailshot:



Blank



Demo Mailshot



Kate Test



Luke Test



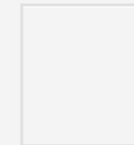
Thom's template



Dan Test



Monthly Updates



Help Guide



Vicky Test

## Attachments

Please Note: Attachments will not be sent if there are more than 1000 recipients.

Add Attachment



Drag a file here  
or click to select.

Attached File(s)

Attachment Total Size  
(Maximum size 2Mb)

0.0Mb

NEXT

## Create a new Mailshot: Step 2

**Step 2** requires you to add your **Distribution List recipients**.

You can continue to create your lists in the **Distribution Lists** module, **nothing has changed regarding this process**.

1. Select the **Distribution Lists** you'd like to include – you can choose as many as you like by clicking the available **Contact/Organisation lists**
2. When you've completed this, click **Next**
3. Alternatively, click **Save and Exit** if you need to move on to something else and come back to your mailshot later

1

1 Mailshot Details 2 **Distribution List Recipients** 3 CSV Recipients 4 Review Recipients 5 Build Mailshot

---

### Distribution List Recipients

Select the distribution lists that you want to receive the mailshot.

3

**SAVE AND EXIT** **CANCEL**

Distribution Lists 1

Contact: (3)

2

BACK NEXT

2

# Create a new Mailshot: Step 3

**Step 3 allows you to add recipients via CSV.**

1. Click the **icon** to download the CSV template

*Outside of Tractivity: complete the CSV with the relevant contact information*

2. Import this CSV back into Tractivity by clicking **Upload CSV**
3. Click **Next**

**Please note:**

Any contacts added via the CSV method will **not** be:

- Added to the system as a Contact under Organisations & Contacts
- Have an automatic 'Mailshot Sent' activity in the system

1

1

Mailshot Details

2

Distribution List Recipients

3

CSV Recipients

4

Review Recipients

5

Build Mailshot

### CSV Recipients

Upload recipients from your machine in csv format if you need to.

1

 (click this icon to download a template for the csv upload).

2

CSV Upload

Choose File

No file chosen

2

UPLOAD CSV

BACK

3

NEXT

SAVE AND EXIT

CANCEL

# Create a new Mailshot: Step 4

**Step 4 allows you to review the recipients that will eventually receive the mailshot you are about to build.**

If you're happy with the recipients, please click **Next**

12345

Mailshot DetailsDistribution List RecipientsCSV RecipientsReview RecipientsBuild Mailshot

Review Recipients

Review recipients, you can remove csv recipients at this stage if required.

SAVE AND EXITCANCEL

Distribution List Recipients

▼List Name	First Name	Last Name	Company	Email Address
all Stakeholders - Mailshot				
all Stakeholders - Mailshot				
all Stakeholders - Mailshot				

CSV Recipients

There are no CSV Recipients for this mailshot

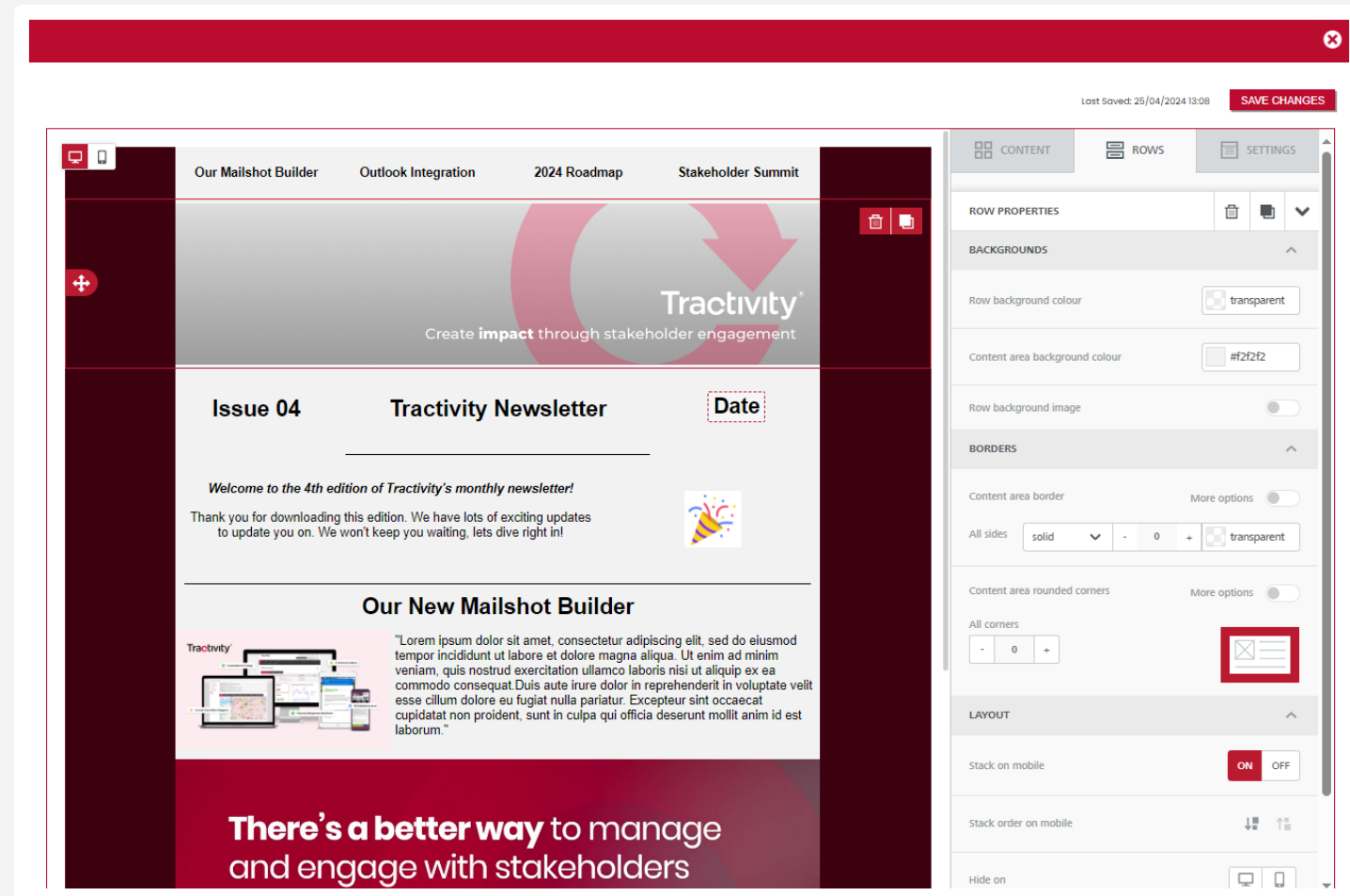
BACKNEXT

# Create a new Mailshot: Step 5

**Step 5 will take you to our new mailshot builder.**

Our new builder offers more flexibility and replaces the tiles previously available within the old builder.

**The next pages detail the functionality available to build your content within Tractivity.**



# Rows: How to Use

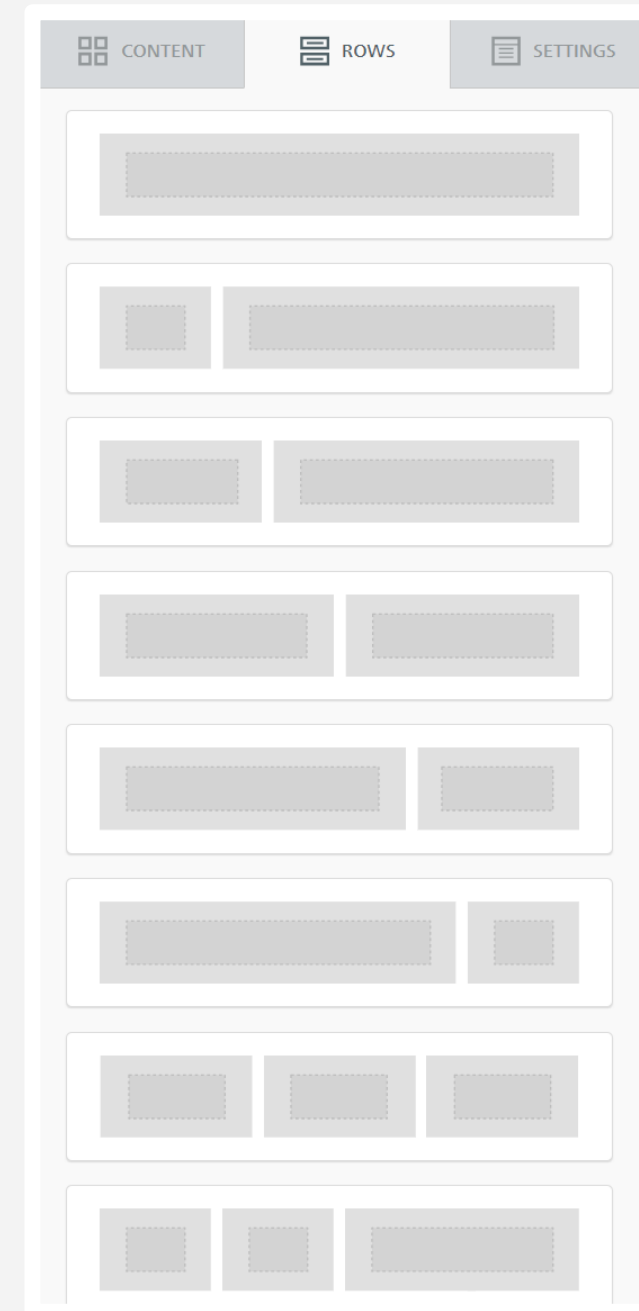
**You can use different scale rows in which to input your content. Rows are the framework of how you need your mailshot to look.**

For example, would you like an image alongside text? Or two columns side-by-side?

**No problem,** you have a wide selection of options to choose from.

You can drag-and-drop your preferred row layout and then add your content to it to start shaping your mailshot as you require.

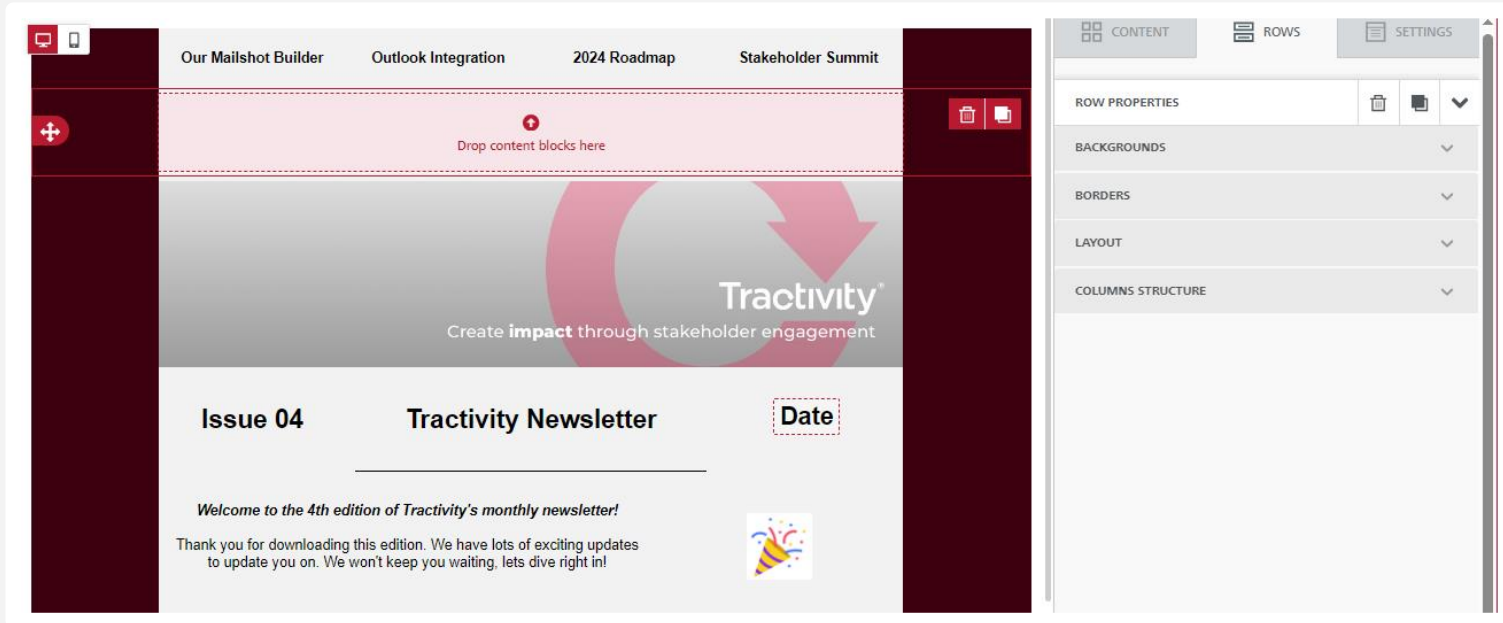
Please see the next page on how to edit rows.



# Rows: How to Edit

Once you have added your preferred rows to the article, you can make several changes.

To do this, click on the row when the **solid red line** is showing to edit within **Row Properties**



# Rows: Backgrounds




A Row Background allows you to add your branded guideline colours and even imagery from File Manager.

**Please note:** we recommend you have access to your organisation's brand guidelines when building a mailshot in our new builder. You now have control over your colours throughout the entire mailshot.


2

1


ROW PROPERTIES




BACKGROUNDS




Row background colour

 transparent

Content area background colour

 #ffffff

Row background image




Choose image

Url

Apply image to

Content area

Row

 Fit to background

☐ Repeat

☐ Center

Background image support varies across email clients. Choose a fallback content area background color for optimal results.

# Rows: Borders

**Row Borders** gives you freedom to design around the article how you'd like.

**Content area boarder** gives you the ability to have different edge styling, such as **solid**, **dotted** or **dashed** borders around an article. You can choose the thickness and the colours in the second and third options.

**Content area rounded corners** allows for a softer edge around your article.

If you do wish to opt for consistency across your mailshot, each row you set up will need to be amended individually.

1

BORDERS

Content area border

More options ☒

Top


solid

▼

-

0

+

 #000000

Right


solid

▼

-

0

+

 transparent

Bottom


solid

▼

-

0

+

 transparent

Left


solid

▼

-

0

+

 transparent

Content area rounded corners

More options ☒

Top-left

-

21

+

Top-right

-

21

+

Bottom-left

-

21


+

Bottom-right

-

21

+



2

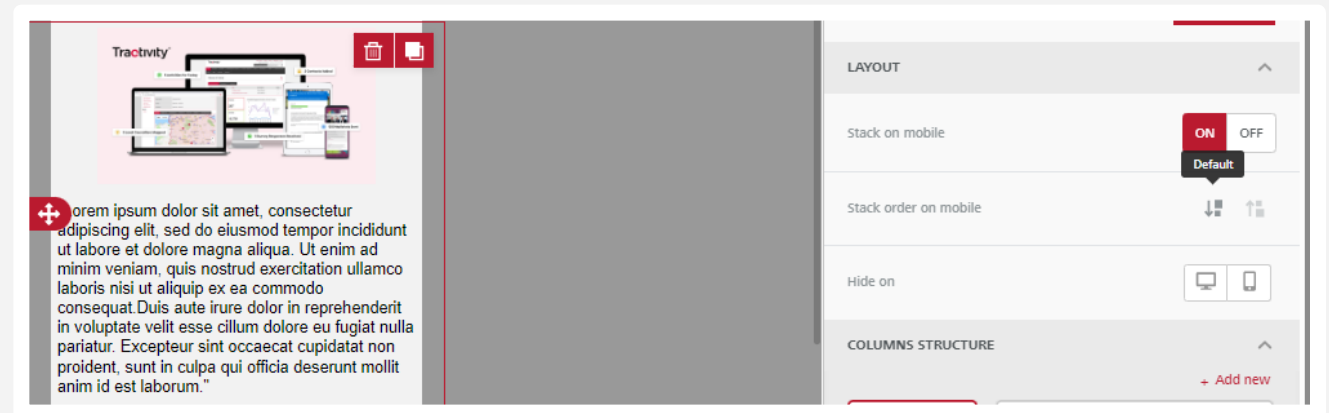
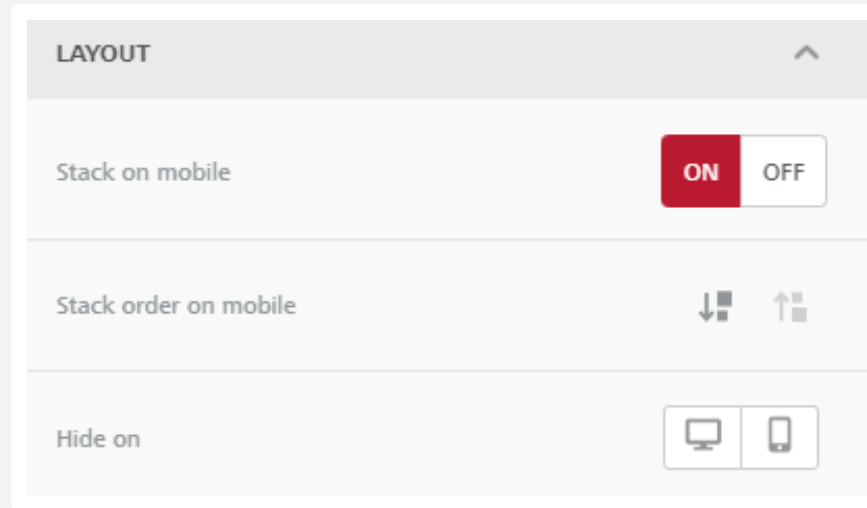
# Rows: Layout

As you can adapt your mailshot for desktop and mobile, you can differentiate how your rows look on either device.

**Stack on mobile** allows you to define the best way to display your content for stakeholders who use mobile devices.

If **ON** the stack order is the default, though you can change to reverse should you wish. The images overleaf shows that stacking provides additional flexibility as to where your images should be placed.

**Hide on** allows you to hide certain pieces of content on either a mobile and/or desktop.



# Rows: Column Structure

You can change your column structure here.

In this example the first option in **Rows** has been selected, which runs across the builder without a break.

Should you wish to change this:

Click **+ Add new** to split off the structure, and if you've gone too far, simply click **Delete**. This way you can experiment with the structure you'd like to use.

2


1

### COLUMNS STRUCTURE

+ Add new

12

#### COLUMN 1

Column background  transparent

Padding More options ☒

Top 

- 5 +

Right 


- 0 +

Bottom 

- 5 +

Left 

- 0 +




Border More options ☐

All sides 

solid ▼

- 0 +

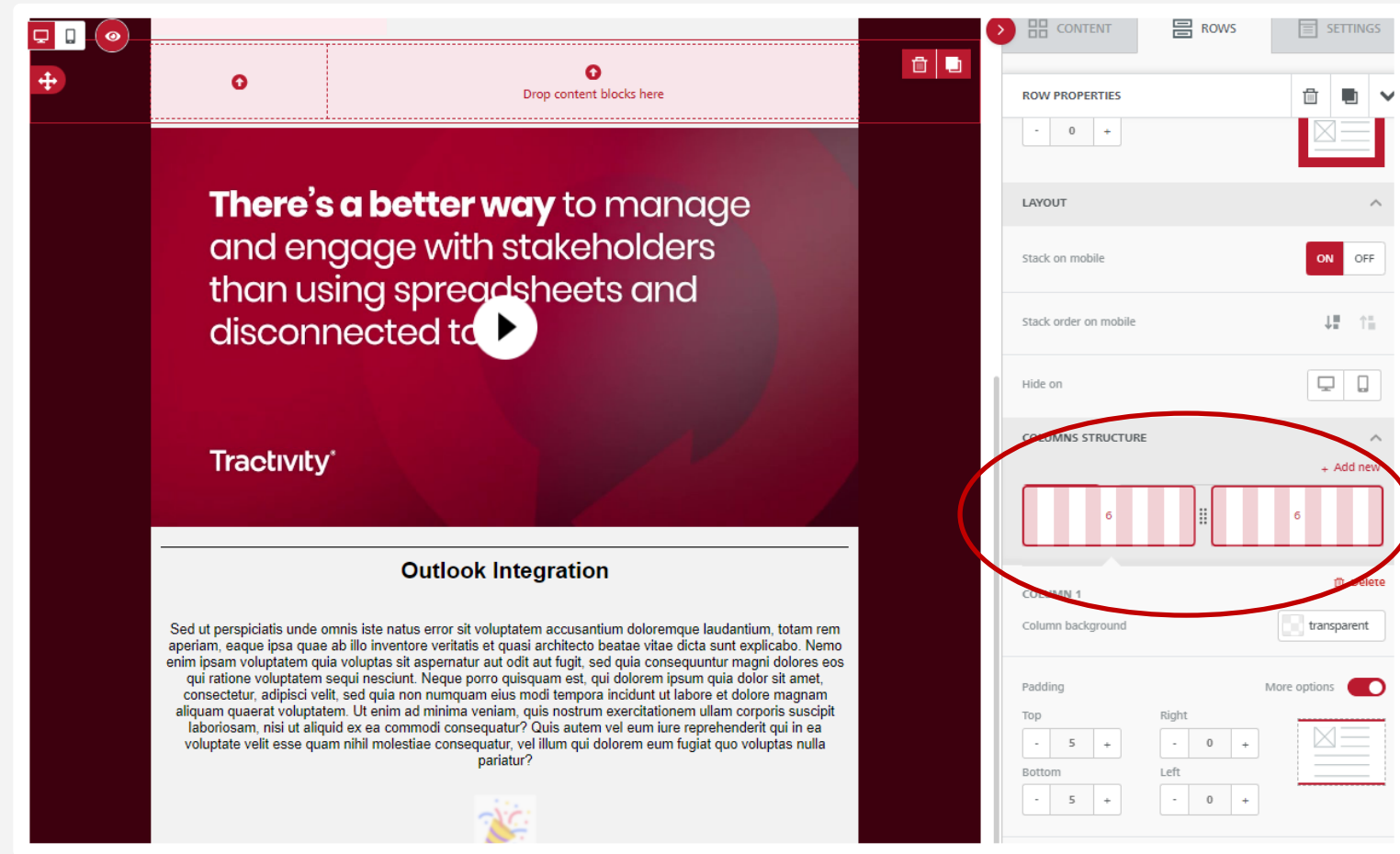
 transparent

# Rows: Column Structure Flexibility

**You can select pre-structured rows for your articles, but also have the freedom and flexibility to create bespoke structures.**

You can drag the icon between the columns left to right, or vice versa, to create a structure better suited to your needs.

**Once you release the icon the row structure will automatically change to the chosen set up within the content area.**



# Settings: Overview

**Settings** allows you to configure the framework of your mailshot template.

**Content area width** allows you to choose how the content will appear to the stakeholder. For example, you could have this less wide with blank space either side to include your branded colours in **background colour**

**Content area alignment** is related to positioning.

**Default font** means you can set the font here automatically without needing to change this in every paragraph/title content block you create later.

**Link colour** allows you to add branded colours to any links you include in your content.

1

CONTENT

ROWS

SETTINGS

GENERAL OPTIONS

Content area width

675px

-

+

Content area alignment

Left

Center

Background colour

#d50032

Content area background colour

#####

Default font

Arial

▼

Link colour

#ff819c

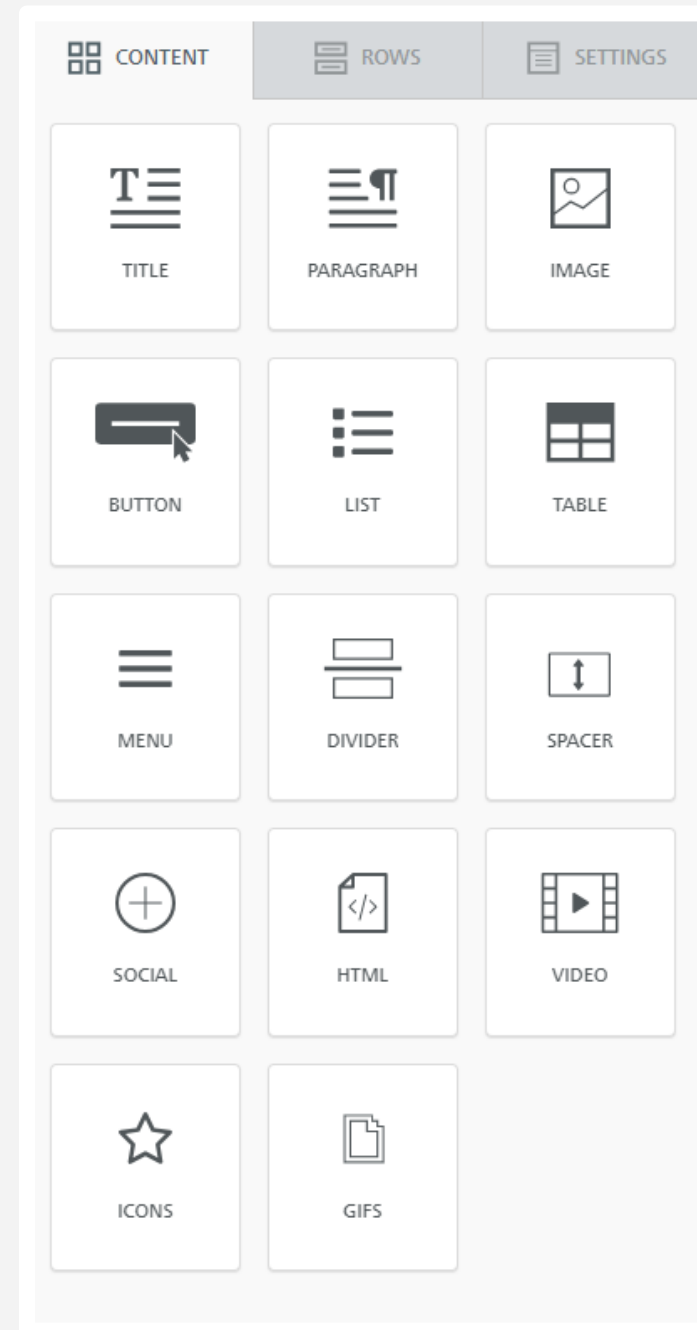
2

# Content: Overview

Our Content library gives you the freedom to build bespoke mailshots.

You can drag-and-drop any of the options into rows to design your stakeholder content.

The following pages will provide insight into all the **Content** options, so you have a firm understanding of how to seamlessly create newsletters for your stakeholders.

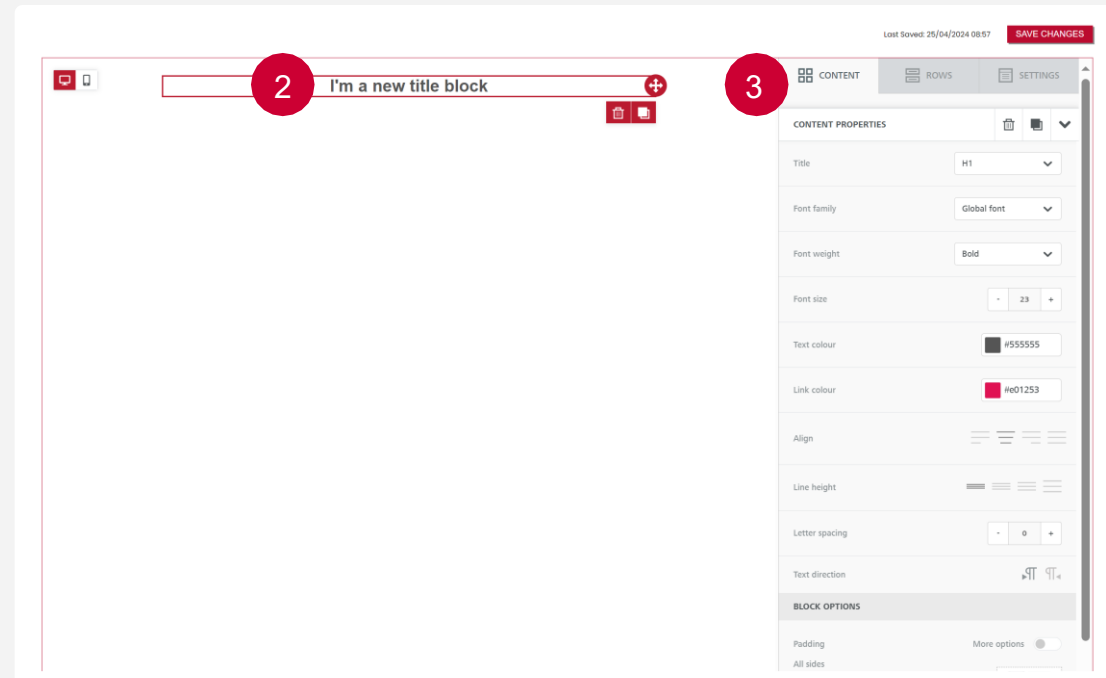
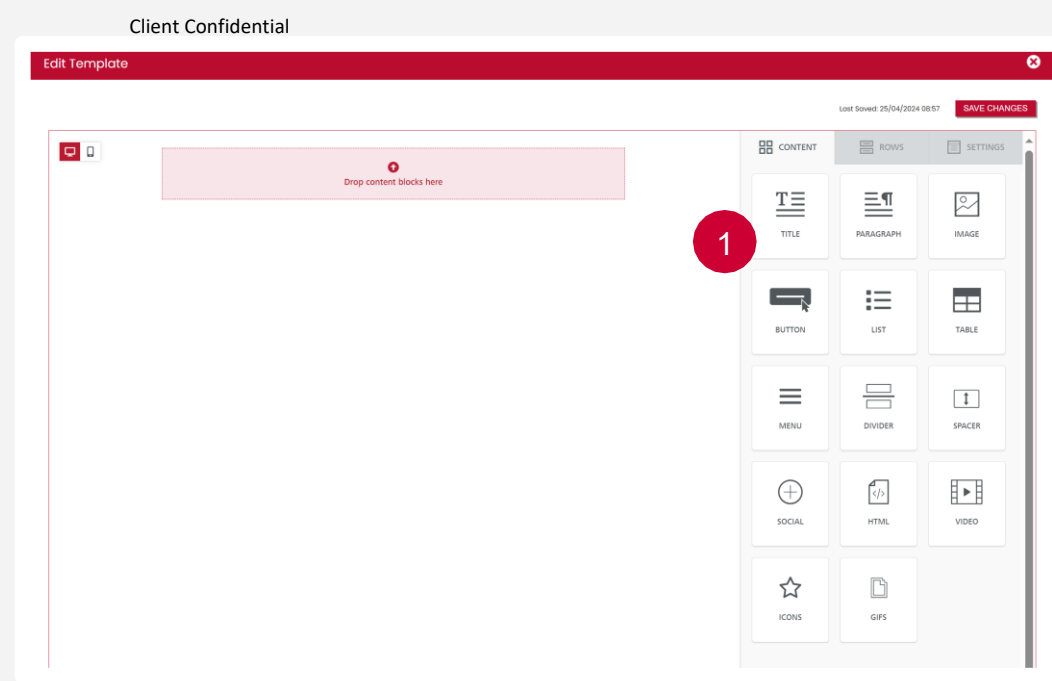


# Content: Title

**Title** allows you to create a text heading.

1. You can drag **Title** into your chosen row
2. This will then appear as **I'm a new title block**
3. The text will appear basic, but you can customise this to your needs through **Content Properties**. You can:

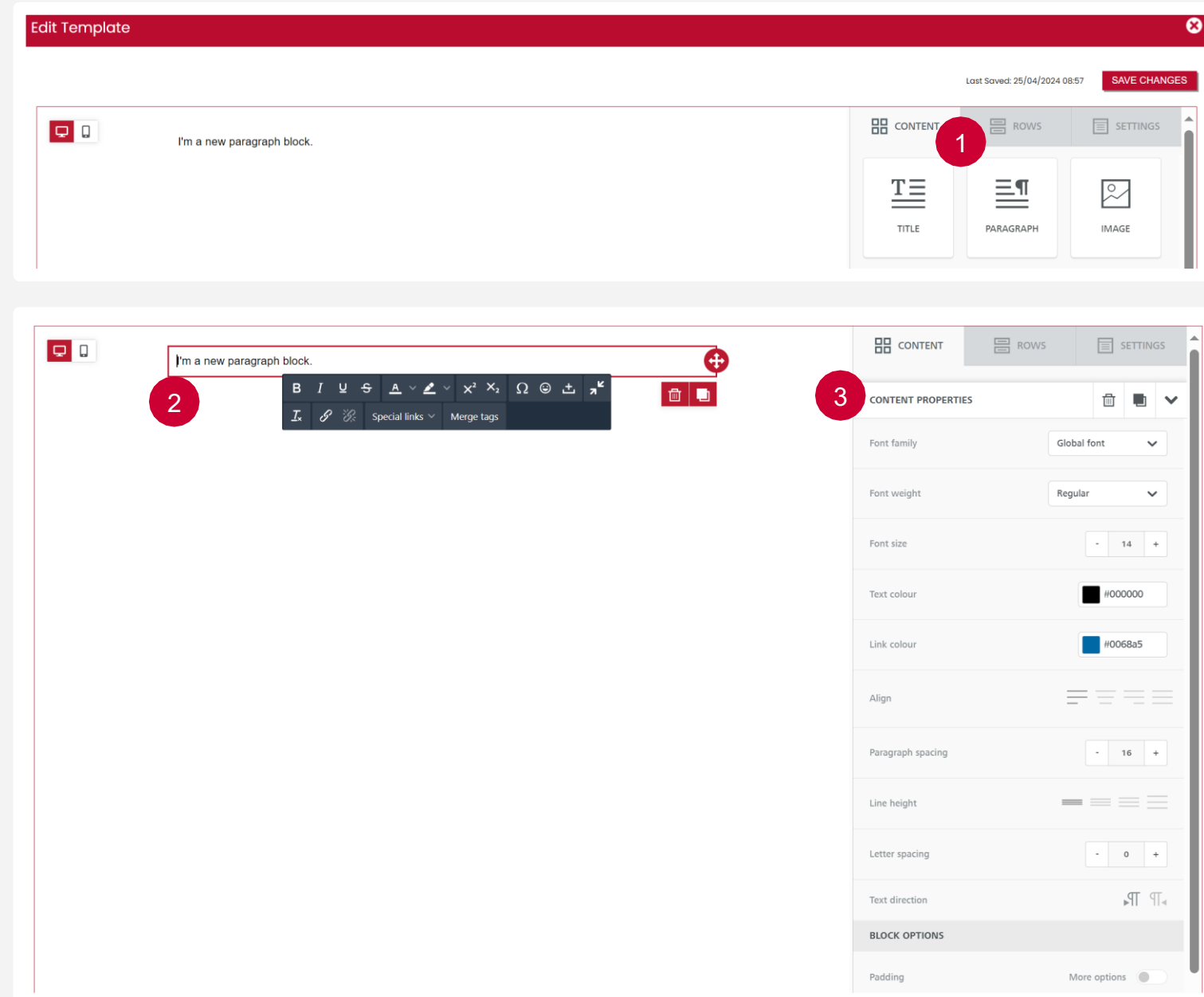
- Change the **Font** style, weight and size
- Use your own specific branding for **colours**
- **Align** to the required style
- Set a **line height**, **letter spacing** and **text direction**
- You can set **padding** to make titles take more centre stage in your mailshots



# Content: Paragraph

**Paragraph** allows you to write out your article content.

1. You can drag **Paragraph** into your chosen row.
2. This will then appear as **I'm a new paragraph block**
3. The text will appear basic, but you can customise this to your needs through **Content Properties**. You can:
  - Change the **Font** style, weight and size
  - Use your own specific branding for **colours**
  - **Align** to the required style
  - Set a **line height**, **letter spacing** and **text direction**
  - You can set **padding** to make paragraphs take more centre stage in your mailshots



# Content: Image

**Image** allows you to add banners and other visual aids.

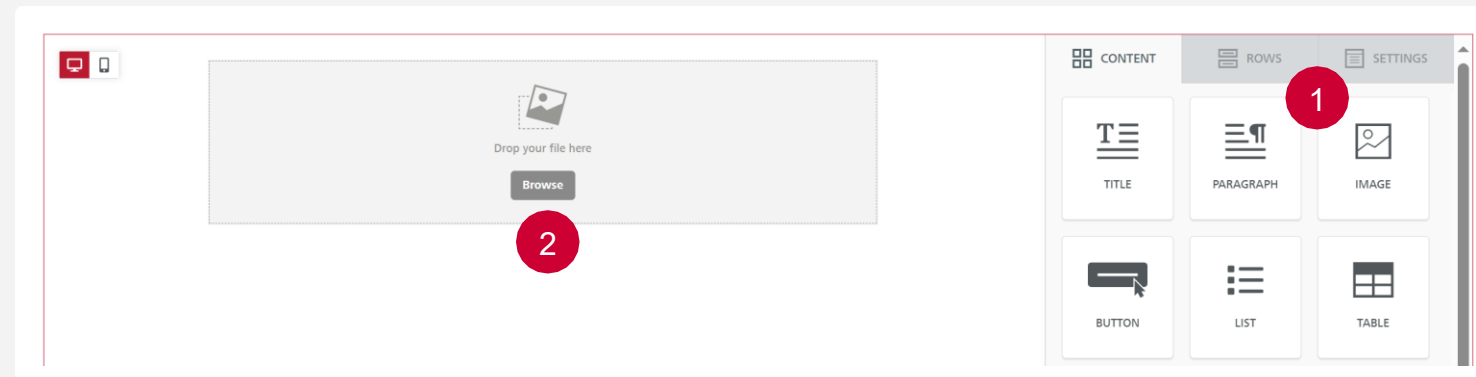
1. You can drag **Image** into your chosen row
2. Select **Browse** to ensure you can upload images of your choice

You will be taken to our File Manager where you can add all images you will use in your mailshots.

## Please note:

The image will wrap around the size of the row you have chosen.

You can re-size images via **Content Properties** in **Settings**



# Content: Button

**Button** can be a call to action within your mailshots.

1. You can drag **Button** into your chosen row and apply your own text.
2. Within **Content Properties** you can apply the relevant URL and amend button branding colours, text fonts and sizes

The screenshot displays the email editor interface, divided into three main sections: a central workspace, a top toolbar, and a right-hand sidebar.

**Top Toolbar:** Features icons for desktop and mobile views, a 'Button' content type icon, and tabs for 'CONTENT', 'ROWS', and 'SETTINGS'. A red circle with the number '1' highlights the 'CONTENT' tab.

**Central Workspace:** Shows a blue 'Button' element being added to a row. A red box highlights the row, and a red circle with the number '2' highlights the 'Button' element. Below the row is a rich text editor toolbar with options like Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Bulleted List (X), Numbered List (X), Link (Ω), Unlink (⊖), Link icon, Italic icon, and Merge tags. To the right of the toolbar are icons for undo and redo.

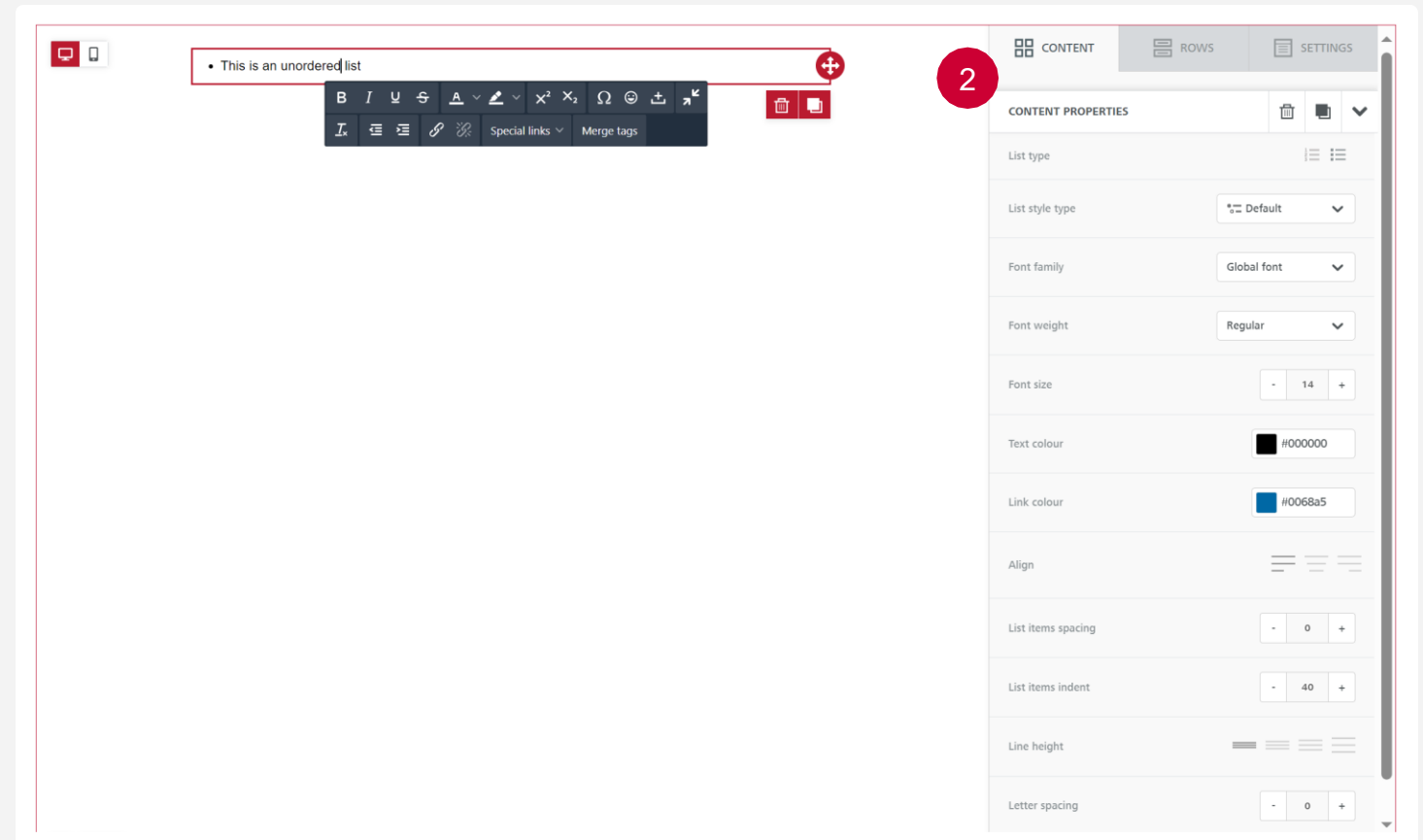
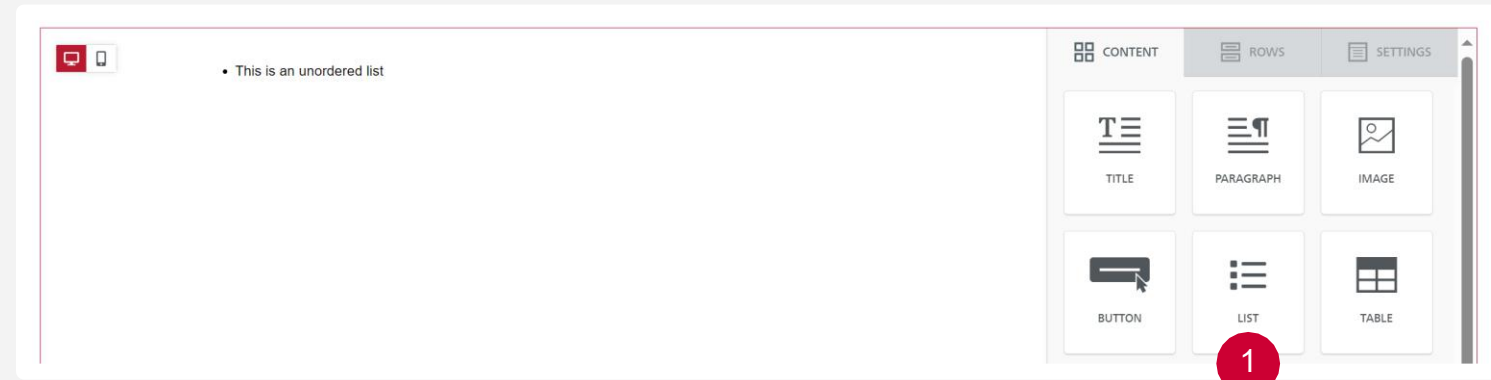
**Right-hand Sidebar:** Contains the 'CONTENT' tab, 'CONTENT PROPERTIES', 'ACTION', and 'BUTTON OPTIONS' sections.

- CONTENT PROPERTIES:** Includes a 'Link type' dropdown set to 'Open web page', a 'Url' input field, and a 'Special links' section with a 'Link file' option.
- BUTTON OPTIONS:** Includes a toggle for 'Auto width' (checked), a 'Font family' dropdown set to 'Global font', a 'Font weight' dropdown set to 'Regular', a 'Font size' input field set to '14', a 'Background colour' input field set to '#3aaee0', a 'Text colour' input field set to '#ffffff', an 'Align' dropdown set to 'Left', a 'Line height' dropdown set to '1.5', and a 'Letter spacing' input field set to '0'.

# Content: List

**List** allows you to itemise your content.

1. You can drag **List** into your chosen row and apply your own text. You'll notice the text is bullet-pointed. Clicking **enter** allows you to add additional bullets.
2. Within **Content Properties** you can apply the relevant font changes, list item spacing, indent alignment and list types (bullets or numbers)



# Content: Table

**Table** allows you to create bespoke tables.

1. You can drag **Table** into your chosen row
2. Within **Content Properties** you can apply several changes, including:
  - The number of columns & rows you require
  - Border branded colours
  - Header content changes
  - Content font changes

The screenshot displays a design tool interface with a table being added to a content block. The interface is divided into two main sections: a workspace on the left and a properties panel on the right.

**Workspace:** A table is shown with a header row labeled "Add header text" and two data rows labeled "Add text". The table is highlighted with a red border, and a red circle with the number "1" is placed next to it, indicating the first step of the process.

**Properties Panel:** The panel on the right is titled "CONTENT" and contains a "CONTENT PROPERTIES" section. This section includes a "LAYOUT" dropdown, a "HEADER" section with a "Header row" toggle, and a "CONTENT" section with various font and color settings. A red circle with the number "2" is placed next to the "CONTENT PROPERTIES" section, indicating the second step of the process.

**Table Structure:** The table has 3 columns and 3 rows. The header row is labeled "Add header text" and the data rows are labeled "Add text".

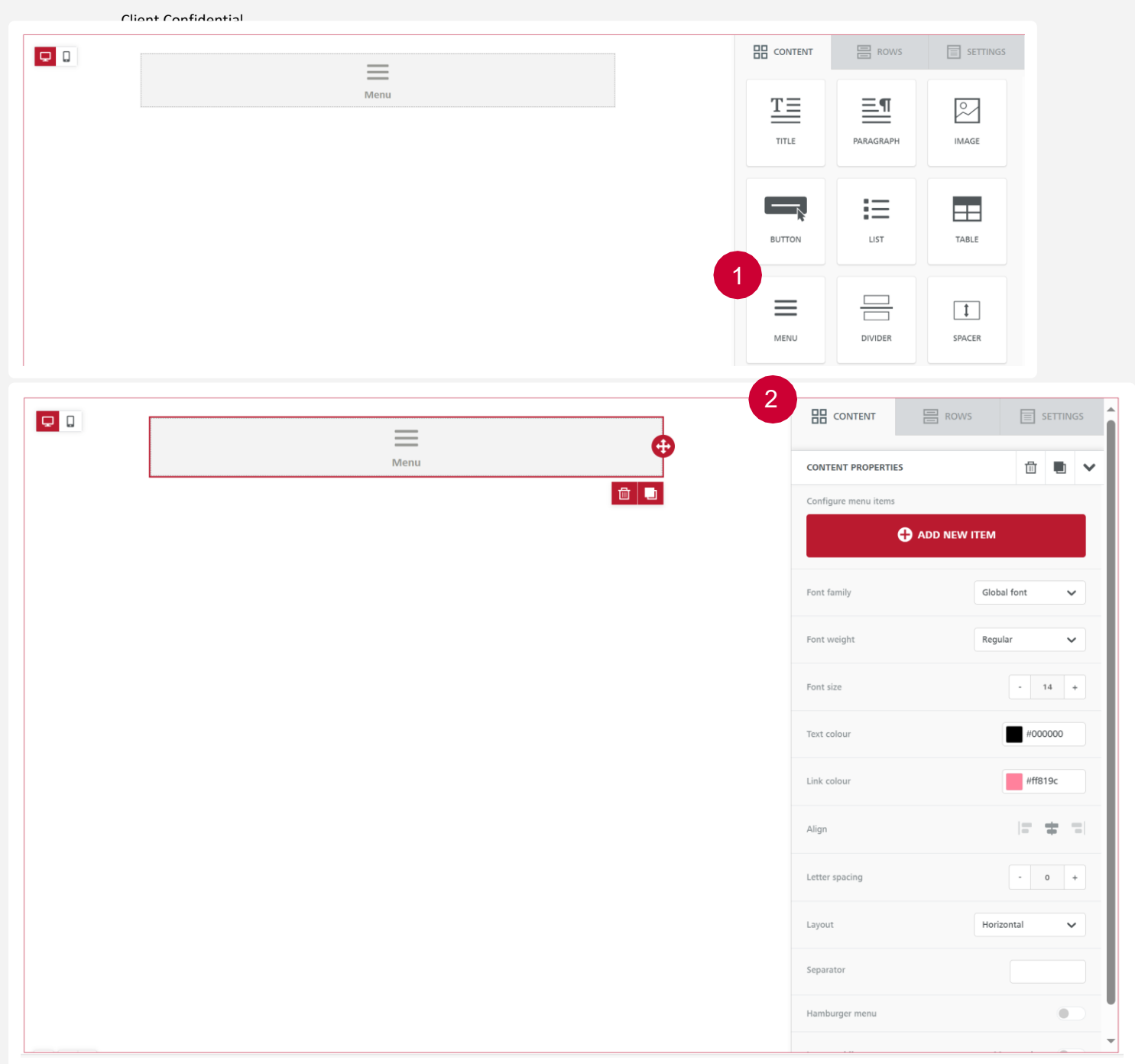
**Content Properties:** The "CONTENT PROPERTIES" section includes the following settings:

- Header row:** Toggled on (red switch).
- Background colour:** #eaeaea.
- Font weight:** Regular.
- Font size:** 14.
- Text colour:** #505659.
- Align:** Left.
- CONTENT:**
  - Font family:** Global font.
  - Font weight:** Regular.
  - Font size:** 14.
  - Text colour:** #000000.

# Content: Menu

**Menu** allows you to include a variety of links, including ways for your stakeholders to contact you or view additional project work elsewhere.

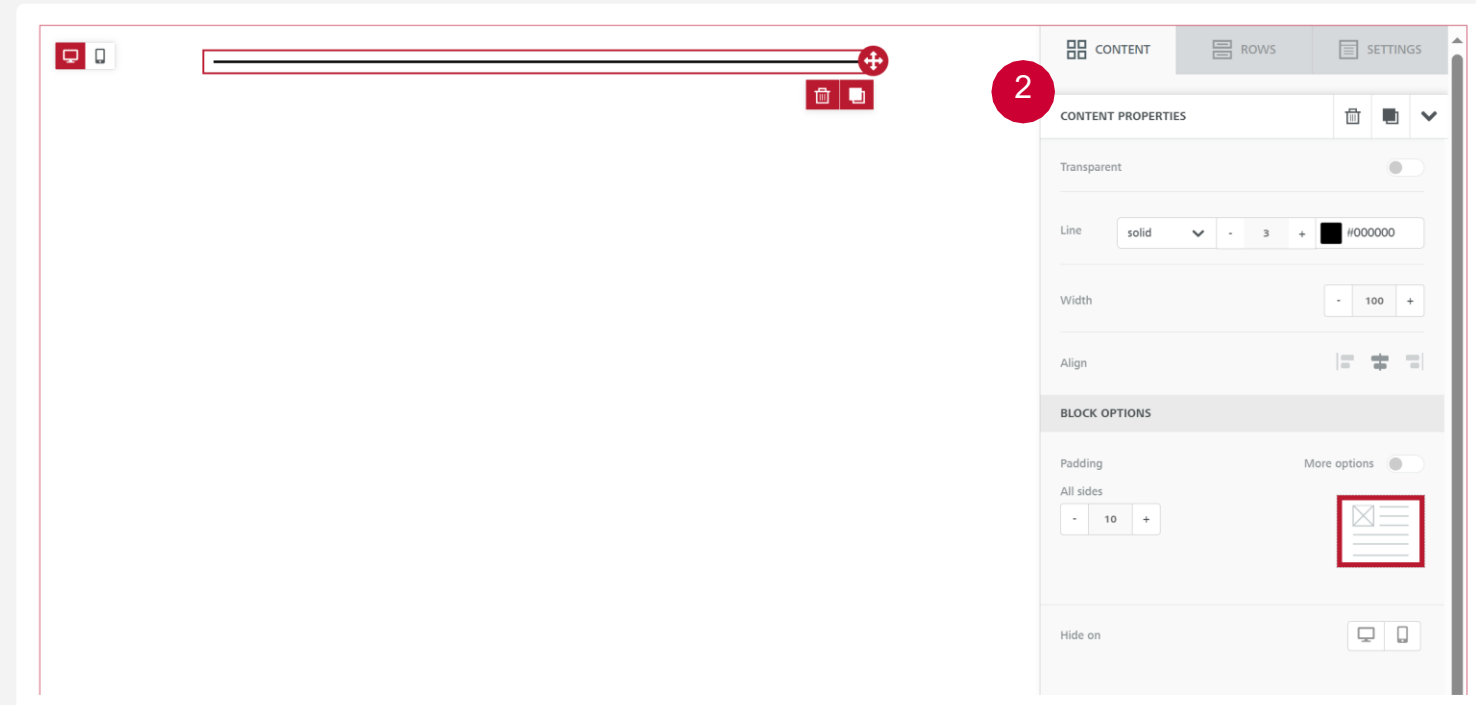
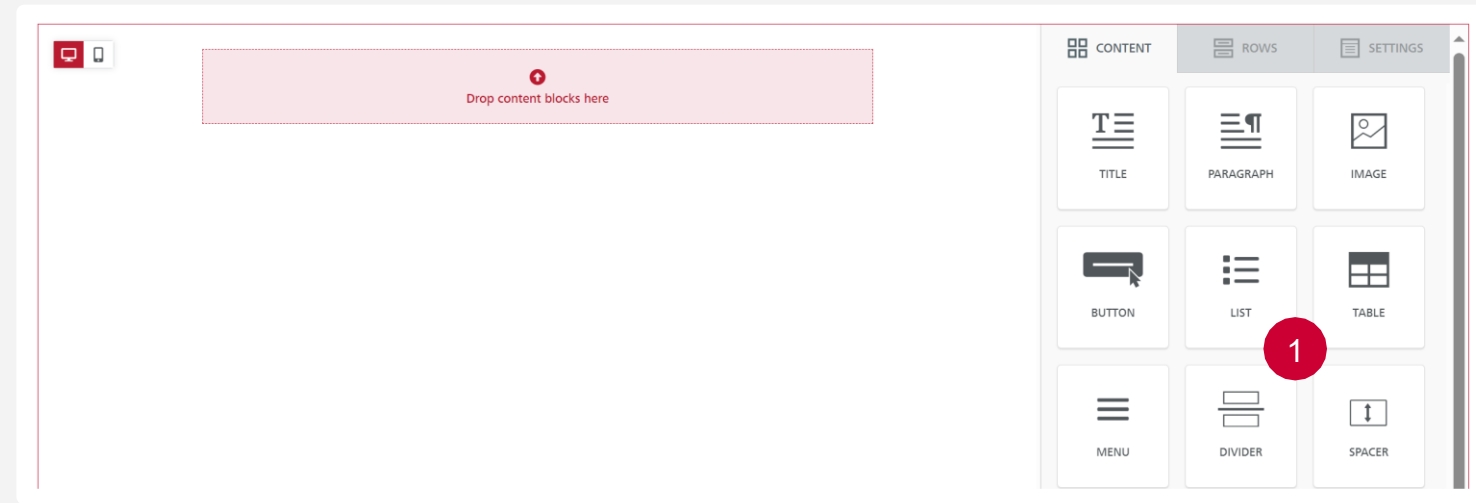
1. You can drag **Menu** into your chosen row.
  2. Within **Content Properties** you can apply items of your choosing, such as:
- Contact information
  - Email information
  - Your website



# Content: Divider

**Divider** allows you to apply a visible break between each article.

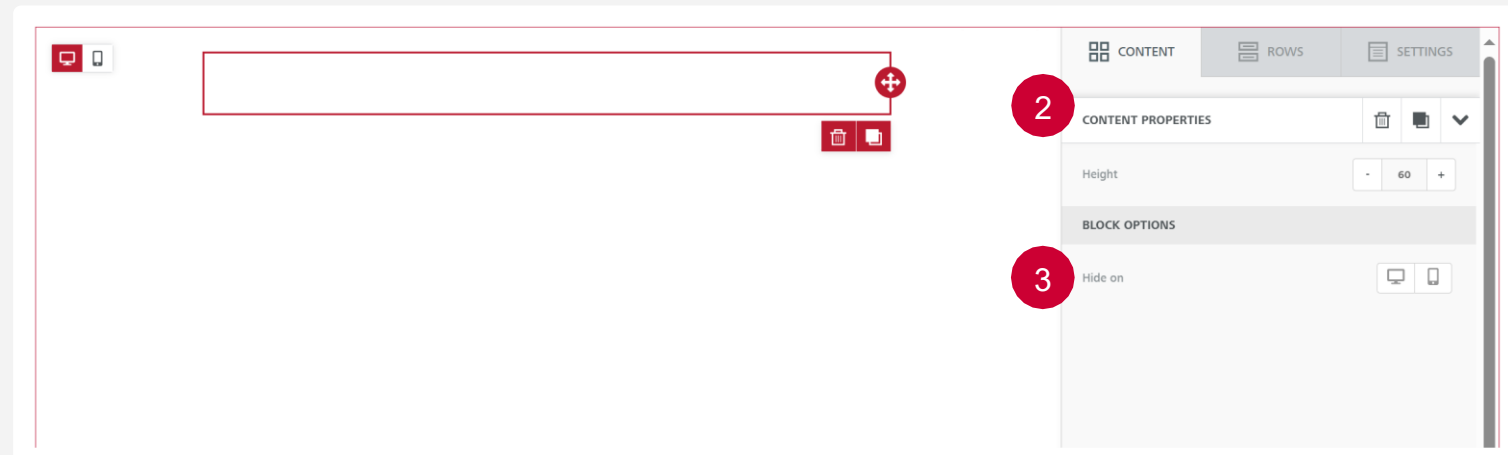
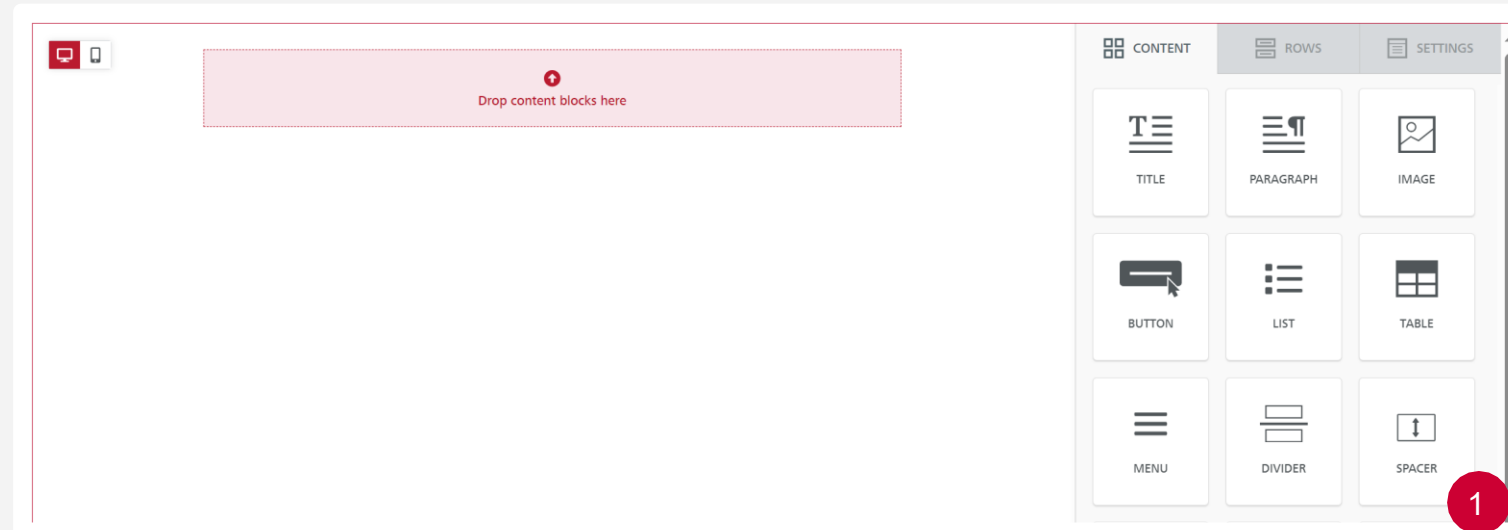
1. You can drag **Divider** into your content to create a **line** between each article.
2. Using **Content Properties**, you can:
  - Change the line from solid to dotted, for example
  - Change the thickness of the divider
  - Change the colour of the divider
  - You can also change the width and padding of the divider



# Content: Spacer

**Spacer** allows you to include a gap between your articles. **Spacer** is slightly different to **Divider** in that the gap presented is not strictly visible.

1. You can drag **Spacer** into your chosen row. This will create a break between the article above and below the spacer.
2. Within **Content Properties** you can apply the height of the space. The standard will be 60, however you can make this smaller and larger.
3. The ability to **hide** on desktop and/or mobile is available – you may feel spacers on mobile views are less necessary.

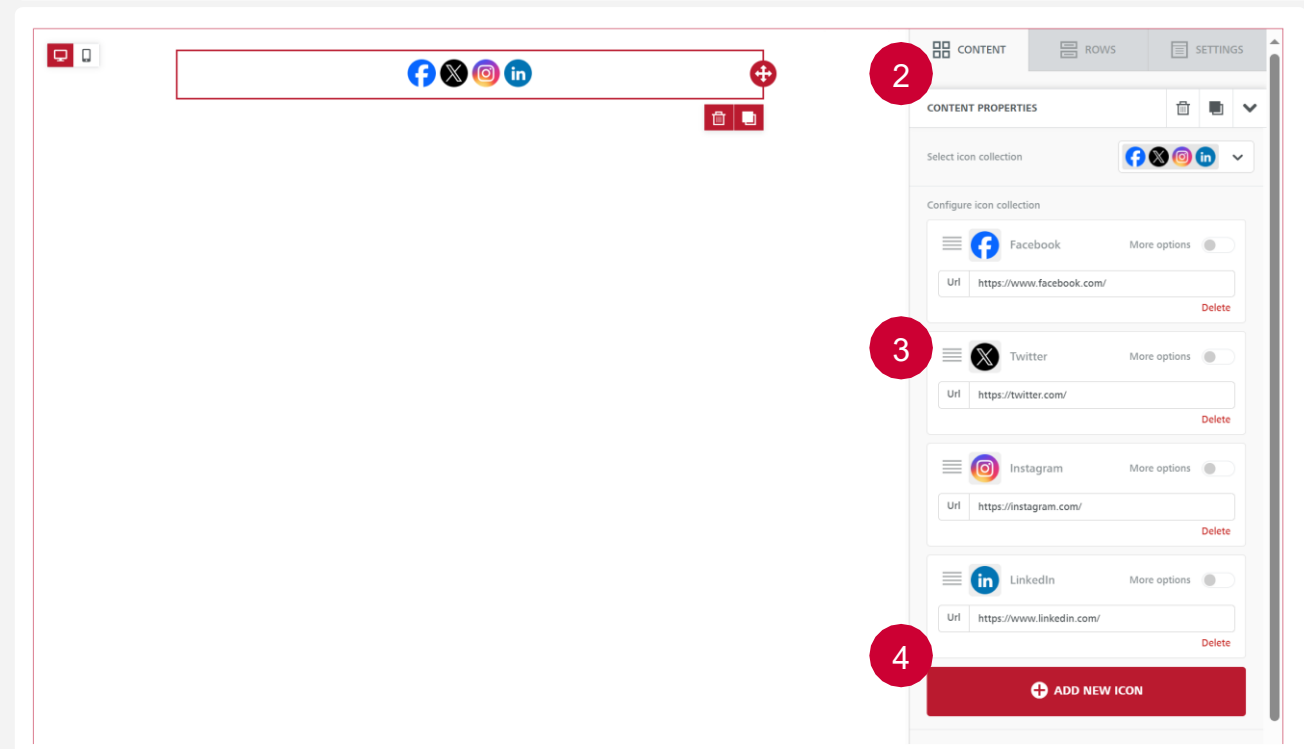
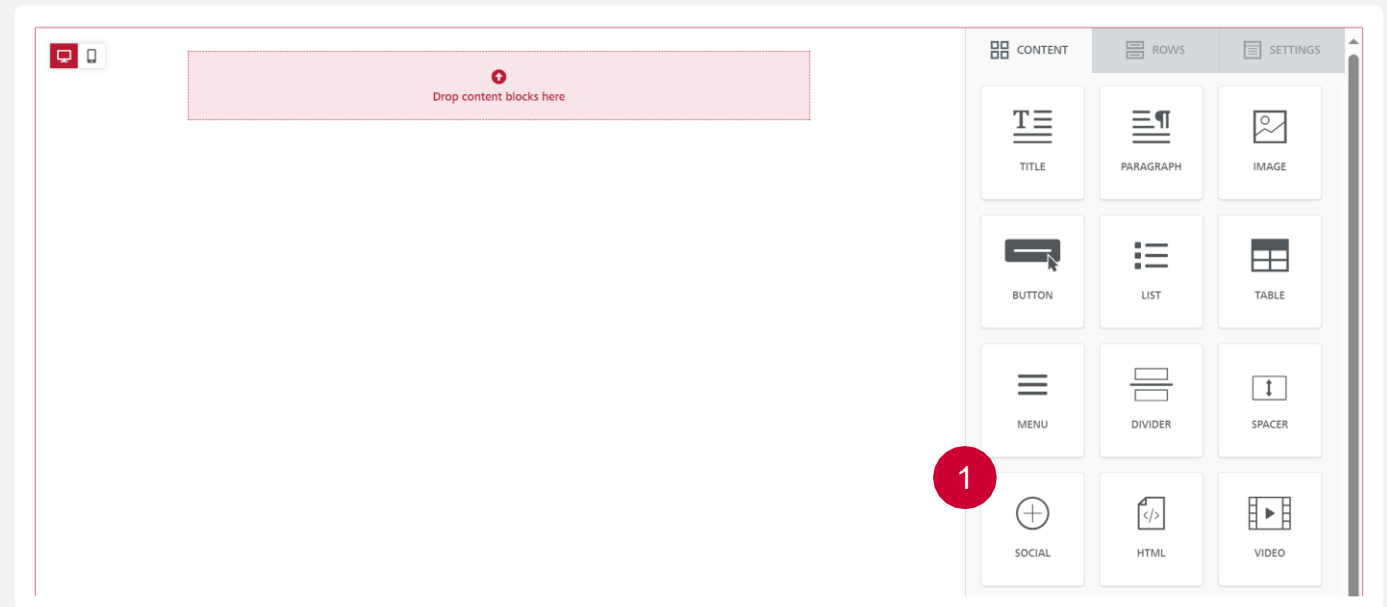


# Content: Social

**Social** allows you to input your all-important social media links.

Social links was something provided automatically in the previous Tractivity mailshot builder. This is now something you can change in all your content moving forwards.

1. You can drag **Social** into your chosen row
2. Within **Content Properties** you can change the style of icons provided.
3. You can apply the relevant URLs which stakeholders can visit once the mailshot has been sent
4. And add additional icons, such as WhatsApp and Email



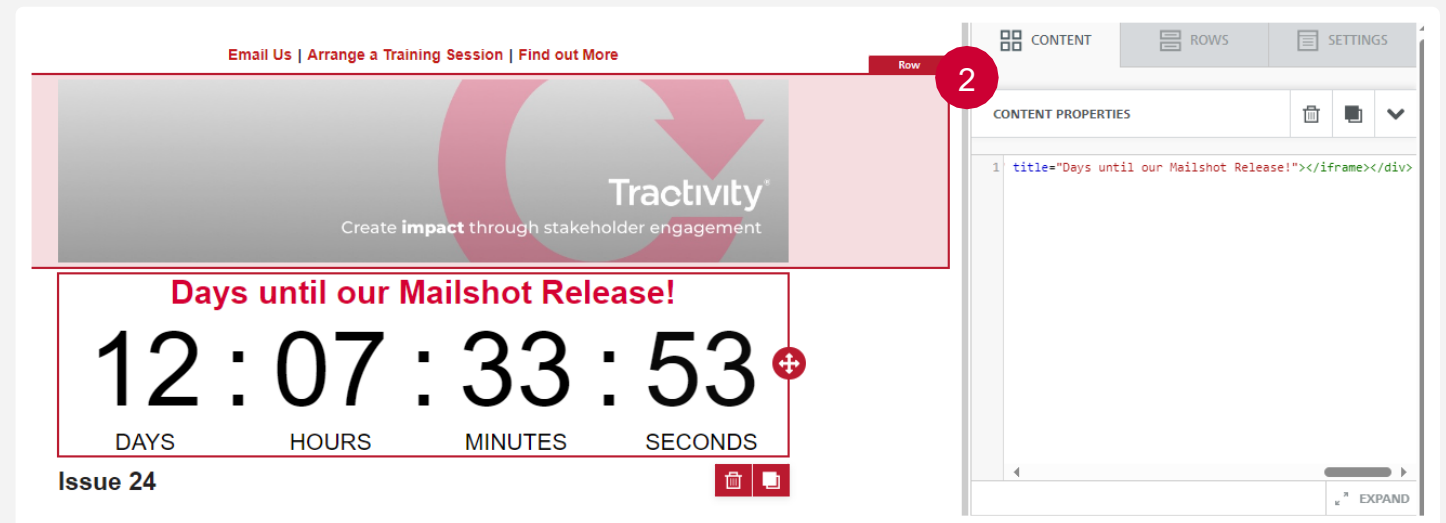
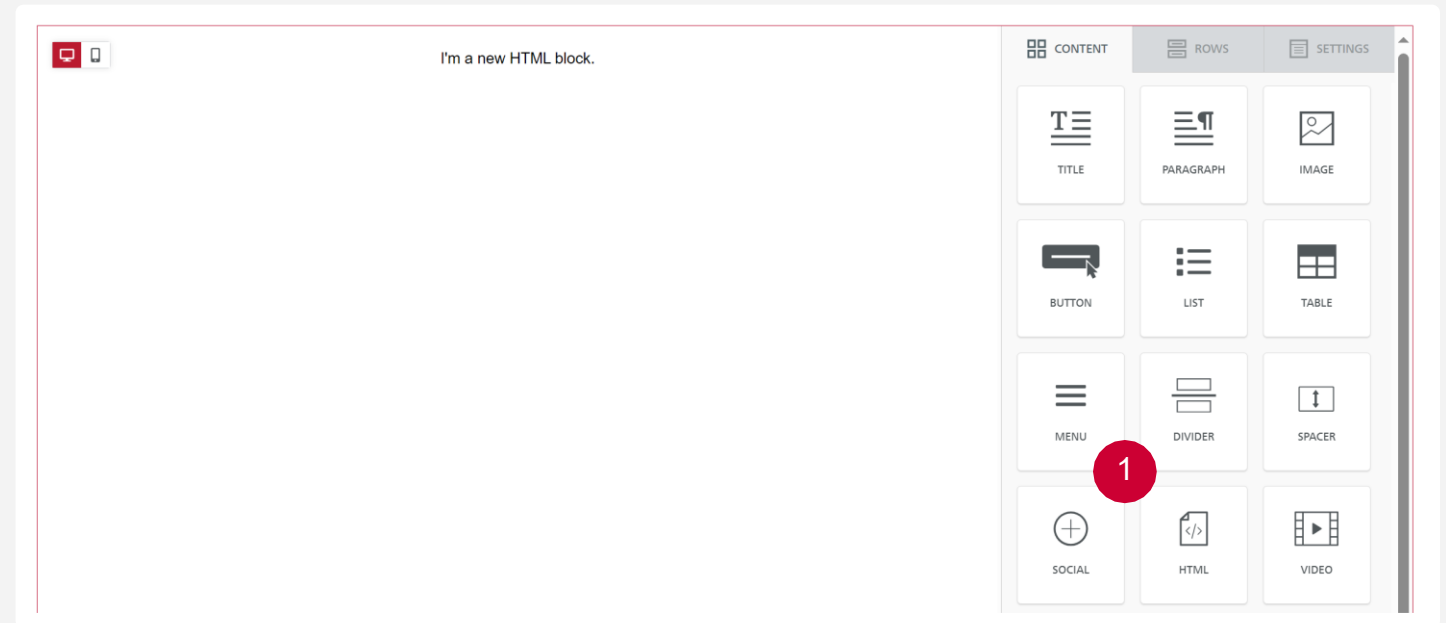
# Content: HTML - Countdowns

**HTML** allows you to enter specific code. For example, if you have an upcoming event you wish to advertise, you can include a dynamic countdown.

## Please note:

You can create a countdown timer, there are many services that you can use for this purpose. [Niftyimages](#) again, but also [Fresh Relevance](#), [CountdownMail](#)

1. Drag a **HTML** blog into your content
2. Once you have created your countdown at the above or another countdown provider, you can **copy and paste** the HTML coded provided into the text box. This will then ensure the countdown is part of your content



# Content: HTML – Anchor (1/3)

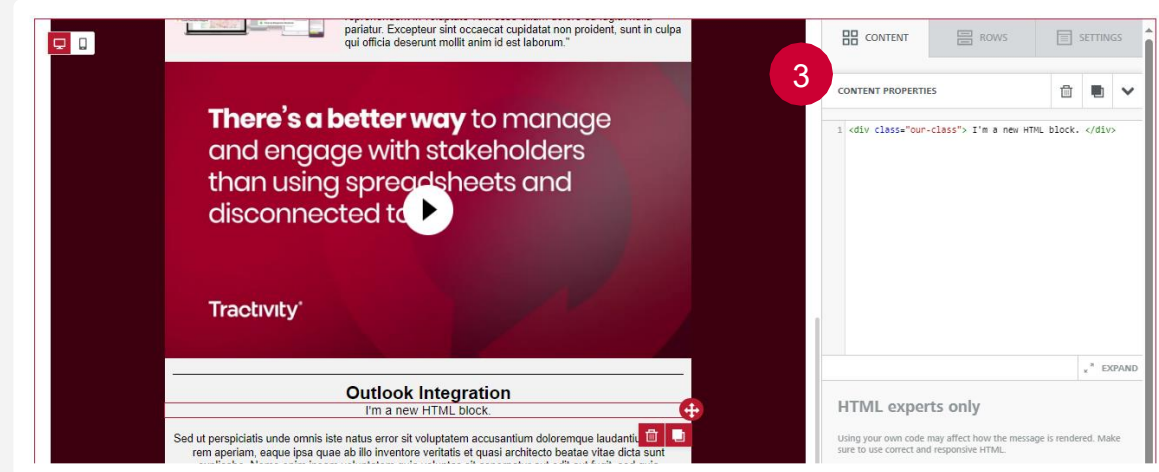
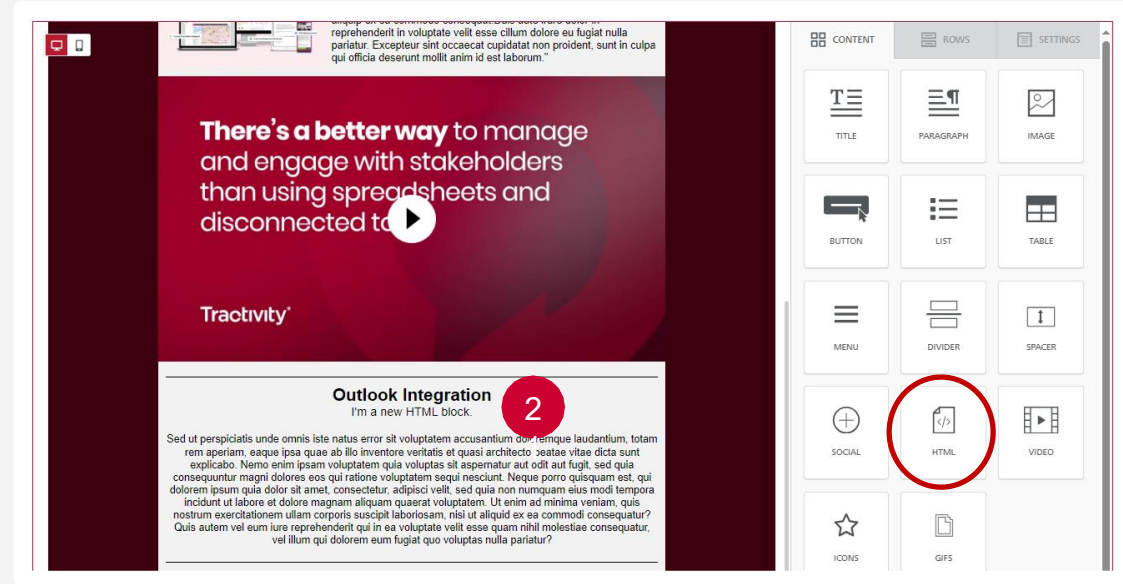
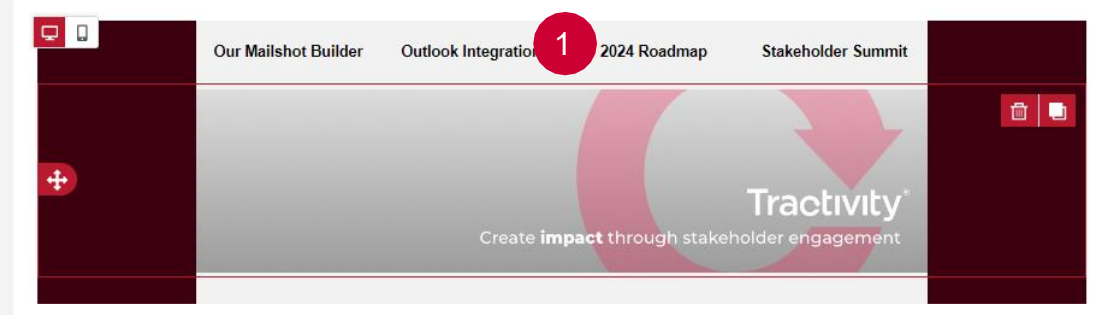
**HTML** allows you to enter specific code.

You can also use **HTML** as an **anchor**. This is very useful when it comes to sending content-heavy mailshots.

1. Select a **content block** that will act as a link to content within in your mailshot
2. Select the area you wish the article to go to when the **above content block** is clicked. Drag a **HTML** content block here.
3. Open the **HTML Content Properties**

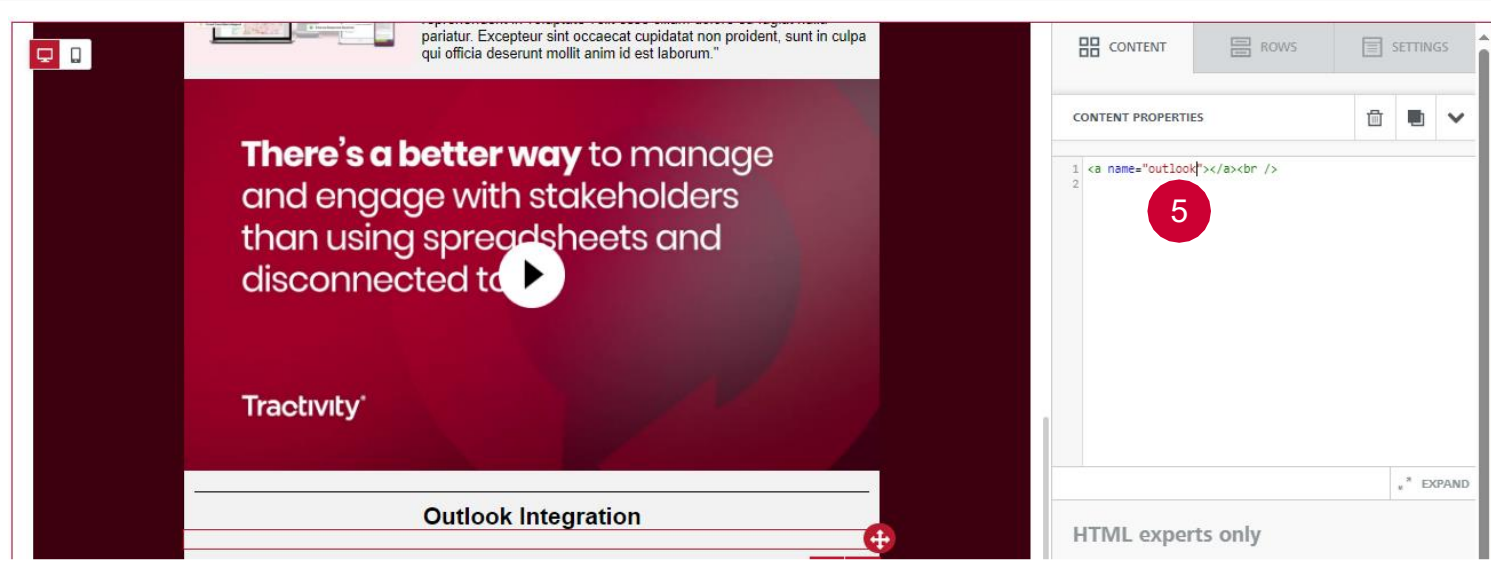
Copy the below code:

```
<a name="tractivity"></a><br />
```



## Content: HTML – Anchor (2/3)

4. Enter the code overleaf into the **HTML code area**
5. Rename the **red** text “tractivity” to the name of the article header. For example: *outlook*



## Content: HTML – Anchor (3/3)

6. Highlight the content block from Step 1 and select **Inset Edit Link**
7. Insert the renamed code into the **URL** option. Please enter # before the rename
8. Untick **Underline Link** if you do not wish to have an underline
9. Set the **Target** to **None** and click **OK**

Once set up, any stakeholders that click the area of the link

The top screenshot shows the Mailshot Builder interface with the 'Outlook Integration' link highlighted in the header. A red circle with the number 6 is placed over the 'Inset Edit Link' button in the toolbar.

The bottom screenshot shows the 'Insert link' dialog box. Red circles with numbers 7, 8, and 9 highlight the following elements:
 

- 7: The 'URL' field containing '#outlook'.
- 8: The 'Underline Link' checkbox, which is checked.
- 9: The 'Target' dropdown menu, which is set to 'None'.

 The 'Text to display' field contains 'Outlook Integration'. The 'Title' field is empty. The 'Cancel' and 'Ok' buttons are at the bottom right.

# Content: Video

**Video** allows you to include recorded media within your content.

**Please note:** only YouTube and Vimeo videos can be used here.

1. You can drag **Video** into your chosen row
2. Within **Content Properties** you can apply the relevant YouTube URL. This will automatically provide a preview image. The image will link to the URL.

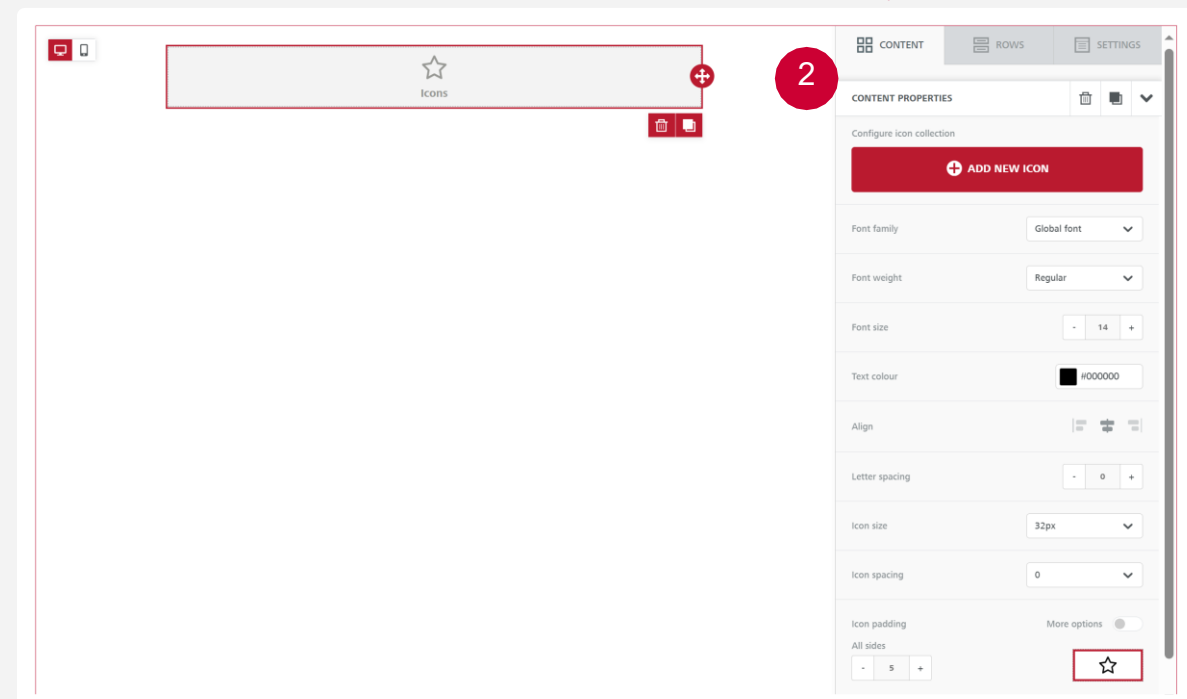
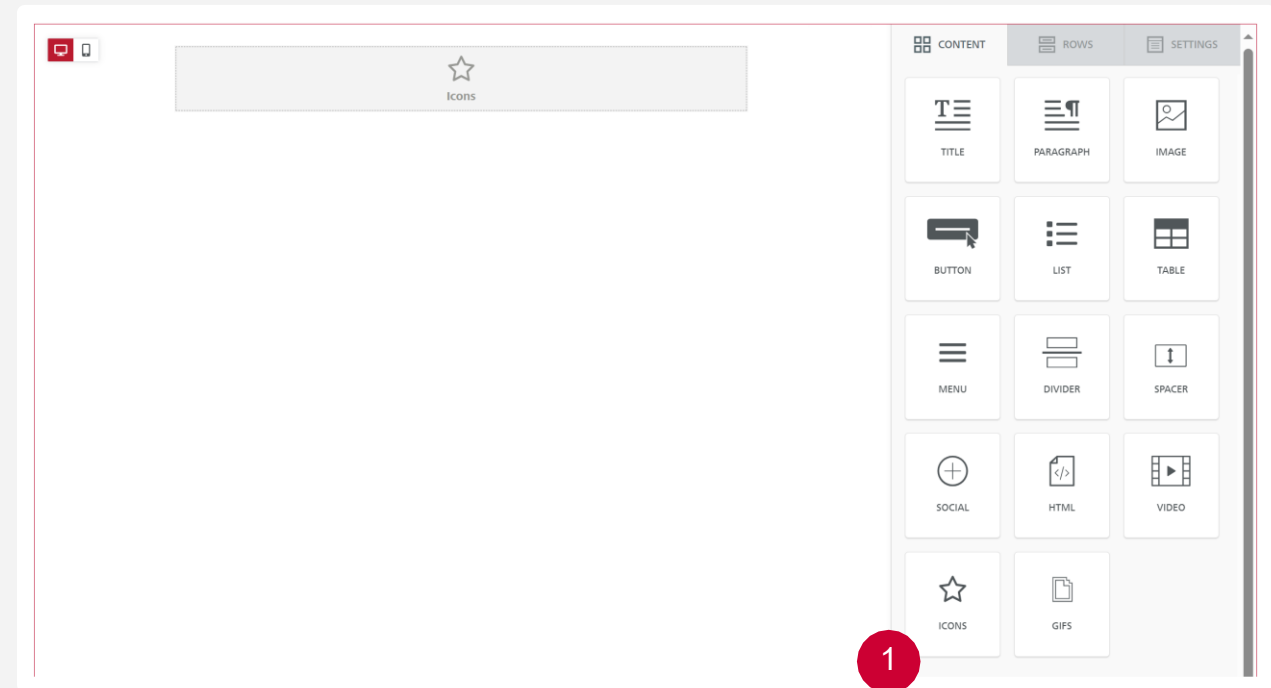
Once the URL has been inserted, you can choose your **play icon type, colour and size**

The screenshot displays a content editor interface with a top navigation bar labeled 'Client Confidential'. The main workspace is divided into a central content area and a right-hand sidebar. The sidebar has three tabs: 'CONTENT', 'ROWS', and 'SETTINGS'. The 'CONTENT' tab is active, showing a grid of content blocks: TITLE, PARAGRAPH, IMAGE, BUTTON, LIST, TABLE, MENU, DIVIDER, SPACER, SOCIAL, HTML, and VIDEO. A red circle with the number '1' highlights the VIDEO block in the grid. The central content area shows a large rectangular placeholder for a video, labeled 'Video' at the bottom center, with a play button icon. A red circle with the number '2' highlights the 'CONTENT PROPERTIES' panel on the right. This panel includes a 'Url' input field, a 'Title' input field, and a 'BLOCK OPTIONS' section with a 'Padding' control (set to 0) and a 'Hide on' section with icons for desktop and mobile views.

# Content: Icons

**Icon** allows you to include symbols of any kind, including emojis.

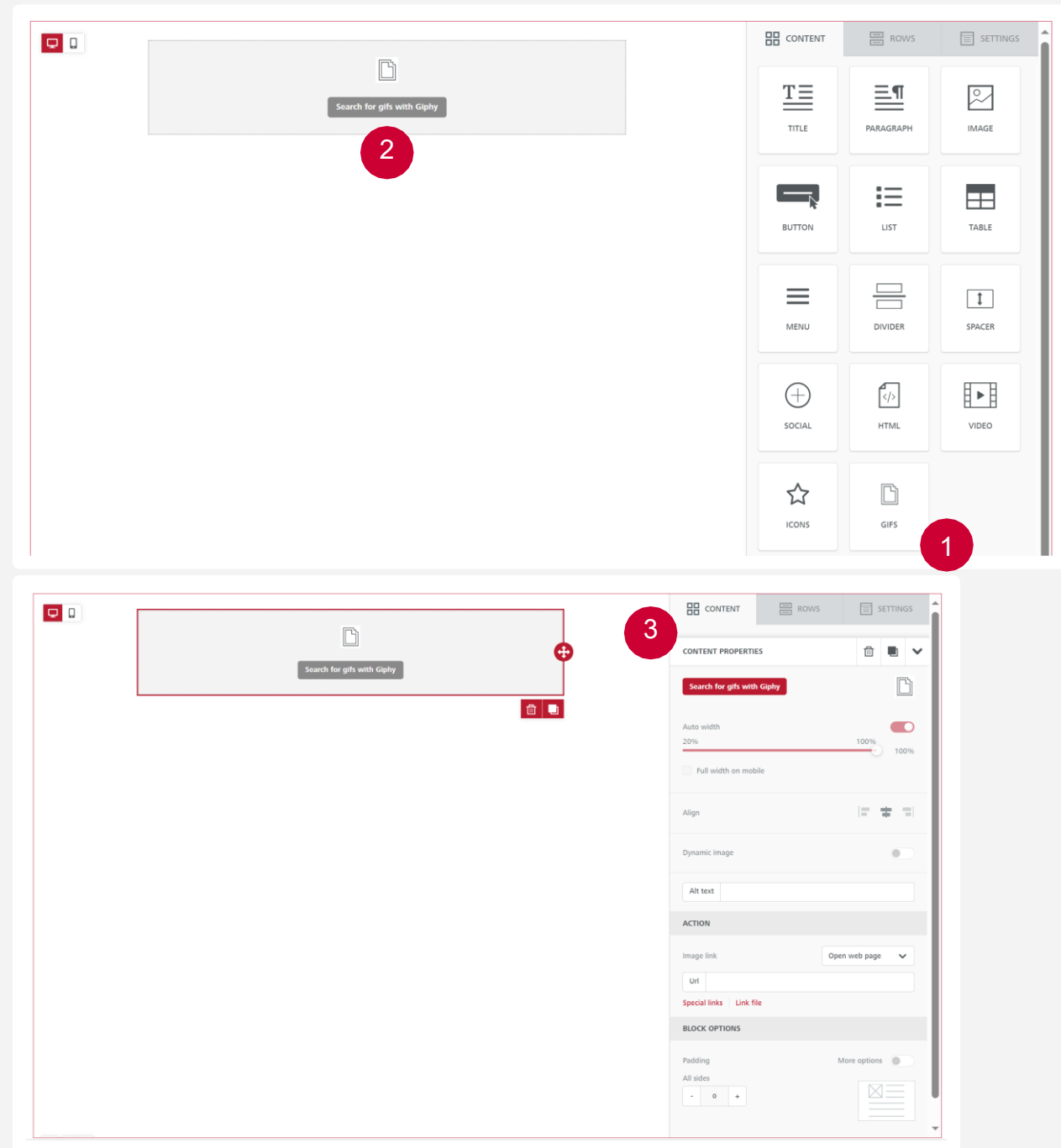
1. You can drag **Icons** into your chosen row
2. Within **Content Properties** you can apply your own icons and change the size via **Icon size** to match any supporting content



# Content: GIFs

**GIFs** allows you to add moving images to your content.

1. Drag the **GIFS** content block into your content
2. Search for GIFS using keywords
3. Once added, you can change sizes and padding to better suit your content.

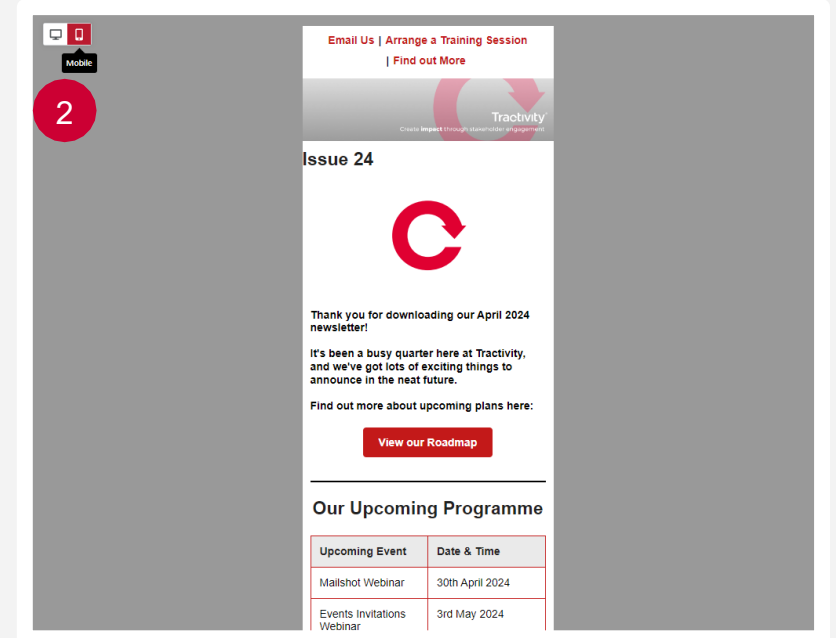
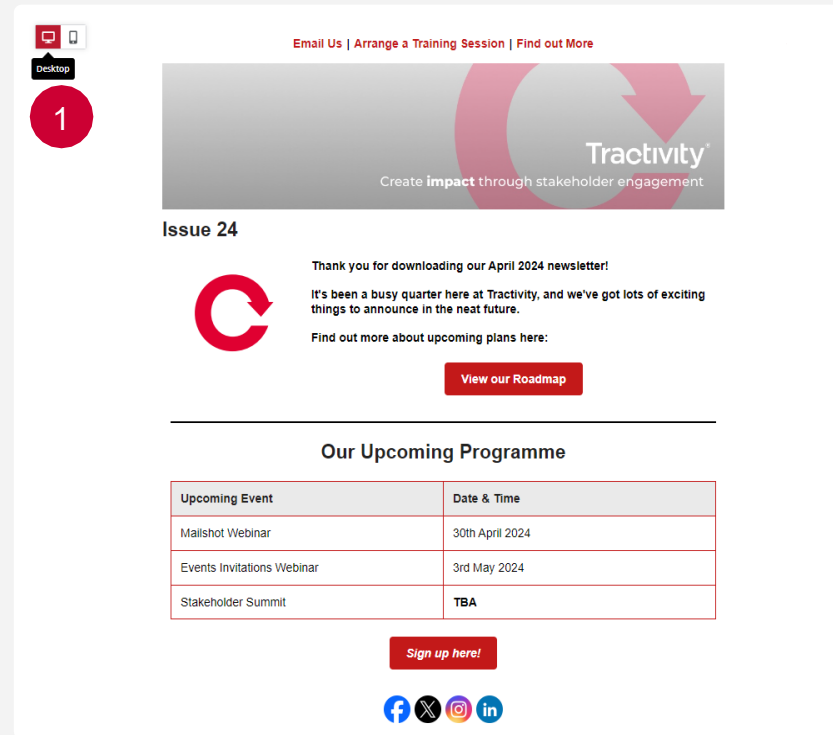


# Desktop/Mobile View

Different viewing options (**desktop** and **mobile**) gives you an indication as to how your content will appear if viewed on either devices.

In the top right-hand corner, you will see this icon (pictured opposite)

1. You can toggle you view between **desktop**
2. As well as **mobile**



# Desktop/Mobile: Hiding Content

When adding **Content** of any kind, you will have the ability to hide content on either a **Desktop** or **Mobile** device.

1. Select the piece of **Content** you wish to hide.
2. Go to **Content Properties** on the right-hand side and scroll to the bottom of all options.
3. You will see the final option: **Hide on**. Selecting either of the two options will **blur** the content and will not be visible in the view you select once sent to recipients.
4. You will see a new icon: **Visibility ON** to indicate there are hidden elements within the mailshot.

The screenshot displays the Tractivity newsletter editor. At the top, there's a header with the Tractivity logo and the tagline "Create **impact** through stakeholder engagement". Below this is a section titled "Issue 24" with a circular arrow icon and a thank you message for the April 2024 newsletter. A "View our Roadmap" button is present. The main section is titled "Our Upcoming Programme" and contains a table of events.

Upcoming Event	Date & Time
Mailshot Webinar	30th April 2024
Events Invitations Webinar	3rd May 2024
Stakeholder Summit	TBA

Below the table is a "Sign up here!" button and social media icons for Facebook, X, Instagram, and LinkedIn. At the bottom, there are two dashed boxes with red plus icons, indicating hidden content.

On the right side, the "CONTENT PROPERTIES" panel is open, showing various styling options like font weight, size, color, and alignment. At the bottom of this panel, the "BLOCK OPTIONS" section is visible, featuring a "Hide on" toggle with icons for desktop and mobile devices. A red circle highlights the "Hide on" option.

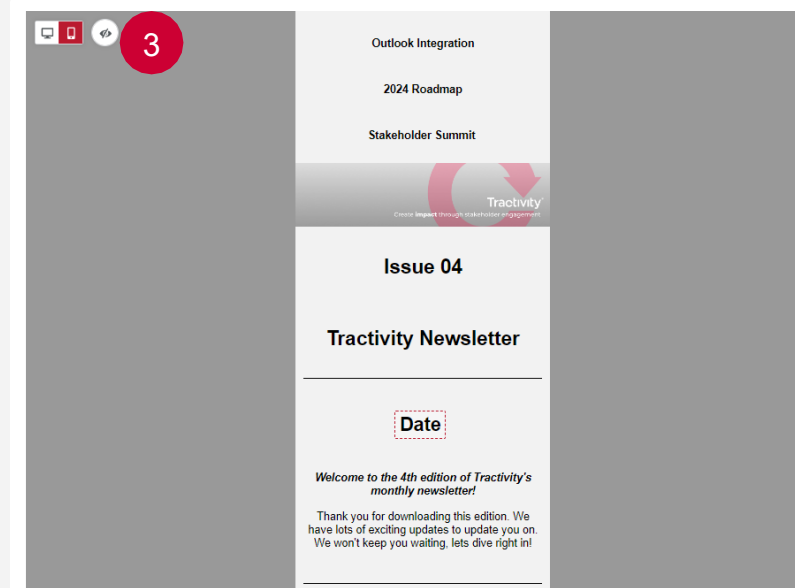
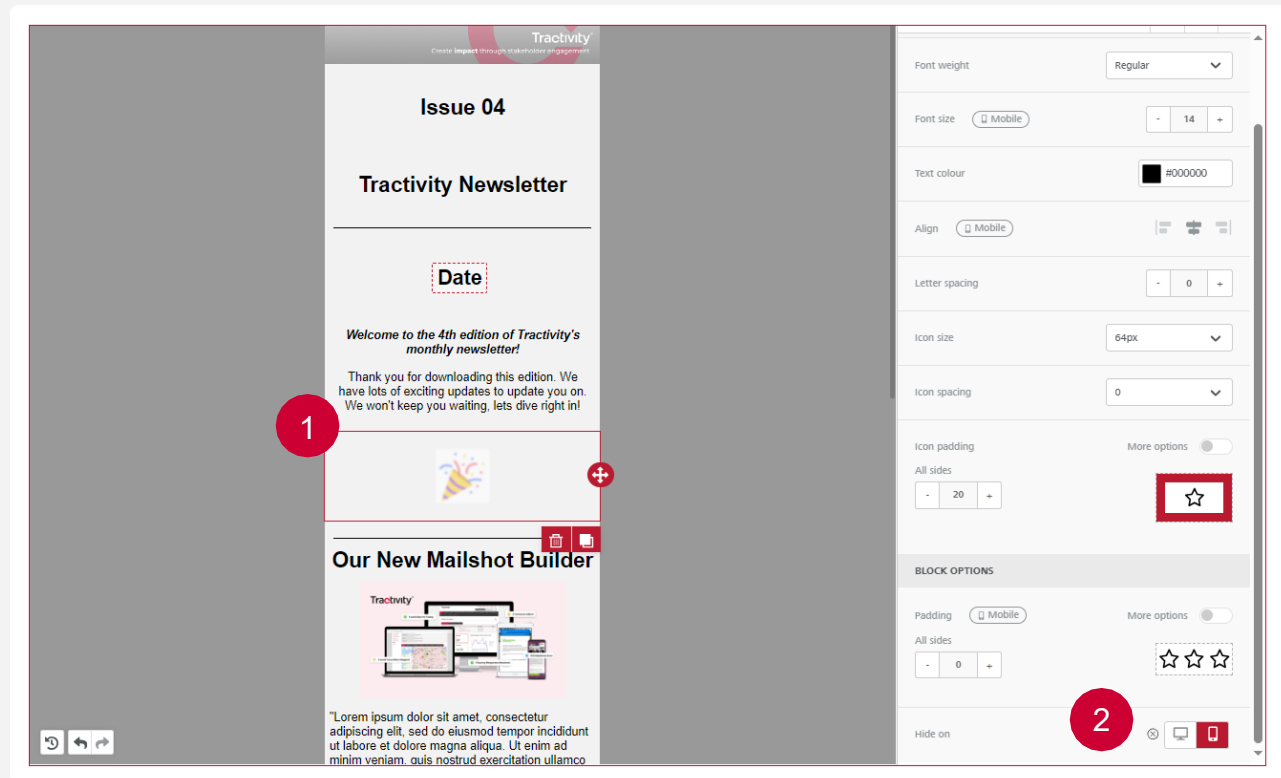
Numbered callouts indicate the steps: 1 points to the "Our Upcoming Programme" section, 2 points to the "CONTENT PROPERTIES" panel, 3 points to the "Hide on" toggle, and 4 points to the "Visibility ON" icon in the top left corner of the editor.

# Desktop/Mobile: Moving Content Separately (1/2)

Different viewing options means some content might be best placed differently on devices.

As you can hide certain content, **You can have certain content blocks in one place on desktop and somewhere else on mobile, and vice versa.**

1. Choose **content block**
2. Within **Content Properties**, click **hide on mobile** (this will then appear blurred)
3. Switch **Visibility OFF** (the content will no longer be blurred; **it won't be visible at all**)



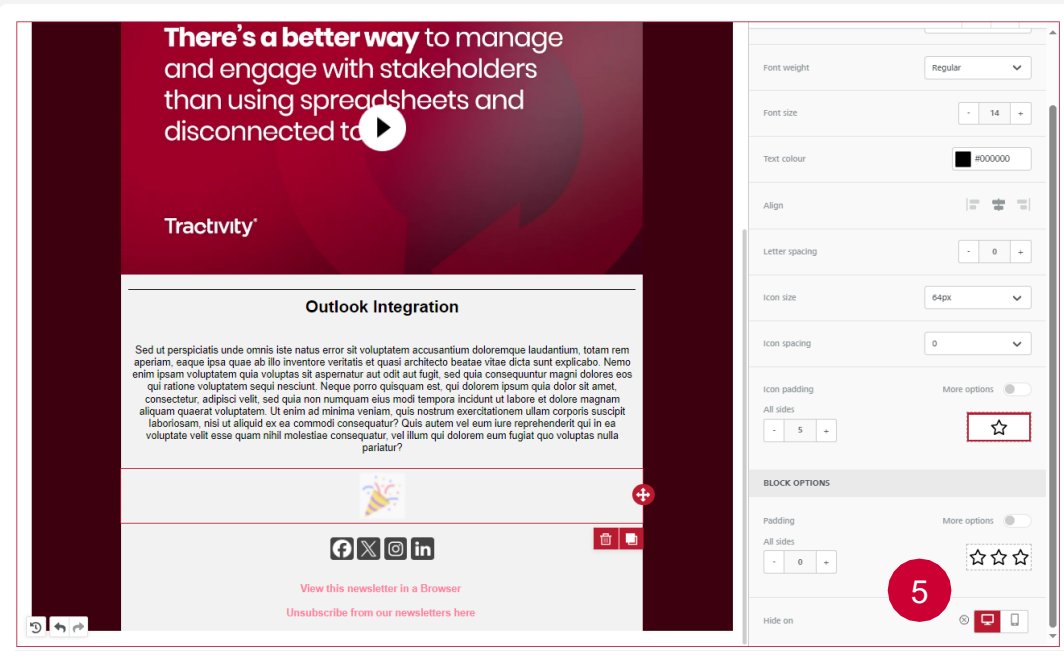
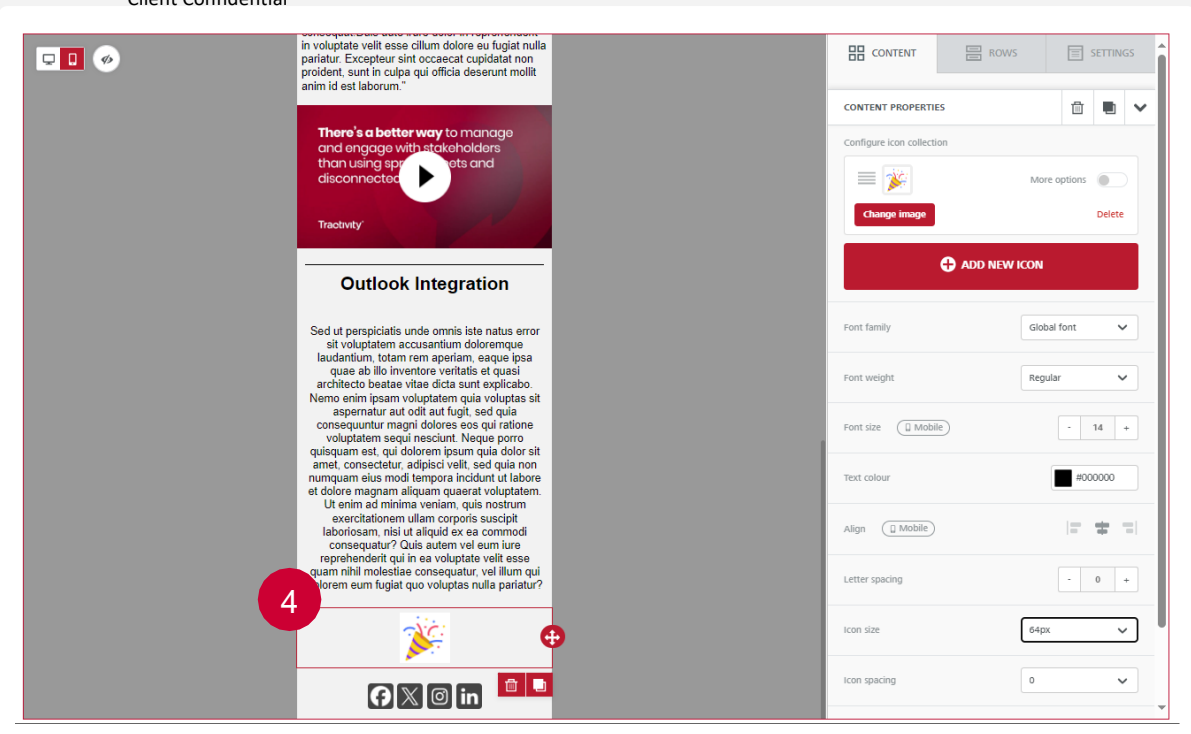
# Desktop/Mobile: Moving Content Separately (2/2)

4. Add a row on mobile and add content
  5. Hide the content created in step 4 on Desktop
- ## Desktop

The content will then be in one place on **desktop** and somewhere else on **mobile**

(Please note the above steps can be done **vice versa**!)

Client Confidential



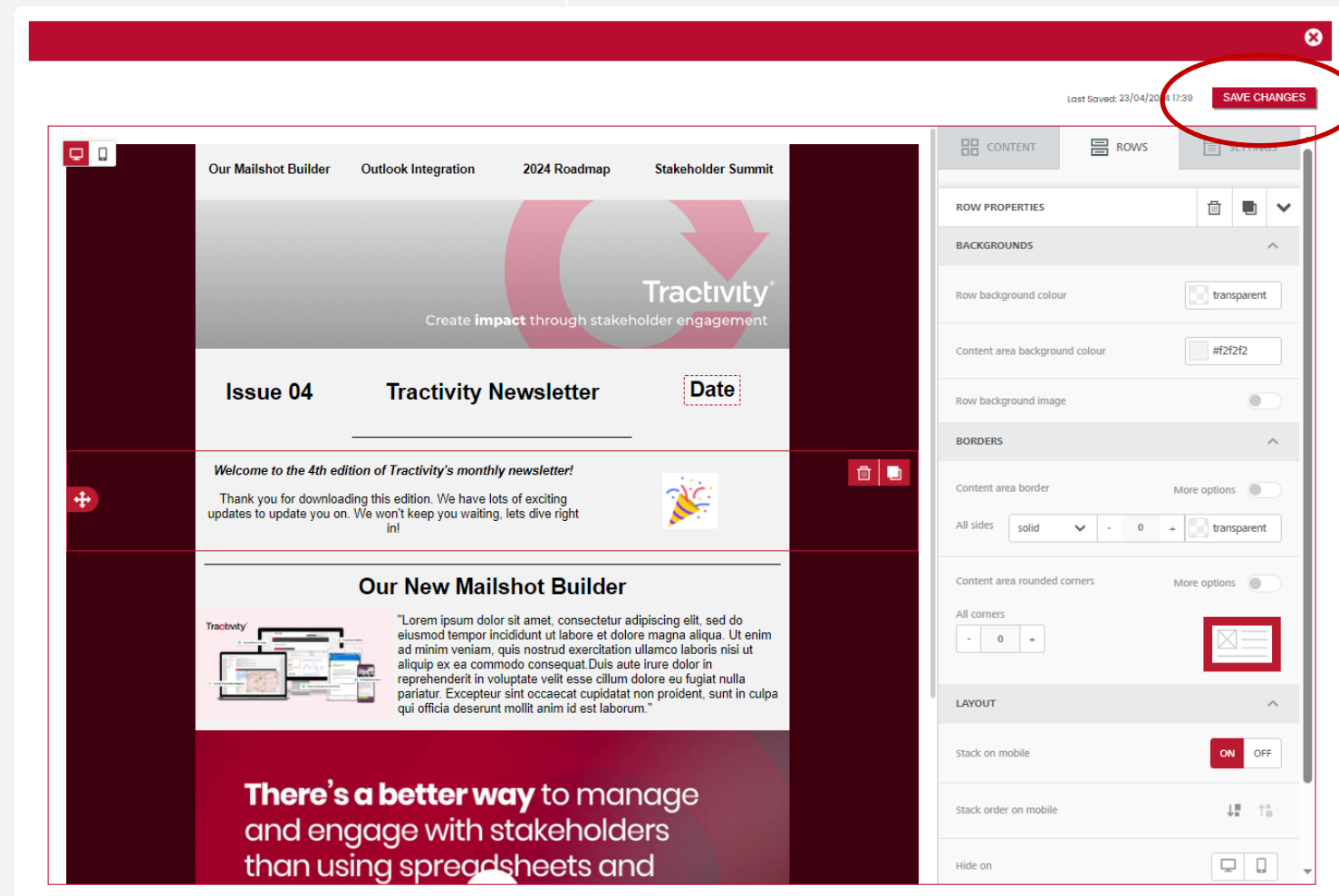
# Saving Changes

As you continue to build your mailshot, you will have the ability to save this as you go. This way, you don't have to worry about losing any progress.

Simply click **Save Changes** which will appear in the top right-hand corner of your mailshot builder.

## Please note:

We recommend only 1 person actively edits a mailshot within the builder at any one time. The builder will only retain the most recent save, therefore if two people are working on the same mailshot simultaneously, some changes **will not be saved**.

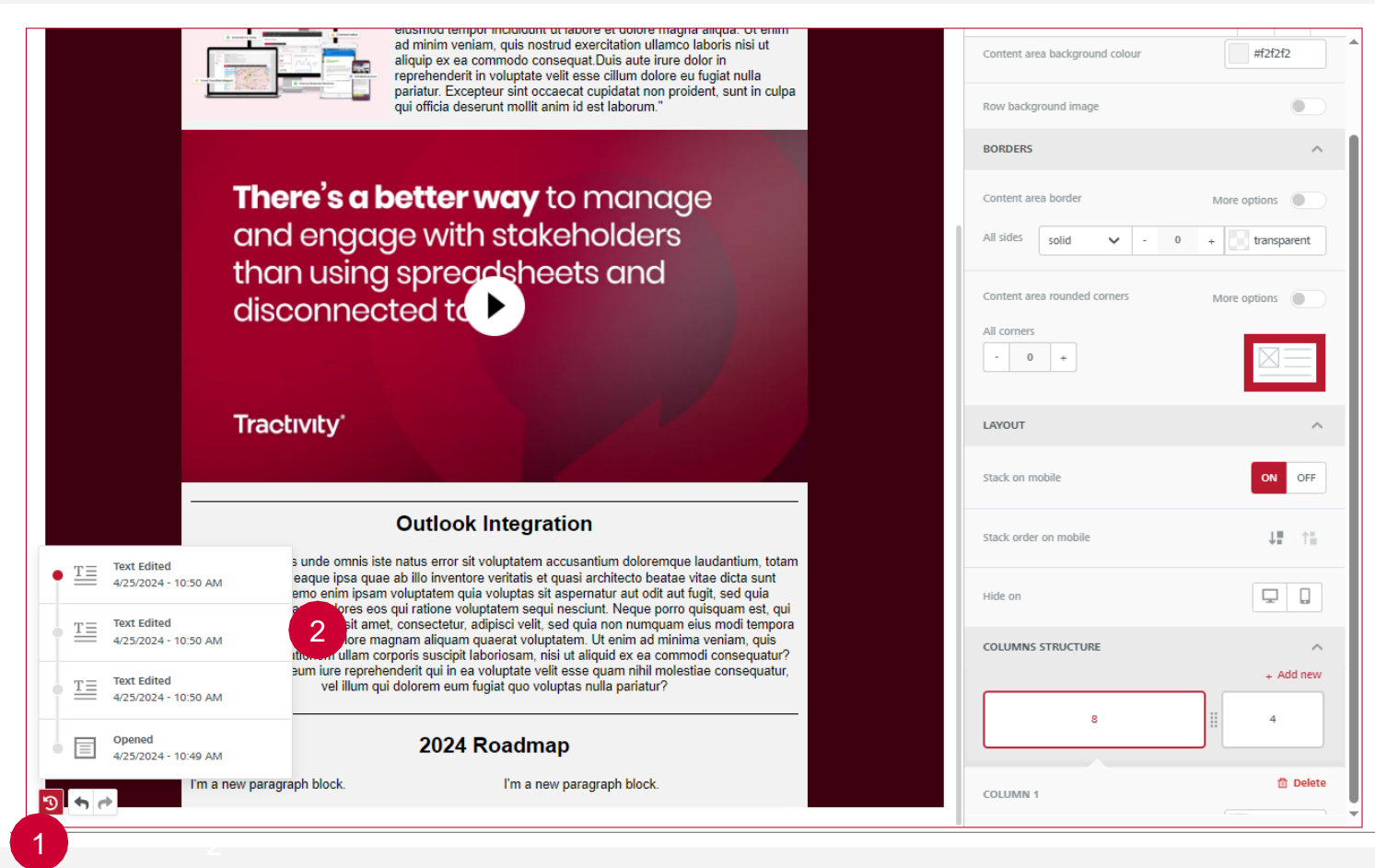


# Previous Version

**Previous Version** can help when it comes to any mistakes you make. You can skip back to before you made errors.

To find this option, scroll to the bottom left-hand side of the builder

1. In the left-hand corner you will see this icon (picture across the page). Click this to view the different stages
2. Select the relevant stage you wish to revert to and continue to edit your mailshot

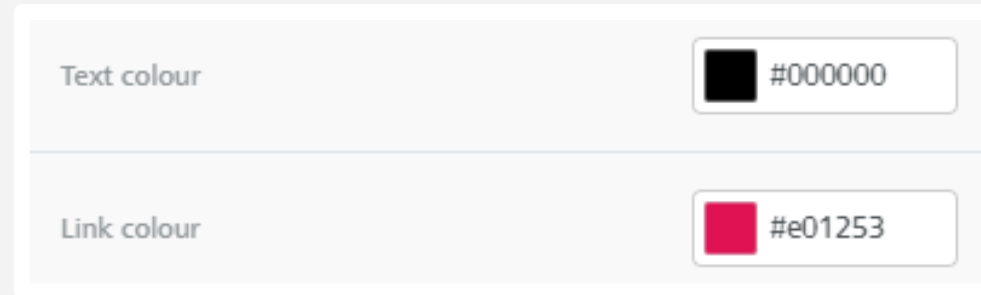


# Client Branding



Please ensure you have your brand guidelines to hand when creating a mailshot inside our new builder.

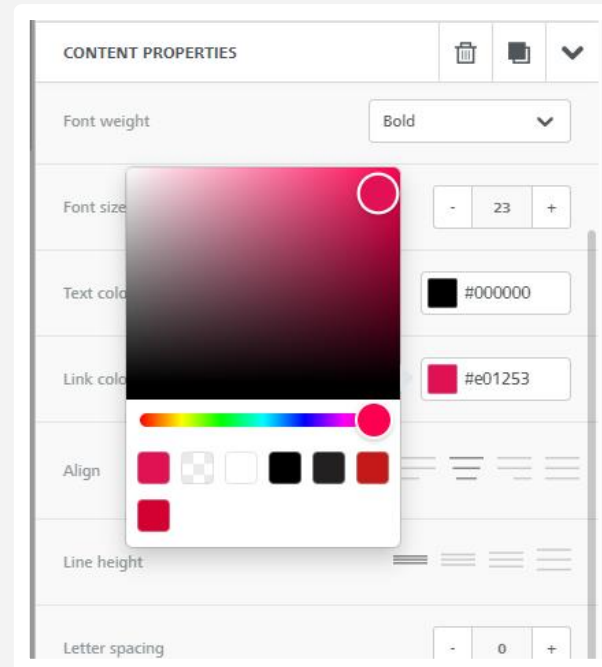
Previously, you provided Tractivity with your branded colours. This is no longer the case, and you can input HEX codes within **Content Properties** of the text/colours you wish to apply to your mailshot.

**Within Settings you can set a default font, so this is consistent across your mailshot.**



This panel shows two color selection fields. The first is labeled 'Text colour' and has a black color swatch with the hex code '#000000'. The second is labeled 'Link colour' and has a red color swatch with the hex code '#e01253'.

Text colour	 #000000
Link colour	 #e01253



This panel shows various text formatting options. A color picker overlay is visible, showing a gradient from red to purple. The panel includes fields for Font weight (set to Bold), Font size (set to 23), Text colour (black, #000000), Link colour (red, #e01253), Align (left), Line height, and Letter spacing (set to 0).

CONTENT PROPERTIES

Font weight: Bold

Font size: 23

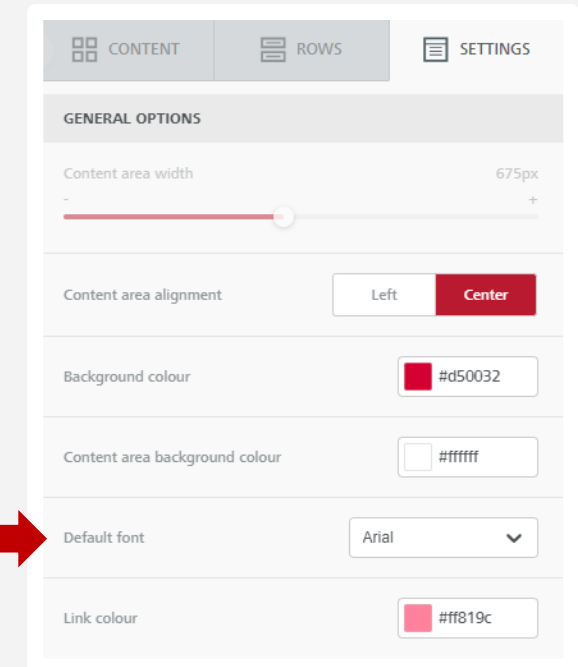
Text colour: #000000

Link colour: #e01253

Align: Left

Line height: [unselected]

Letter spacing: 0



This panel shows general options for the mailshot. It includes a slider for Content area width (set to 675px), Content area alignment (set to Center), Background colour (red, #d50032), Content area background colour (white, #ffffff), Default font (set to Arial), and Link colour (red, #ff819c).

CONTENT | ROWS | SETTINGS

GENERAL OPTIONS

Content area width: 675px

Content area alignment: Left | Center

Background colour: #d50032

Content area background colour: #ffffff

Default font: Arial

Link colour: #ff819c

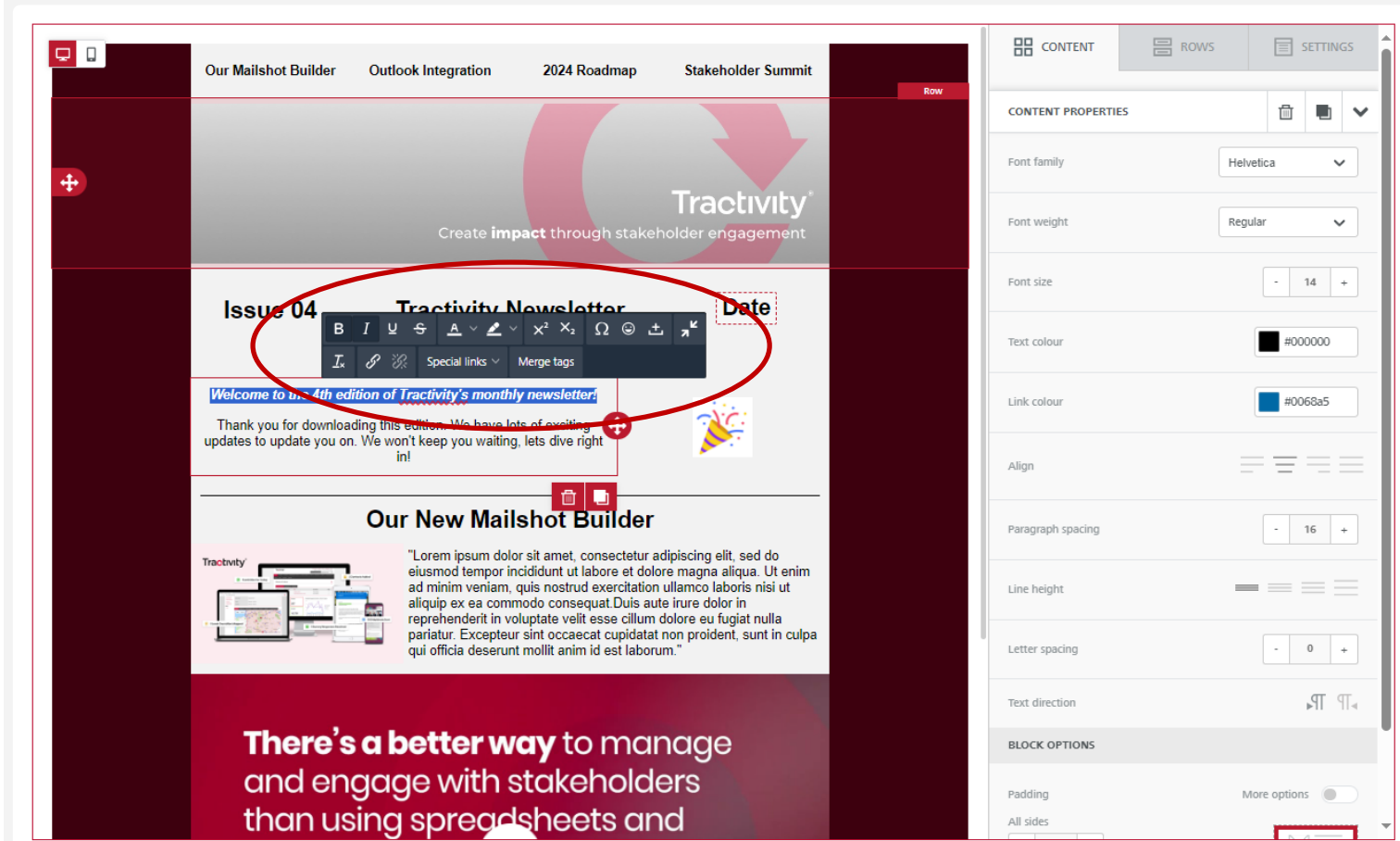
# Special Links: Overview

**Special Links** allows you to include specific links. This is slightly different to the **Button** content feature.

You will be able to access **Special Links** within a **Title** and/or **Paragraph** block so you can insert links where appropriate.

There are three types of **Special Links** which are better defined over the following three pages. These are:

1. **Special Links: Body**
2. **Special Links: Footer**



# Special Links: Body

**Special Links: Body** is used to ensure your mailshot content can be **Viewed in a Browser**.

Some of your stakeholders may have additional security on their devices, and therefore images cannot be downloaded. If imagery is an important aspect of your content, they can click **View in Browser** to see all the information in your mailshot.

The stakeholder's default browser will display the content you have sent.

1. To add the **View in Browser** option, highlight your preferred text, click **Special links > Body > View in Browser**.

**View in Browser** will then be inserted into the content block of your choice.

1

The screenshot displays the Tractivity email editor. The main canvas shows a dark red header with the text "There's a better way to manage and engage with stakeholders than using spreadsheets and disconnected to" and a play button icon. Below this is a section titled "Outlook Integration" with a paragraph of placeholder text. Further down is a section titled "2024 Roadmap" with the text "I'm a new paragraph block". A context menu is open over the "2024 Roadmap" text, showing options like "Body", "Footer", "Events", "Special links", and "Merge tags". The "Special links" option is selected, and a sub-menu is visible with "View in Browser" highlighted. A red circle with the number "1" is placed over the "View in Browser" option. The right sidebar contains various formatting options such as "Font family", "Font weight", "Font size", "Text colour", "Link colour", "Align", "Paragraph spacing", "Line height", "Letter spacing", "Text direction", and "BLOCK OPTIONS". The "BLOCK OPTIONS" section includes "Padding" and "All sides" settings. At the bottom right, there is a red plus icon and a red box highlighting a "View in Browser" link in the footer area.

# Special Links: Footer

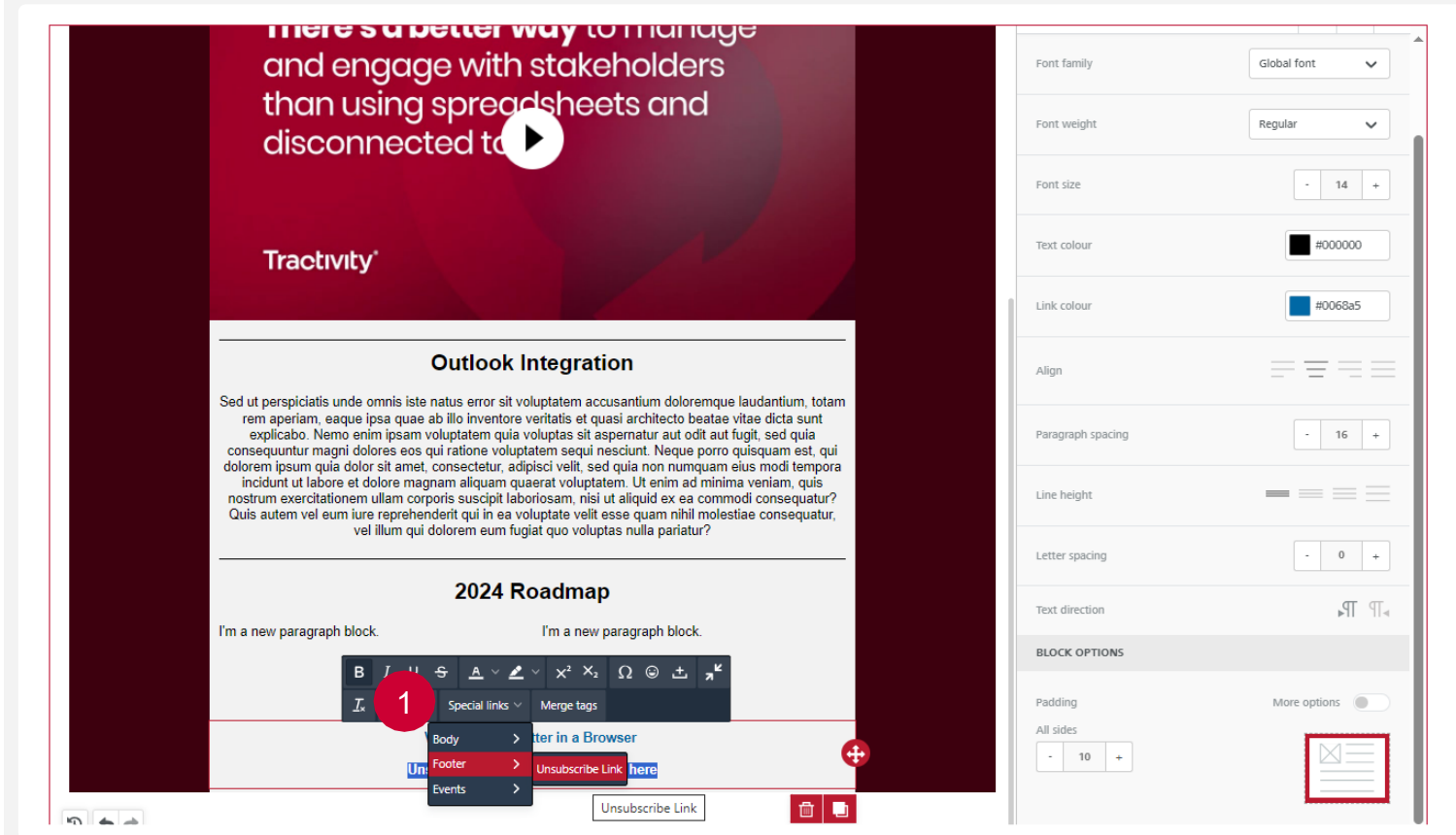
**Special Links: Footer** allows you to insert an **Unsubscribe Link** to your mailshot.

To be GDPR compliant, you may find it necessary to include an Unsubscribe link. If a stakeholder clicks this option, their Tractivity record will be automatically updated to **Unsubscribed**.

**They will no longer receive mailshot communications unless they opt to change this later.**

1. To add the **Unsubscribe Link** option, highlight your text, click **Special links > Footer > Unsubscribe Link**

**Unsubscribe** will then be inserted into the content block of your choice. Typically, this is entered in the footer of communications, but you can have this elsewhere, or not at all.



# Merge Field

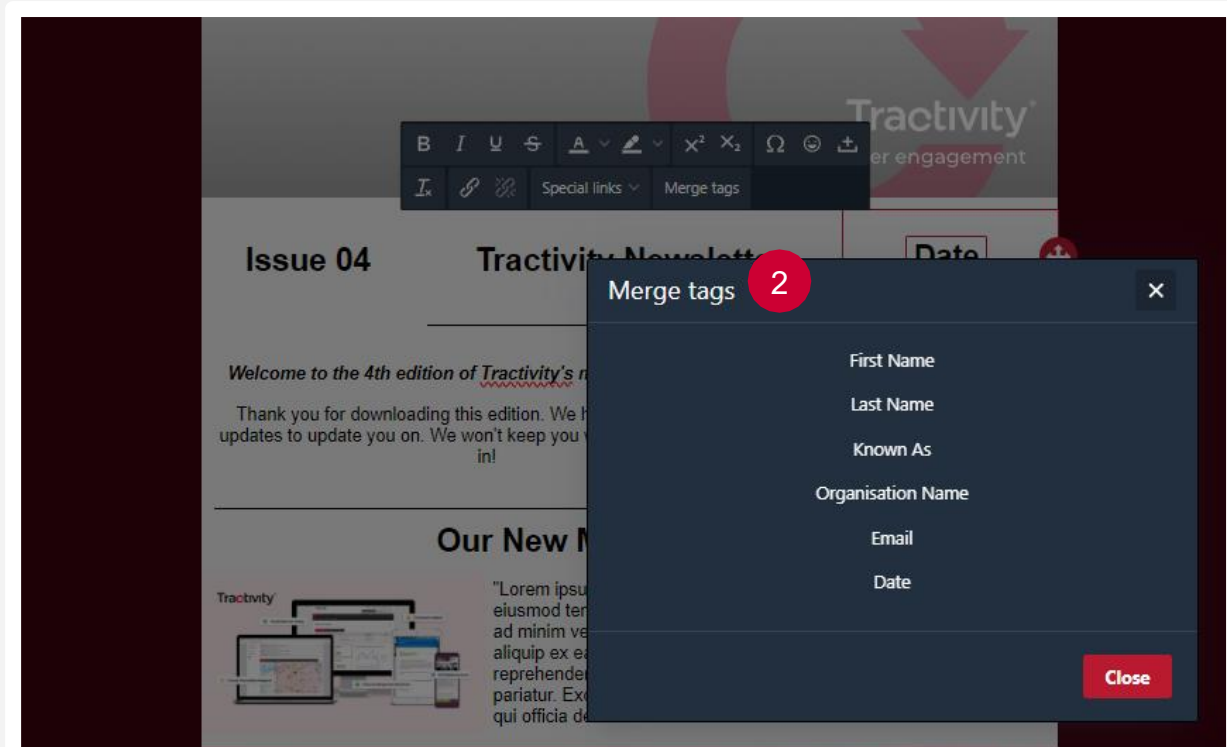
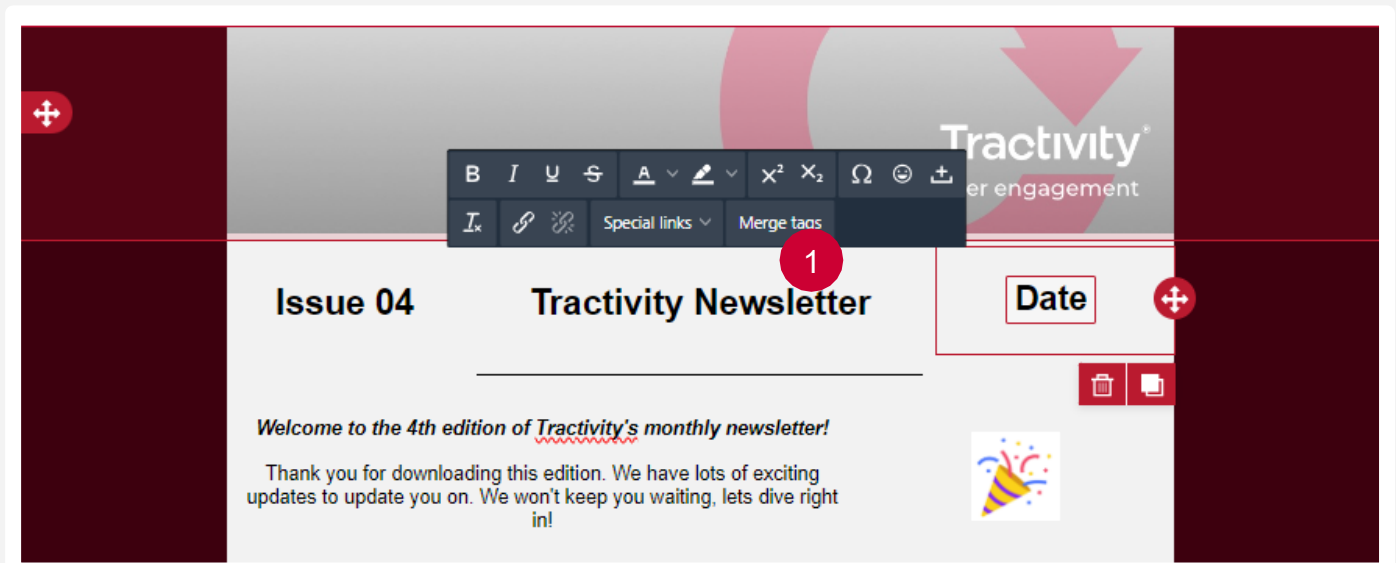
**Merge Field** means you can address your recipients personally.

1. The **Merge Field** will use the Contact information stored within Tractivity.

2. The fields you can use are:

- **First Name**
- **Last Name**
- **Known As**
- **Organisation Name**
- **Email**
- **Date**

**Merge Field** can be used within a **title** and/or **paragraph** block. Select **Merge tags** and select **the appropriate tag** to insert it into your content.



# Send Mailshot Test

Once you're happy with your mailshot, you can **Send a Test**.

You **must** send a test either to yourself or a colleague before sending/scheduling the mailshot to all intended recipients.

1. In the **View Mailshot** screen, down the left-hand menu click **Send Test**
2. In the **Send Test** screen, complete the required information so the mailshot is sent using any mail merge fields you have set up
3. Click **Send Test** – this will arrive in the inbox of the email entered to the **Test Email Address** field

## SmartMailer: View Mailshot

### Display:

- All Mailshots
- My Mailshots

### Mailshots:

- New Mailshot
- View Mailshot
- Edit Mailshot
- Send Test
- Copy Mailshot

### Templates:

- All Templates
- New Template

Title	Kate Test Mailshot
Description	Test
Subject	Test
From Name	Kate
Reply-To Email Address	Kate.martin@tractivity.co.uk
Include HTML Link	True
Priority	Normal
Status	Draft
Owner Teams	Training Project (Do Not Use) martin, kate
Preview	<a href="#">Preview</a>
Created By	martin, kate - 23/04/2024
Last Edited By	martin, kate - 23/04/2024

## SmartMailer: Send Test

### Display:

- All Mailshots
- My Mailshots

### Mailshots:

- New Mailshot
- View Mailshot
- Send Test

### Templates:

- All Templates
- New Template

Please enter the email address and recipient name of where you would like the test mailshot to be sent to

Test Email Address:

luke.gratton@tractivity.co.uk

The following fields are what will appear in the mail merge fields set up within the mailshot

Title:

Mr

Firstname:

Luke

Lastname:

Gratton

Company Name:

Tractivity

Email Address:

luke.gratton@tractivity.co.uk

3

SEND TEST

CANCEL

# Send Mailshot

Now that you have successfully sent your test mailshot you can **Send Mailshot** or **Schedule**.

1. To send, click the **Send Mailshot** option.
2. If you're happy for your mailshot to be sent to all recipients, finally: click **Send**

The mailshot you have built will be distributed to your chosen stakeholders.

## SmartMailer: Send Test

### Display:

- All Mailshots
- My Mailshots

### Mailshots:

- New Mailshot
- View Mailshot
- Send Test

### Templates:

- All Templates
- New Template



Test email sent successfully

If you are happy with the test email you can either **Send Mailshot** immediately or **Schedule Mailshot** for a date and time of your choice

1

## SmartMailer: Send Mailshot

### Display:

- All Mailshots
- My Mailshots

### Mailshots:

- New Mailshot
- View Mailshot

### Templates:

- All Templates
- New Template

Are you sure you want to send the mailshot out to all recipients?

CANCEL

SEND

2

# Schedule Mailshot

If you have tested your mailshot and are happy, you can also **Schedule** your mailshot to go out later.

1. Click **Schedule Mailshot**
2. Select the **date** using the calendar view and the **time** you wish the mailshot to go out.
3. When you're happy select **Set**

The mailshot will trigger to be sent at the time you have selected. The status will appear **Scheduled** > **Sending** > **Sent**

## SmartMailer: Send Test

### Display:

- All Mailshots
- My Mailshots

### Mailshots:

- New Mailshot
- View Mailshot
- Send Test

### Templates:

- All Templates
- New Template

✓ Test email sent successfully

If you are happy with the test email you can either **Send Mailshot** immediately or **Schedule Mailshot** for a date and time of your choice

1

## SmartMailer: Schedule Mailshot

### Display:

- All Mailshots
- My Mailshots

### Mailshots:

- New Mailshot
- View Mailshot
- Schedule Mailshot

### Templates:

- All Templates
- New Template

Set the date and time you want the mailshot to be sent at

Date:



Time:

00:00



CANCEL

SET

3

# Copy Mailshot

**Copy Mailshot** allows you re-create a mailshot and make small tweaks. You may find this saves time rather than creating a new mailshot using the template you have previously set up.

1. In the **View Mailshot** screen, from the left-hand menu click **Copy Mailshot**
2. You will be taken to **Stage 1** of the mailshot. Several of the options will be pre-populated from the mailshot you have copied, but you will be able to add a new **Title** and change any existing information if necessary.

## SmartMailer: View Mailshot

### Display:

- All Mailshots
- My Mailshots

### Mailshots:

- New Mailshot
- View Mailshot
- Edit Mailshot
- Send Mailshot
- Schedule Mailshot
- Send Test
- Copy Mailshot

### Templates:

- All Templates
- New Template

Title	Kate Test Mailshot
Description	Test
Subject	Test
From Name	Kate
Reply-To Email Address	Kate.martin@tractivity.co.uk
Include HTML Link	True
Priority	Normal
Status	Tested
Owner Teams	Training Project (Do Not Use) martin, kate
Preview	Preview
Created By	martin, kate - 23/04/2024
Last Edited By	martin, kate - 23/04/2024

## SmartMailer: Edit Mailshot

### Display:

- All Mailshots
- My Mailshots

### Mailshots:

- New Mailshot

### Templates:

- All Templates
- New Template



### Mailshot Details

Enter basic details about the mailshot, including the subject line that will appear for your mailshot and who the email will appear from.

SAVE AND EXIT

CANCEL

Mailshot Title (internal use only)*	<input type="text"/>
Mailshot Description* (internal use only)	<input type="text" value="Test"/>
Email Subject*	<input type="text" value="Test"/>

# Mailshot Statistics

**Mailshot Statistics** gives you an overview of how your sent mailshots have been perceived by your recipients.

You can review open rates as a percentage, the number unique clicks made as well as reviewing how many of the URLs you added to your mailshot were accessed.

These stats can be viewed within Tractivity and can also be **Exported** via Excel.

## SmartMailer: Mailshot Stats

### Display:

- All Mailshots
- My Mailshots

### Mailshots:

- New Mailshot
- View Mailshot
- Mailshot Stats
- Export Statistics

### Templates:

- All Templates
- New Template

Unique Opens	0 (0 Total Opens to date)
Recipients opened (%)	0.00%
Unopened	0
People Clicked	0 (0.00%)
Total Clicks	0
Clicks Per Person	0.00 / 8
Didn't Click	0 (0.00%)

Links (8)	Opened Emails (0)	Unopened To Date (0)	Unsubscribers (0)
No one has unsubscribed from this mailshot			



## Help Guides

For any questions around this or other Help Guides, please contact your dedicated CSM or the wider team at: [customersuccess@tractivity.co.uk](mailto:customersuccess@tractivity.co.uk)  
[www.tractivity.co.uk](http://www.tractivity.co.uk)