Emma at a Glance

How Emma Works

EMMA is a resource for creating and sending professional emails. Below is a simple walk through how to use the system.

Platform Administrators:

- Kyle Martin, Marketing and Communications Director

Getting Started

An Invitation to Emma

Once you are prepared to access Emma, contact Student Success and Well-Being's Emma Lead to ask for an invitation to the platform. The invitation will be sent to your work email address.

After the invitation is sent, you will click the "ACCESS YOUR NEW ACCOUNT" button. The button will bring you to the Emma platform, where you will create your own password.

Note: All user invitations expire after 15 days. It is strongly recommended that you bookmark the login page to easily find it again.

Logging In

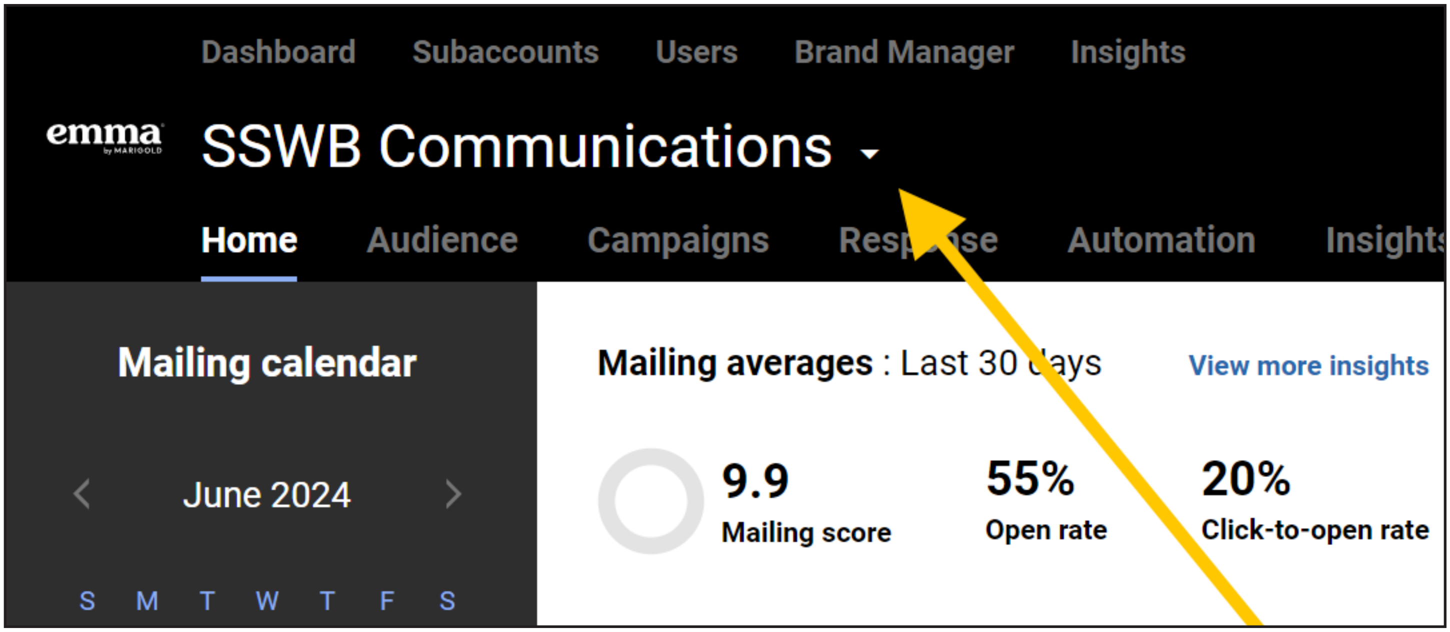
Open a web browser (Google Chrome is recommended), and type **home.e2ma.net** into the navigation bar. Click "Log In" in the upper righthand corner. **Please note that the username is case-sensitive , and both first and last name should be capitalized. E.g. Ima.Knight@ucf.edu.**

Enter your ucf.edu email address in the username area. Enter your self-selected password in the password area. Then click "Log In."

Finding your Subaccount

Employees will have access to more than one subaccount, so it is important to pay attention to which one you're working in.

To be sure you're in the right account, navigate your cursor to the top of the page. There will be a grey bar with a drop down menu in the top-left corner.



Emma Navigation

- Home: When you log in, this is the page you see. You can access all features of the account here.
- Audience: This area displays information about our constituents and their email addresses. This view is not available to email authors. The audience segment is managed by the SSWB Emma Lead and the SSWB Emma Account Holder.

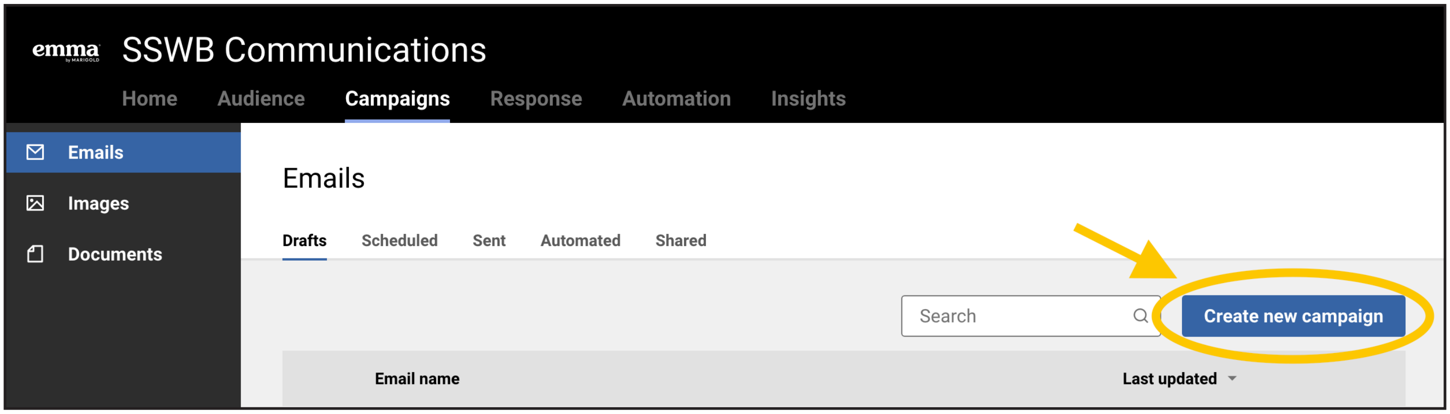
NOTE: The limited access to this feature is to prevent the addition of outside data. Our Emma contract is based on the number of contacts in our databases. If staff is uploading/adding/editing their own lists, it puts our contract at risk of overage and will incur a fee.

- Campaigns: This area is where you will find the resources to build your emails, including a template gallery and pre-made branded templates. In this view, you can find drafted emails, scheduled emails, sent emails, and shared messages from the management account.
- Response: This area provides results specific to your sent email campaigns.
- Automation: This feature is for advanced email campaigns and will send automatic messages to constituents who take a certain action.
    - NOTE: Do not set up without the help of the SSWB Emma Email Lead.
- Insights: Offers advanced analytics of the entire subaccount, not just a specific email. Gives the user access to open rates, click rates, trends, heat maps (shows where on an email people are clicking), an option to export results, etc.

Create Your Message

Creating a new email (campaign)

Navigate to “Campaigns” and click “CREATE NEW CAMPAIGN”



A box will pop up to name your email. Use the standard naming convention and click “CONTINUE.”

<u>NAMING YOUR CAMPAIGNS</u>: Email campaigns should be named with easy to find and classify naming conventions. So, for example:

- July 2025 Newsletter
- July Event Promotion
- 2nd Registration Reminder, July 2025

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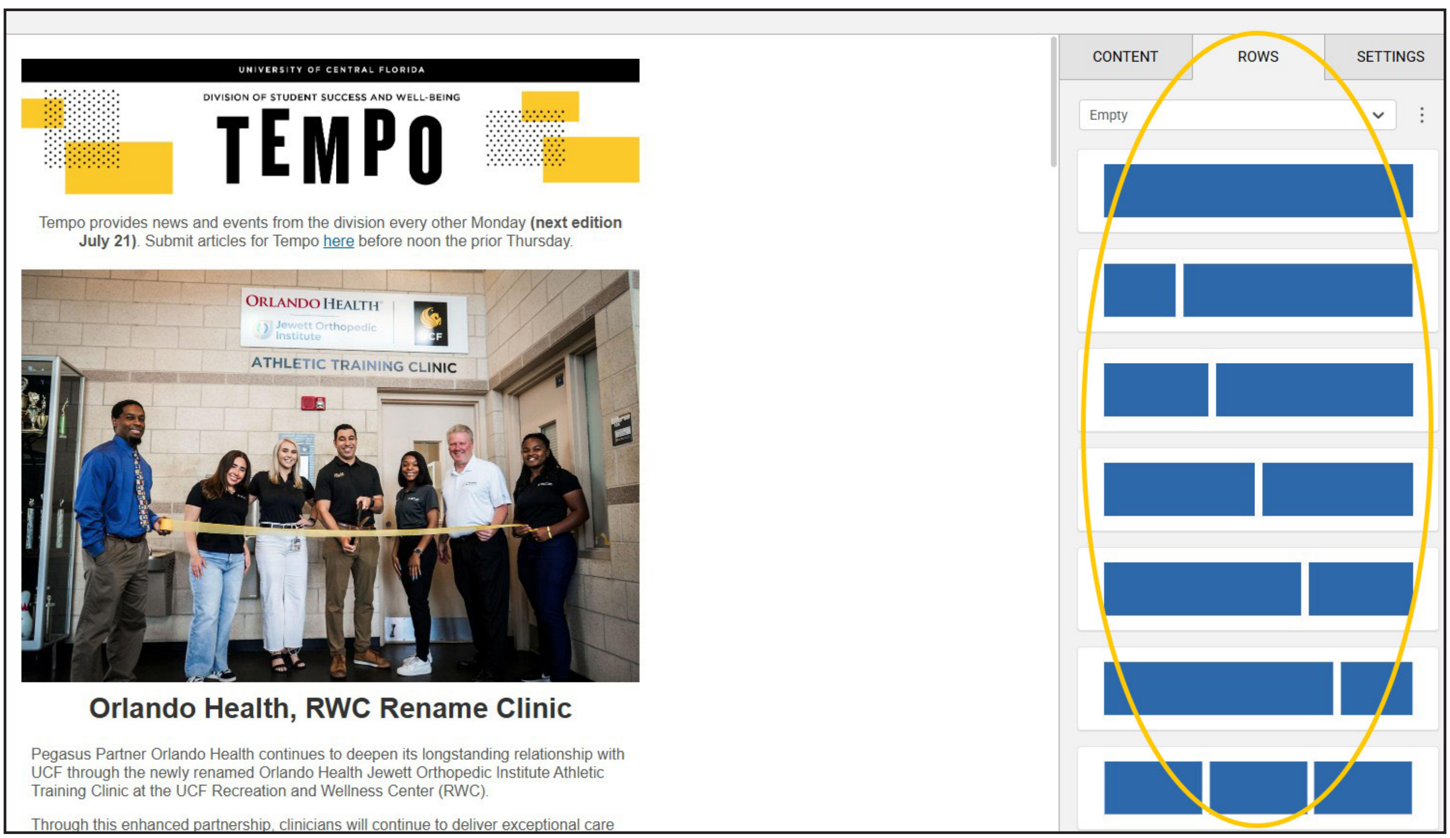
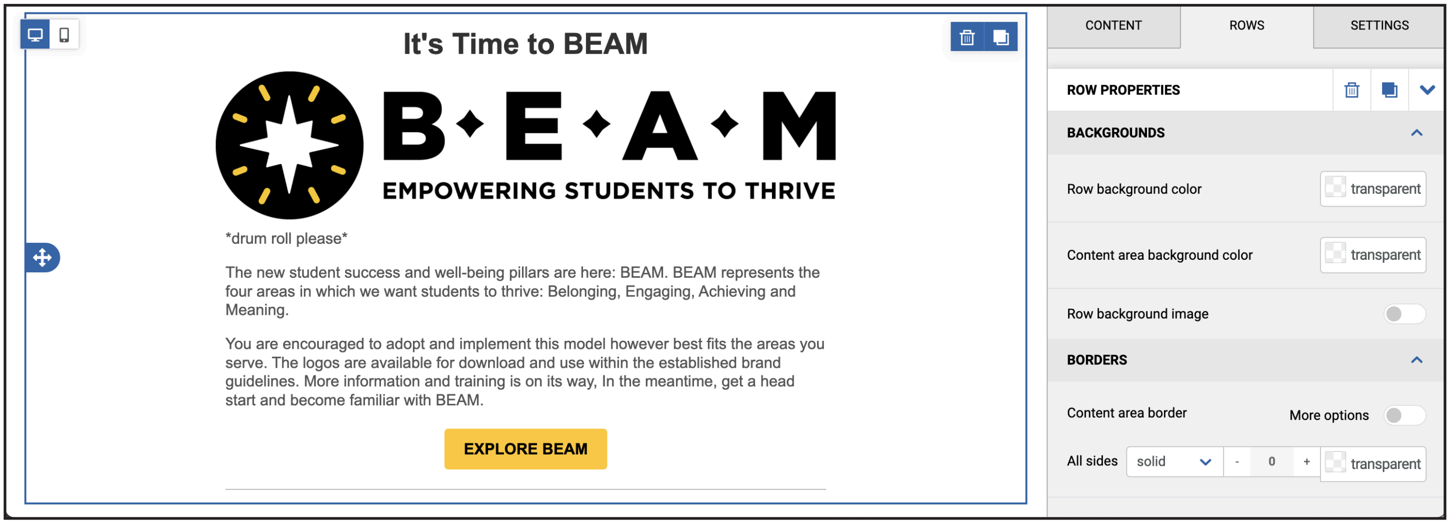
You can create a campaign completely from scratch, or duplicate and update a previous email. Before adding content you need to establish a row.



Row properties

- Rows are defined by the columns they possess and can include 1-6 columns. Each row has its own properties where you can adjust the styling or amount of columns.
- Clicking outside of the content area of a campaign will bring up the row properties in the editor panel. Doing so will also present the options to Delete or Duplicate the row, just look for the small icons found in the upper right corner of the row.

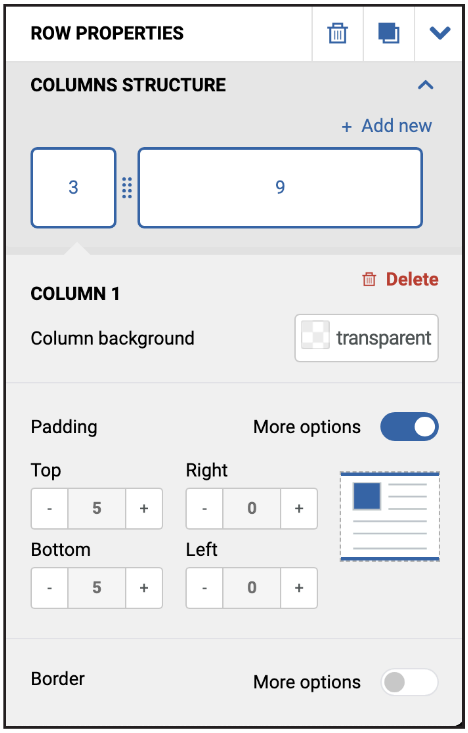


Row background color

- The first property that you can set is the background color for the row. One thing to keep in mind is that changing the background color here will overwrite what is in your settings tab.
- Click on the color swatch to bring up the controls. You'll see the theme colors as swatch options that you can select. Or, if you'd like to choose a color, use the slider to select a color to start from. You can also place your cursor inside the color block and click accordingly to select a color.

Content background color

- This is the background color for the body of your campaign. While you cannot edit the background color for each content block, you can edit the background color for an entire row and for columns within that row. This means that if you have multiple content blocks within a row or column, they will have the same background colors.
- Click on the color swatch to bring up the controls. You'll see the theme colors as swatch options that you can select. Or, if you'd like to choose a color, use the slider to select a color to start from. You can also place your cursor inside the color block and click accordingly to select a color.



Customize columns

- You can adjust the number of columns in the row in a few ways. To add a new column to the one you are currently in, click on the + Add new button, then continue to click on it to add additional columns.
- Or to adjust the column size, hover over the dots in between the columns in the editor and then drag the columns left or right to adjust their attributes. You can add up to 6 columns, or click on the Delete button to remove columns. However, the order of the columns cannot be changed.
- Any time you click on a column, its attributes will load below where you can adjust its background color and padding. In addition, when you are working with a row that has two or more columns, you will also see options to adjust the border.

Column background

- You can set the column background color based on the column you have selected. Click on the color swatch to bring up the controls. You'll see the theme colors as swatch options that you can elect. Or, if you'd like to choose a color, use the slider to select a color to start from. You can also place your cursor inside the color block and click accordingly to select a color.

Column Padding

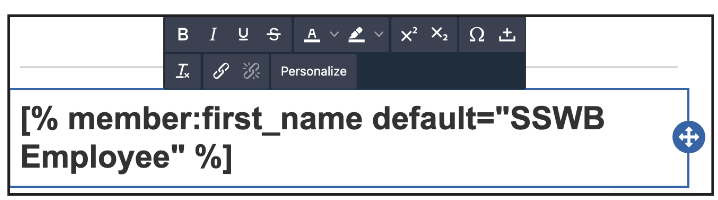
- You can adjust all 4 sides of the padding of the column altogether by leaving More options toggled off and increasing the number inside the box. Or you can switch it on and then adjust each of the 4 sides individually.

Content Tab

Adding text

To add text into the email, be sure to have a text box selected in a row. Click on the pre-determined text boxes and begin typing. If no box exists, drag and drop the "Text" option from the lineup on the right.

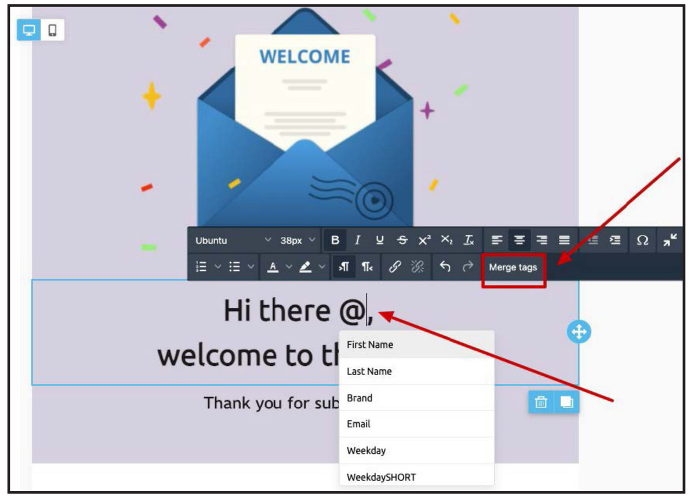
Personalization



To insert a personalized field (first name, last name or full name — depending on what contact fields you currently have available and filled out in email lists), click into a text area of the email. Then, the grey toolbar will pop up along the top of the message. Click "Personalize" and select the appropriate personalization field tag from the dropdown menu (you will most likely choose "First Name"). On the right, fill in a placeholder for any constituents without names in their record. Examples include: Knight, Friend, valued partner, etc.

The personalization will show up in your text box as “[% member:first_name default=”” %]” — this means it will pull in the person’s name or use the placeholder once the email is sent. You must remember to put a placeholder in case one of your contacts doesn’t have a first name field pull up.

In addition, anytime you are typing inside a text block, you can use the “@” shorthand to bring up your list of available merge tags.



Images

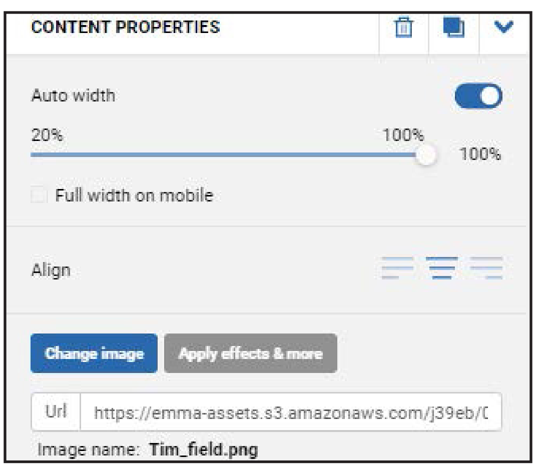
Rule on image sizes:

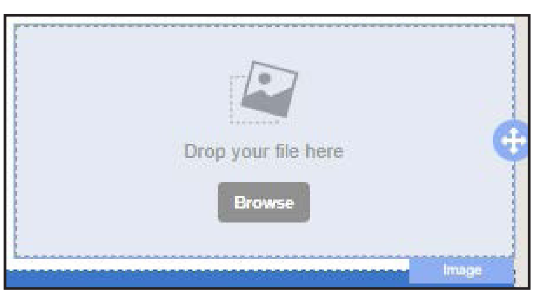
All images uploaded into Emma should be 680 pixels wide or smaller. Anything larger than 680px will make your email harder to deliver to the recipient’s inbox. Emails with photos that are too large will be rejected when asked to send.

Think of it like mailing a package — the larger it is, the heavier it is and the more difficult it is to deliver. Email inboxes work the same way! If you’re always giving Gmail, Outlook, Yahoo, etc. BIG emails to digest, they’ll start to send UCF emails to the spam folder.

Rule on image names:

To comply with ADA policies, all images should have basic, clear names that describe what is in the photo. So, before you upload a photo into Emma, remember to rename it appropriately.





Examples include: Kelsey_Headshot.jpg, Knight-at-the-Museum_Header.png, UCF Coastal Logo.jpg

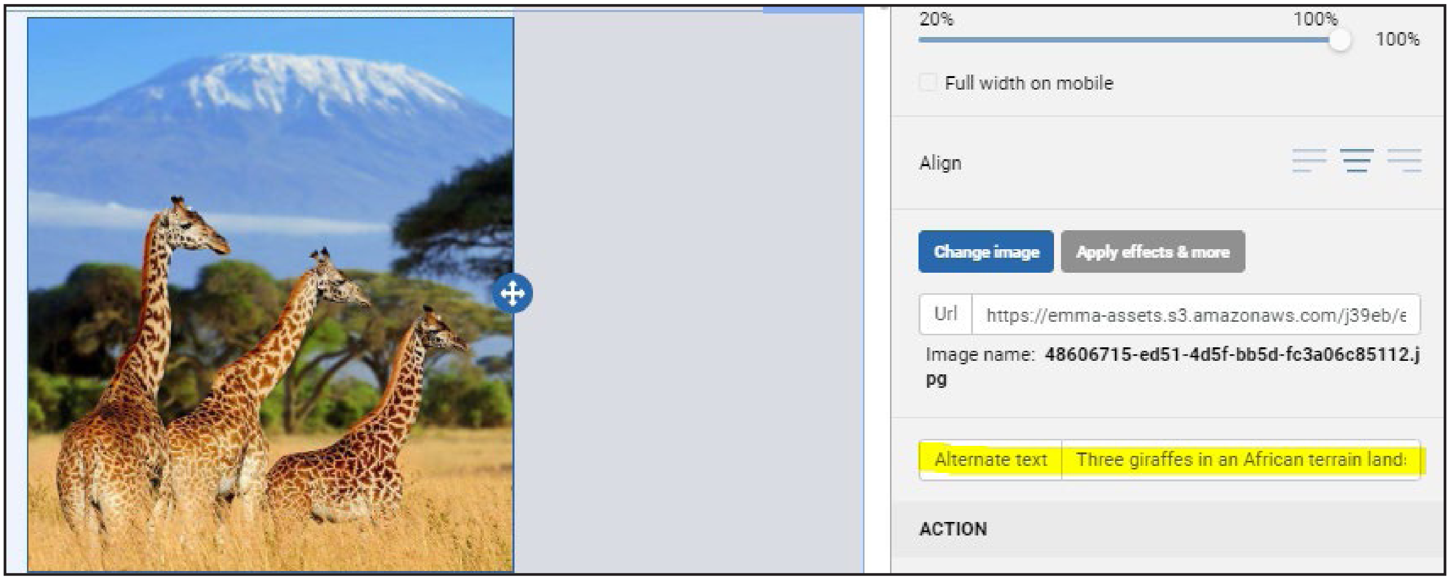
Uploading Images

Emma allows you to easily upload photos to your emails. To do this you have two options:

- **Option 1: Replace existing photo**
  Click on the existing photo and replace using the “CHOOSE ANOTHER IMAGE” button on the top left (after the photo opens). From here, you can upload a new image from your computer or choose one that already exists in the Emma library.
- **Option Two: Add a new photo tile**
  To add an image where one does not already exist, drag an “Image” tile from the right-hand menu and drop it in the row area you want to add a photo/graphic. Once the tile is placed, you can upload a new image from your computer or choose one that already exists in the Emma library.

<u>Rule on alternate text:</u>
Once the image has been loaded, you must fill in the Alternate Text option. This allows our emails to be compliant with ADA policies by providing a text description for those who receive the email but cannot process the image.

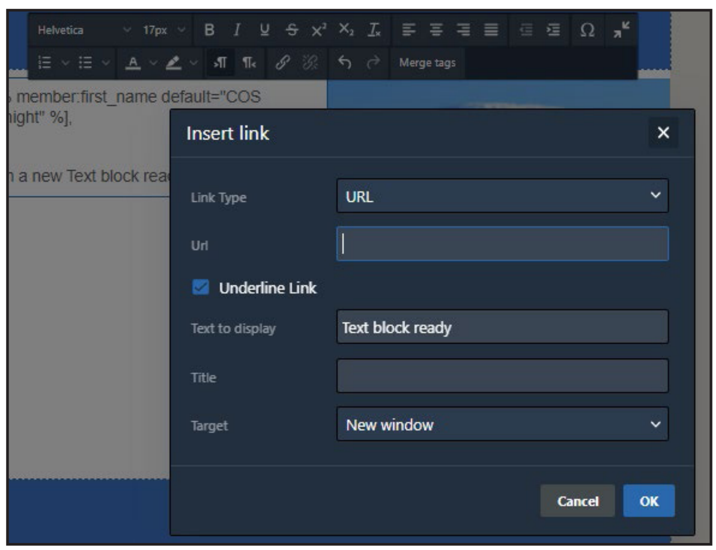
A simple few words to describe the image will suffice. An example is provided in the screenshot below.



Finally, note that you can add a link to an image, save it to the Emma image library, and resize it within the email before you save and close it!

Text Links

Linking photos is described above, but in-text links are just as easy to add. Simply click into a text area and highlight the text you need. Then, click the icon of the chain-link on the toolbar. A box will pop up for you to populate your link in.

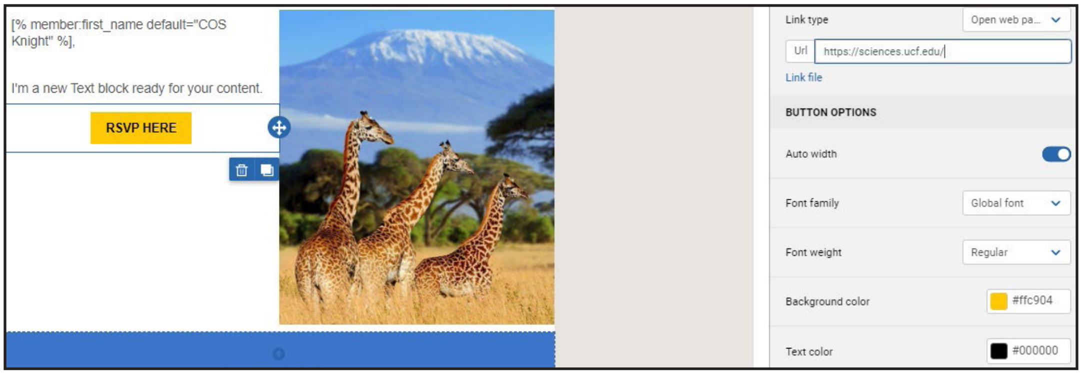


You can paste your link directly into the “URL” section. Feel free to fill in the Link Name and Tooltip areas if you see fit.

You can also use the email address, document, or Survey Monkey options to link to these areas. Each option offers intuitive information on how to fill them out.

- **<u>Pro Tip:</u>** Consider using the document option to link a parking pass for events!

Buttons



To add a button, click an existing button to edit its features or drag and drop the "Button" tile on the left to the area you'd like it to exist.

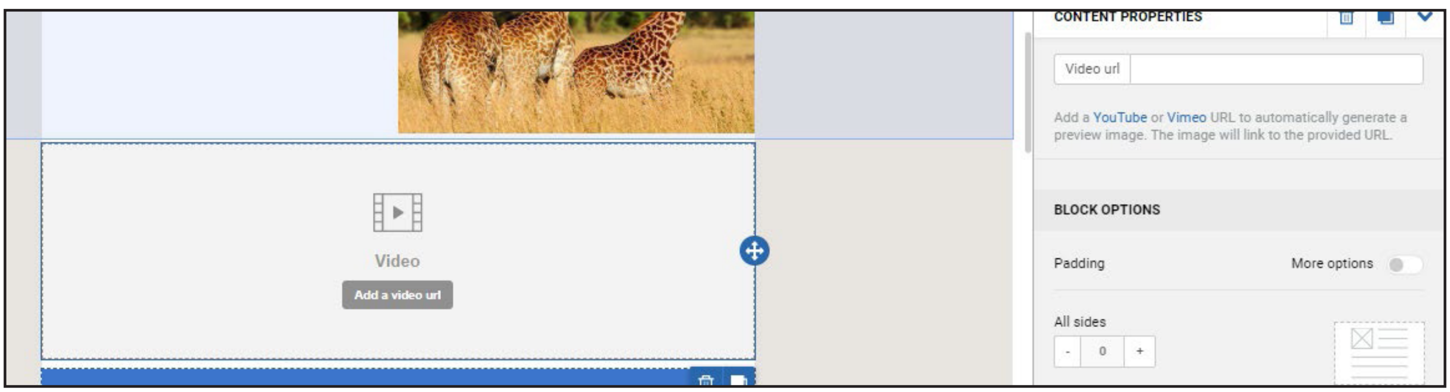
A box will appear to edit the details of your button. Remember to make sure the text is a concise, clear call to action.

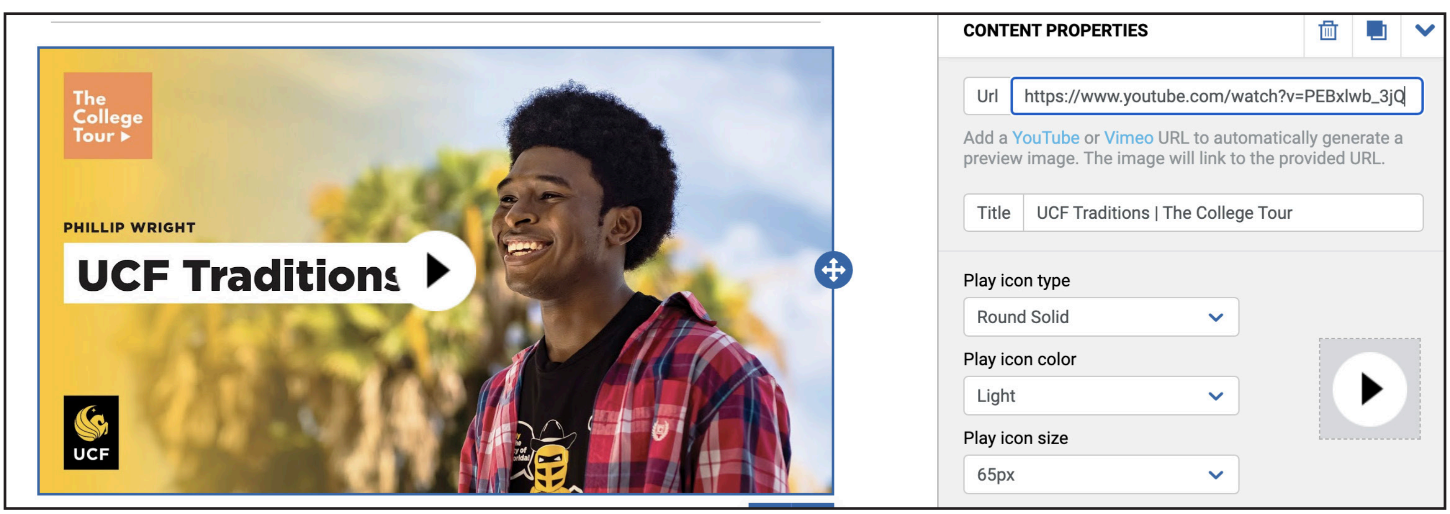
Please note that buttons should be black or gold (#ffc904 or #e5b800) to comply with brand standards.

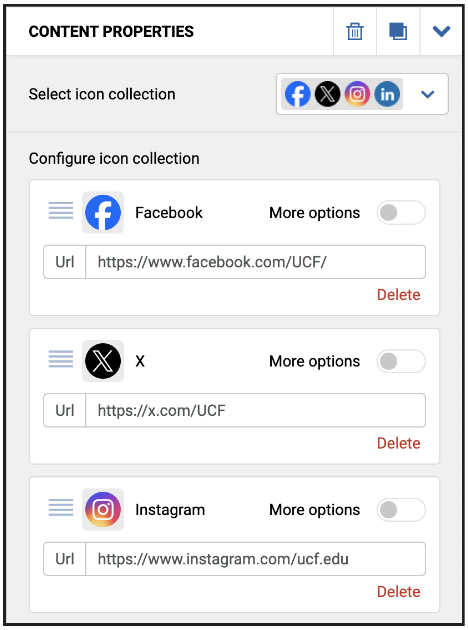
Videos

Adding a video is easy! The email will not house the video directly, but it will take the link provided, grab a screenshot, and link it for you. To add a video, begin with the video template email, or click and drag the "Video" tile from the options on the right-hand side of the screen.

A box will appear for you to provide the video link. Insert a YouTube or Vimeo link and fill out the alternate text box. Then click "INSERT VIDEO."







Social Media

Add social media buttons to your email by using the drag and drop editor to add the "Follow" tile to your email. A box will appear for you to add the last piece of your social platform URLs to the provided areas. The only icons that will appear are those that you populate. You can choose the design of the icons on the right, and manipulate the size, color and position of the icons using the dropdown options on the top right. Once you're satisfied with the icons, click out of the content box.

Settings Tab

The third tab represents the general settings for the campaign. However, it is important to note that these settings become the general options that will apply to the entire campaign. This means that the font family that has been determined in the settings tab as the default font will then be used everywhere in your campaign, except where you use a custom setting.

We highly recommend sticking with fonts such as Arial or Helvetica to stay on-brand.

For example, if you selected Arial as your default font in the settings tab, you would see Arial used as the font for any text blocks in the campaign. Refer to this article for more information on the settings tab and how it can be adjusted.

Autosave and using the Undo, Redo, and History options

Anytime you are using Emma's drag and drop editor, the campaign content will be autosaved every 60 seconds. This means that changes are always being tracked and you can also revert back to older versions whenever necessary.

When any change is made to an open campaign, look for the small icons that appear in the bottom left corner of the editor. Click on the left arrow to Undo your last action, the right arrow to Redo your last action, or use the History icon to revert to one of your saved iterations.

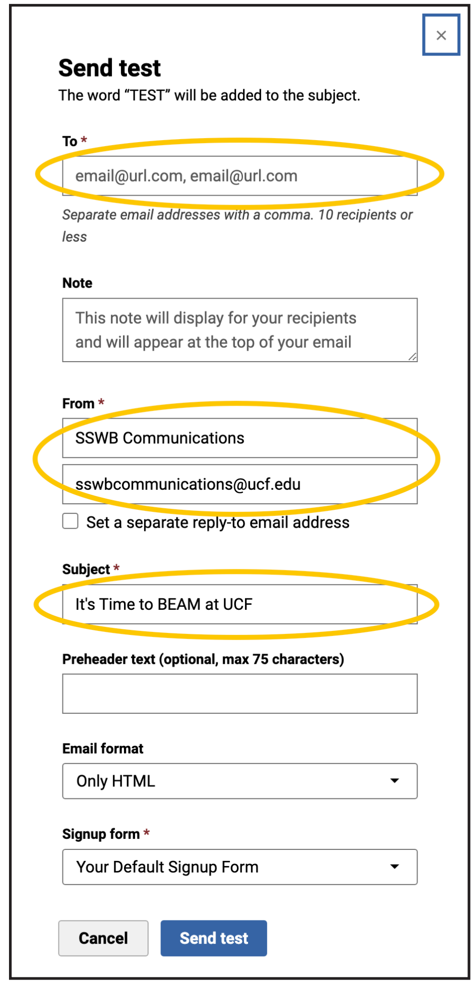
If you would like to revert to one of the saved iterations of the current campaign you are working on, after clicking on the History icon, you'll see a list of timestamps and a log about what change was made for each. All you need to do is determine the place you'd like to revert back to and click on the timestamp.

Just be aware that when you go back, the timeline for more recent changes remains available, allowing you to move forward again, without losing any of the edits.

Review and Send Your Message

Send a test email

- Once you've saved and are ready to send a test email, click the grey "SEND TEST" option at the top-right of the editor. A rectangle will appear in the center of your screen for you to fill out. Once you've filled out the text areas (circled in red), you can click "SEND NOW."
  - Pro Tip: This should be a test email for your supervisor/team to review. Once they have reviewed and you have made all edits, you can proceed to the next step.
- Once each of these is filled out, click the blue "REVIEW" button.
  - A page will appear where you can choose the audiences that you would like to send the email out to.
  - Below that you can edit your subject/preheader lines if needed. (Be sure to spell check for any errors!)
  - You can also edit your sender's name and email to be as specific as you want. Keep in mind it must be a @ucf.edu email address.
- Once all of these sections are filled out accordingly, you will have the option to "SEND NOW" or to "SCHEDULE FOR LATER" which gives you the option to send anytime in the distant future.



Audience

Due to our limited-contact contract, please contact SSWB Emma Lead Kyle Martin before uploading new email lists to your account.

Groups

Before importing contacts you'll need to create a Group. This will house your imported list. Like campaigns, your naming convention should be specific and easy to identify.

Segments

Segments are active, refreshable lists. We are still working on perfecting this option for our college-wide constituents.

Responses

This area provides results specific to your sent email campaigns.

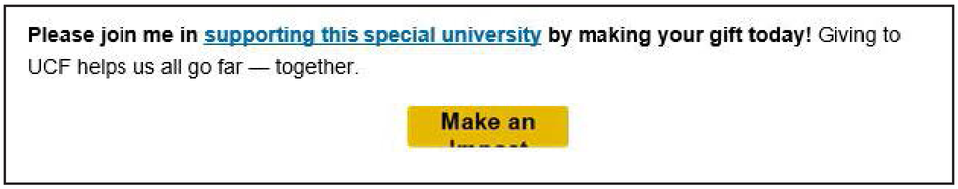
Help/Support

Emma has an incredible Support Hub that touches almost every topic under the sun. Before contacting the Emma COS lead, search for your answer via the Hub: help.Emma.com

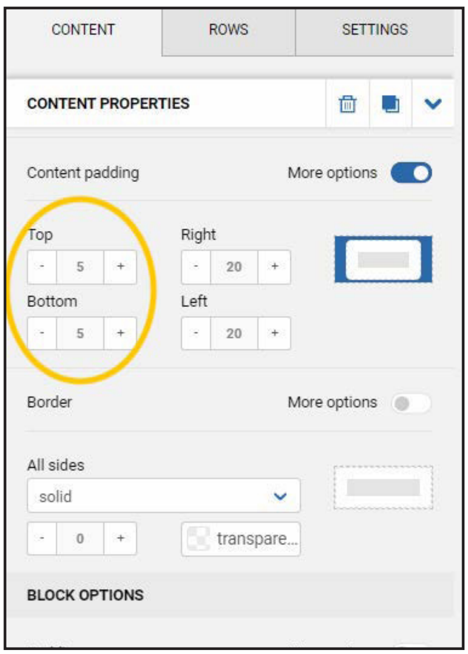
Common Issue

<u>Buttons Cut Off Text</u>

One common technical glitch that we've seen happen with the new Drag and Drop Editor is when buttons slightly cut off text in the message. For example:



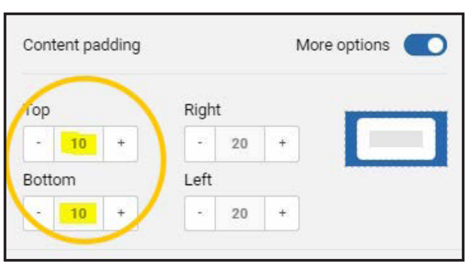
To help resolve this issue, when you have the button selected and look over at the Content > Content Properties toolbar (on the right-hand side) scroll down until you see "Content Padding".



You will need to increase the Top and Bottom padding around the button. They are currently programmed to have just 5 pt padding.

You will need to increase the padding to 10 pt.

By increasing the padding, your button should show up legible in your reader's inboxes both on the computer and on mobile.



Happy email creating!

Last edited: 7-16-2025 by Kyle Martin