Email Campaign Send Checklist: Accurate Recipients and Controls v1

Following this checklist ensures your email campaign is sent to the right people with the proper controls. Use the Report Builder under Reports to pull Starter Reports like "Complete Abstracts," which contain fields like Control Complete Status, Control Program Status, and Activity Type. These reports can confirm that the Campaign is being sent to the correct recipients.

Reviewers	Sessions	Sessioners	Presenta	tions Can	npaigns	Forms	Onsite		Reports	Reports Prese	
									Centralized disclosure review		
						Score repor	ts	•			
						Session reports		•			
Authors	Authors		Controls			Sessions			Fina ized re	ports	►
Client Report	Starter Report		Client Report	Starter Repo	rt	Client Re	port	Sta	Report buil	der	
Accepted Sessions		-						Report wizard			
			Complete Abstracts			Sessions Without Roles			Copy reports		
			Abstracts with Average Score			Sessions by Category			Abstract content		
			All Assigned Controls in Sessions			All Active Sessions			Session content		

□ Make sure to explore additional dashboards, such as Submissions, Reviewers, and Sessioners, for filtering options based on Session Type, Presentation Number, Activity Type, Statuses, and any Extra Data Fields that may not be visible on the Campaign recipients page.

• You can use the Advanced search feature on these dashboards to apply filters and open a duplicate tab to compare and filter the results with the Campaign recipients page so that your intended recipients are targeted accurately.

Submissions dashboard & mana	ger		Overview ON 🌔		
Control #	Activity type	Completed date	Last edited date		
\$	▼ 1 / 10 options filtered ⊗ Clear ✓	mm/dd/yyyy -: 🗂 to mm/dd/y	yyyy -: ☆ mm/dd/yyyy -: ☆ to mm/dd/yyyy -: ☆		
Title	4 ⊘ Search	Торіс	Completion status		
\$	Gap Submission		◆		
Program status	E Hands-on Instructor	Session title(s)	Session type(s)		
~	Late Breaking Abstract		♦		
Session role status(es)	Medical Student Program Abstracts	Posterboard number(s)			
\$	Scientific Forum				
Submissions	Speaker Staff Liason Video-Based Education	▼1 Filter set x ➡ Showing 2038/6227 Page Size 50 ▼ First Prev 1 2 3 4 5			
Control # Activity type Last edited	date 🔺 litle Author block	Topic Completion status	Program status Session number(s) Actions		
□ 40 Scientific Forum 12/15/202	I, 12:08 PM A Cas∈ 🛔 B. I	General Sur Finalized	Accepted [SP20 [e-Posters IV		
40 Scientific Forum 12/21/202	I, 07:01 AM Angioç 🛛 🛔 Ela	Trauma/Bu Finalized	Rejected		

 \Box Send a (1) test email to yourself AND (2) to a real test control shown below. Check that the email is displayed correctly on various devices like desktop computers, laptops, tablets, and smartphones.

Enter your search term(s) Q				2 communications selecter 2 Advanced search OFF ①					
Recipients O ADD CONTROLS						🖬 Sł	nowing 10/10		
	Recipient last name	First name	Email	Control #	Actions	1	Q		
	Agullo-Pascual	Esperanza		2	•)	1	b		
	Chen	Xiao	⊠t.s.mejudhon@gmail.com	2	ι	ude1 Send	Test		

□ Schedule the Campaign to be sent at an appropriate time. Consider the time zones of your recipients and the best time to send the email for maximum engagement.

Pro tip: Compare campaign data by exporting controls from cAdmin using an "If/Then" formula:

- 1. Export your controls data to a spreadsheet.
- 2. Copy and paste the columns you want to compare next to each other on a new worksheet or in the same file.
- 3. Create a new column for the "If/Then" formula.
- 4. Use the format =if(A2=B2,"","ERROR") in the first cell of the new column to compare the cells you want to compare.
- 5. Copy the formula down to the other cells in the column to compare the rest of the controls.
- 6. Review the results to identify any errors and adjust the campaign recipients as needed.