

Start sending emails

1. To create and send a message (or series of messages) via email, go to the Conversation Manager.

The screenshot shows the Dana Connect dashboard. At the top, there's a navigation bar with 'Knowledge Center', 'Support Chat', and 'Sign out'. Below this, the 'Home' tab is selected. The dashboard features several sections: 'SEND COMMUNICATIONS' (with a link to configure email, call, and SMS), 'MANAGE YOUR LISTS' (with a link to manage contact lists), and a 'Quick Start' section with buttons for 'Empty', 'Email', 'SMS', and 'Call'. A table titled 'Communications sent this month' shows data for 'Canal', 'Standard', 'Premium', 'Total', and '%'. Below this is a 'Report of Communications' section with a bar chart for the year 2020. On the right, an 'Applications' section is highlighted with a red box, containing a grid of icons for 'Conversation Manager', 'Contact Manager', 'Reports', 'Audit messages', 'DMARC Reporter', 'Inbound Manager', 'Security Dashboard', 'Message Deliverability', 'Document Storage', and 'Document Manager'.

Canal	Standard	Premium	Total	%
SMS	4	0	4	

2. Create a new Conversation.

The screenshot shows the Dana Connect 'Conversation Manager' interface. At the top, there's a navigation bar with 'Knowledge Center', 'Support Chat', and 'Sign out'. Below this, the 'Home' tab is selected, and the 'Conversation Manager' sub-tab is active. The interface includes a sidebar with 'My Conversations', 'Favorites', 'Trash', and 'CATEGORIES'. A 'New Conversation' button is highlighted with a red box. The main area displays a list of conversations with columns for 'CONFIGURATION', 'ACTIVATIONS (1)', and a date. On the right, there's a 'Latest activations' section showing details for a conversation titled 'Prueba'.

CONFIGURATION	ACTIVATIONS (1)	DATE
		28-02-2020
		27-02-2020
		19-02-2020

3. Select the email channel or an empty conversation, name your conversation and select your contact list or just skip that step and click on create.

← New conversation

Select a conversation model:



Not selected

Select a contact list:

☒ Select later

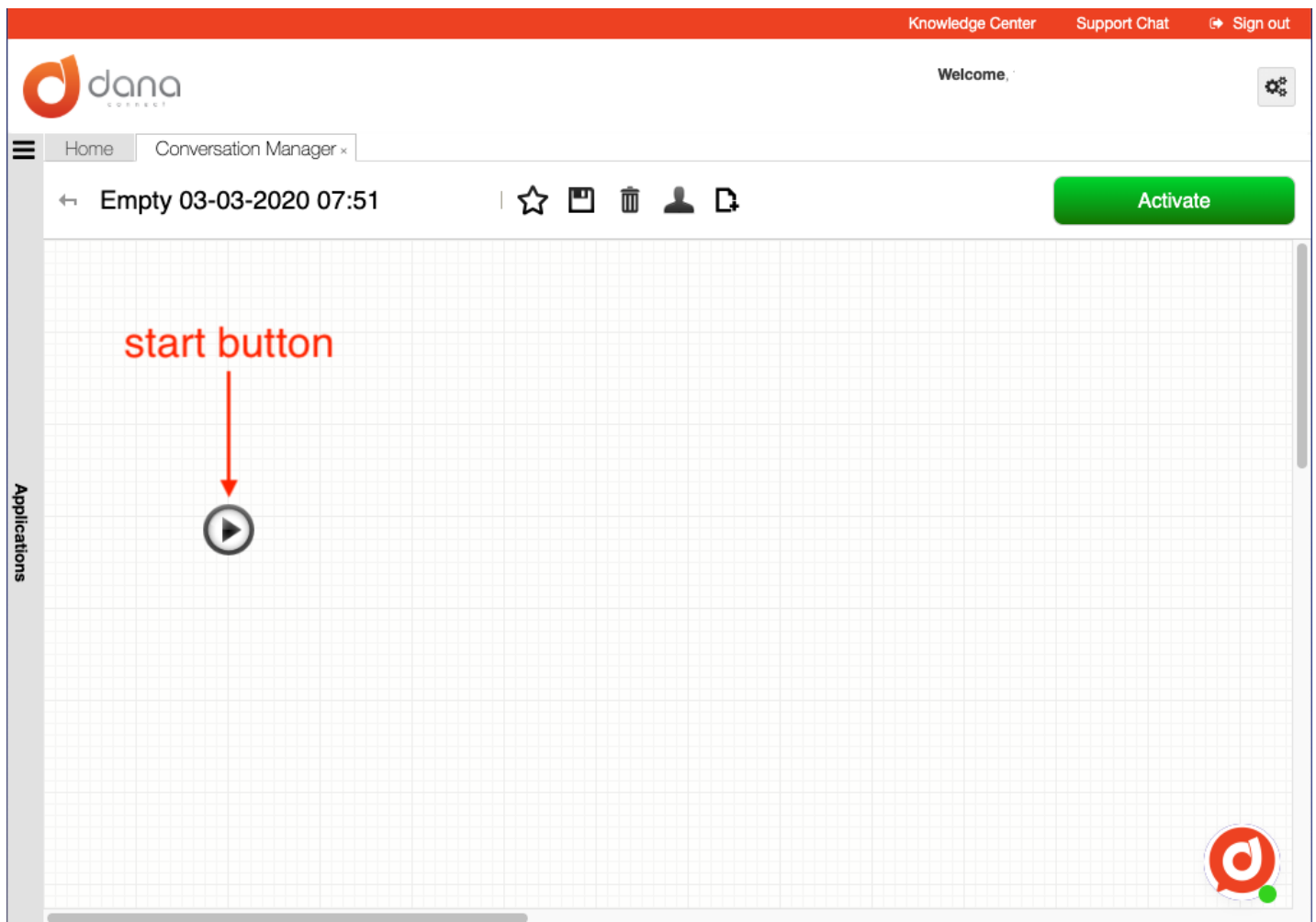
☐ Select now

Not selected

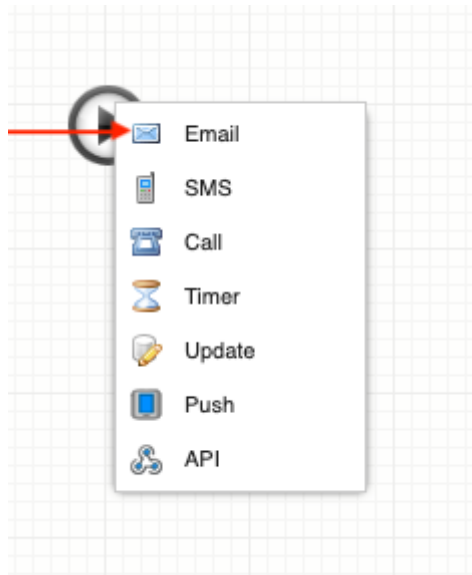
Name:

Create

4. Click on the start button.



5. Add an Email Node to your conversation.



6. You have then a new Email Node called New Step. Double click on the New Step and the Email Editor window appears.



7. Add the sender name, the sender email and the Email subject. Add content to your email by writing, copy/pasting or selecting a template.

EMAIL

Email Basic Data

Name of Step: ☐ Use alternate address ☐ External Trigger

From Name: From Email:

Subject:

HTML | Insert Label | Template | Send to one contact | Landing Page | Special Tags

Body text: Hello

body p


Close Save

⚠ The sender's email must be added to the *senders list* before it can be selected from the drop-down menu. To learn how to add a sender to your sender list, see this article: [Add a sender to my senders list](#).

ℹ You can add dynamic content pulled from the contact list with labels inserted in your message to personalize it. See [How to add dynamic content to a message](#).

8. Close the email node when you're done editing and click on Activate.



 You can add more than one node to a conversation to make a Drip Email Campaign. See [Drip Email Campaign \(opened filter\)](#)

9. Click on select to select the contact list you want to send the email(s) to.



← Activation

Contact list:



Name: Not selected

Number of contacts: Not selected contacts

Select

Details

Conversation Service Type:



Service:

Mercadeo

Activation date and time:



Activation date:

Immediate sending

Activate

10. In the Contact list window click on the contact list name and then click on select.

← Activation

Contact list:



Name: Not selected
Number of contacts: Not selected contacts

Contact list				
Find...				
Category	Name	Segment	Total	Details
All	My Customers 1	All contacts	17695	Explore
All	My Customers 2	All contacts	113695	Explore
All	My Customers 3	All contacts	25323	Explore
All	My Customers 4	All contacts	35423	Explore
All	My Contact list 1	All contacts	26415	Explore
All	Segmented by region 1	Region 1	44241	Explore
All	My Contact list 2	All contacts	34557	Explore
All	My Contact list 3	All contacts	23534	Explore
All	Segmented by region 2	Region 2	56462	Explore
All	Segmented by region 3	Region 3	23411	Explore

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Close Select

Activate

11. Then DANAConnect will tries to make an automatic mapping of the fields that have similar names.

← Activation

Contact list:



Name: My Contact List (All contacts)
Number of contacts: 35464

Change

Details

Label equivalence:



1- [Email] Mail (2 Items)

Preview

Email Email




→ First_Name Name





The fields on the **left column** are the ones you are using in your messages, and the fields on the **right column** corresponds to fields in the contact list you selected. In some cases, the system wouldn't find an equivalence in the names, so you have to make the mapping manually.

Label equivalence:




1- [Email] Mail (2 Items)

Preview

customer	 Not set	▼
Email	 Email	▼

12. Select the type of service for your Conversation. In most cases the type of communication is Marketing, but it could be Transactional communications, Billings, Mandatory communications, etc.

Conversation Service Type:




Service:

Marketing

13. Select the date and time of activation. The most used is Immediate Sending, but you can activate also by programming a future date and time, periodically or by a Webservice (Webservice activation is recommended for advanced users).

Activation date and time:



Activation date:

Immediate sending

Immediate sending

Specific Date and Time

Web service

Monday through Friday

Tuesday and Thursday

Monday, Wednesday and Friday

Everyday

First day of the month

First Monday of the month

Every Monday

Every Tuesday

Every Wednesday


Every Thursday

Every Friday

14. Click on the activate green button at the bottom of the page.


← Activation

Contact list:




Name: My Contact List (All contacts)
Number of contacts: 23452 contacts

Label equivalence:




1- [Email] Mail (2 Items)

customer

 Name


▼

Email

 Email


▼

Conversation Service Type:



Service:

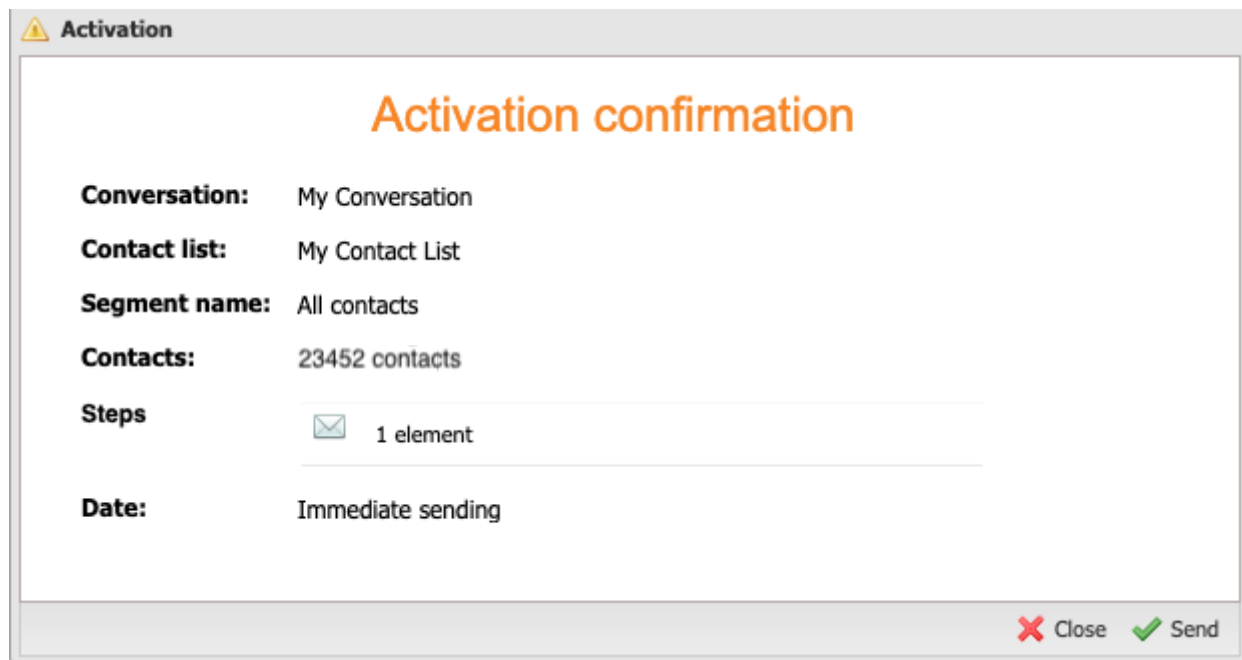
Activation date and time:



Activation date:

Activate

15. You get an activation confirmation with the information abstract of your conversation. Click on Send to confirm the activation.



16. Your conversation is active now and you see the live reports window. The report will show you more data as time passes and your contacts interact with the email message.

The interface shows the "My Conversation" page in the Dana Contact Manager. The top navigation bar includes links for Knowledge Center, Support Chat, and Sign out. The user is logged in as "farroyo" with ID 197054, and the account is marked as "(Marketing)".

The main section displays the campaign details: "04-03-2020 16:15 by farroyo ID 197054 (Marketing)" and "Immediate Scheduling". The campaign is "Sent to My Contact List (All contacts)..." and has reached 16775 contacts. The status is "ACTIVE".

Below the campaign details, there is a visual representation of the email being sent, showing a play button icon and a green box labeled "Mail" with "16769 messages".

The bottom section contains four panels:

- Contacts:** 16775
- Transactions:** 16769
- Spam:** 2
- Blocked:** 4

The **Distribution** panel shows a world map. The **Totals per Node** panel shows a bar chart for "EMAIL" with a value of 1.0. The **Distributions per Node** panel shows a green circle representing 100% for "EMAIL".

