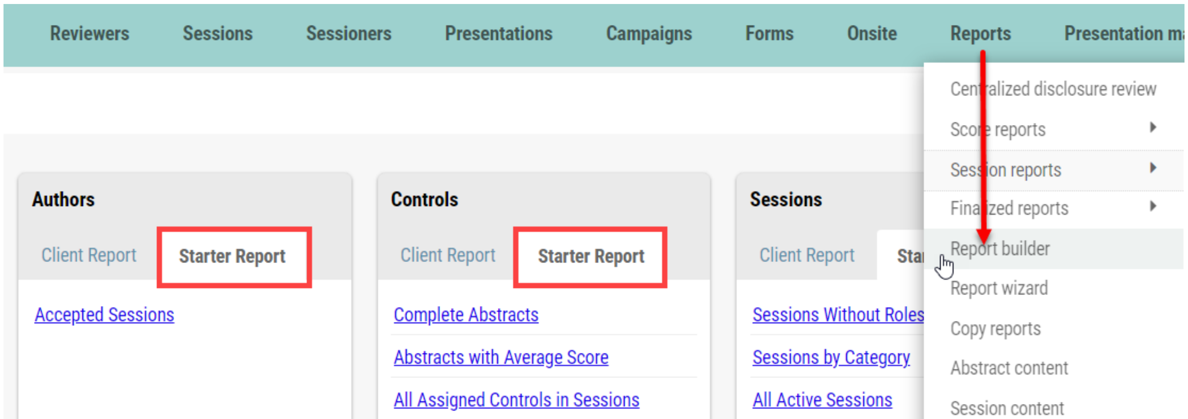
Email Campaign Send Checklist: Accurate Recipients and Controls v1

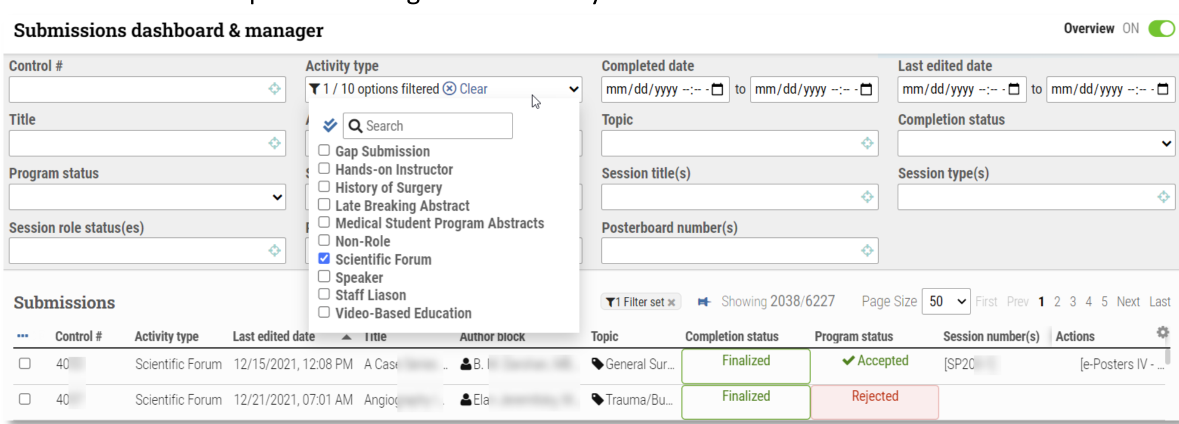
Following this checklist ensures your email campaign is sent to the right people with the proper controls.

☐ 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.

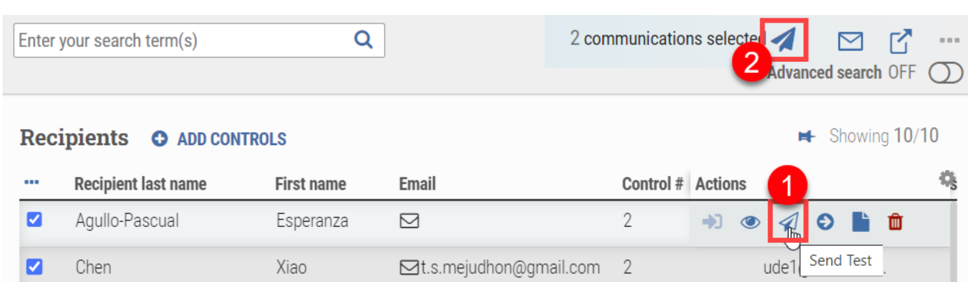


☐ Make sure to explore additional dashboards, such as Submissions, Reviewers, and Sessioners, for filtering options based on Session Type, Presentation Number, Activity Type, Statuses, and any Extra Data Fields that may not be visible on the Campaign recipients page.

- 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.



☐ 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.



☐ 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.