

Automatic Email Delivery Setup Guide

for GuideSpark Communicate Cloud

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GuideSpark Communicate Cloud offers **Automatic Email Delivery** to send your campaign's reach emails directly to your employees. When set up in collaboration with your company's IT, emails are shown as coming directly from the sender (*you, or whomever you designate at your company*), rather than from GuideSpark.

Automatic Email Delivery helps you:

- Segment analytics results at human scale rather than at a campaign summary level.
- Compare segments to spot groups that may need extra help and guidance.
- Avoid the complexity of forwarding emails manually, allowing you to more easily manage multiple campaigns.

i *This feature also requires that you upload employee info to create a **Targeted Audience** with employee work email addresses. For help, see the [Targeted Audience Setup Guide](#).*

Ready to begin? Read on...

Summary: Working with Automatic Email Delivery

GuideSpark uses a secure Email Service Provider (ESP) to ensure that emails get delivered quickly and reliably. Although all of the data is generated and handled by GuideSpark, the ESP handles the final delivery and manages the reputation and infrastructure necessary to get Enterprise-scale email delivered with secure authentication. Our relationship with the ESP is similar to using an Internet Service Provider to access the Web.

Customers typically want email sent to their employees to look as though it came directly from a sender within their company. To manage this such that emails do not get blocked or seen as spam, we work with your IT organization to provide the info needed. IT organizations at larger companies are usually familiar with this process, which involves adding a DKIM DNS entry and usually whitelisting the ESP's IP address.

i *Automatic Email Delivery is only used for transactional emails, sent from someone at your company to your company's own employees. By default, we do not allow emails to be sent to a different domain than that of the sender. If your company has subsidiaries and you need to send from one sender (e.g. *hr@example.com*) to employees in a different domain (e.g. *employees at test.com*), contact your GuideSpark CSM and we can accommodate your specific needs.*

What your IT department needs to know

GuideSpark email will be sent on your behalf from a sender at your company, using a “From” sender name and email address of your choice, to your company’s employees. This requires your IT department’s help, so that your email server will see the incoming email as legitimate rather than a spoofing attempt. The summary info needed to get started is on the last page of this Guide.

Every company’s email and security settings are different, but here are the basics:

1. You will need to add a **DKIM** DNS record to your company’s domain. After the initial setup in your Campaign settings, contact your GuideSpark CSM so we can generate these values. They will be specific to your company’s domain.
2. If you are concerned about modifying your primary domain’s DNS record, you can **set up a subdomain** to use as the sender. We can send from *subdomain.example.com* to your employees at *example.com*.
3. If you use a spam filtering service, make sure our IP ranges are whitelisted and **rate limiting is disabled** for those IP ranges. (Otherwise, test emails will pass but large employee lists will fail.)
4. IT may need to **whitelist the Outbound SMTP Server IP address ranges** that our email service provider uses to send email, to further ensure inbox deliverability. Whitelist these ranges:

```
50.31.156.96/27 (50.31.156.96 - 127)
104.245.209.192/26 (104.245.209.192 - 255)
```

Set a custom Return-Path, for companies using DMARC

DMARC lets you tell ISPs how you want them to behave if SPF and DKIM fail or are not present. A custom Return-Path isn't required and shouldn't affect deliverability in most cases, but if you already have a [DMARC policy](#) for your domain you should set up a **custom Return-Path** to achieve full [SPF alignment](#). The Return-Path used by Postmark (GuideSpark’s email service provider) is <pm_bounces@pm.mtasv.net>

For a custom Return-Path, create a CNAME record in DNS:

```
Record type:  CNAME
Host:         pm-bounces
Value:       pm.mtasv.net
```

Let GuideSpark Support or your CSM know **the alias** you used in your CNAME record (for example, pm-bounces.example.com), so that we can finish setting up and verifying your custom Return-Path.

For best results, enable remote image loading

Some email systems prevent remote images from loading, lowering communication effectiveness. We recommend removing this limitation for the Sender address(es) used with Communicate Cloud. The specific steps for doing so depend on corporate email systems and employee email clients, and are beyond the scope of this Guide.

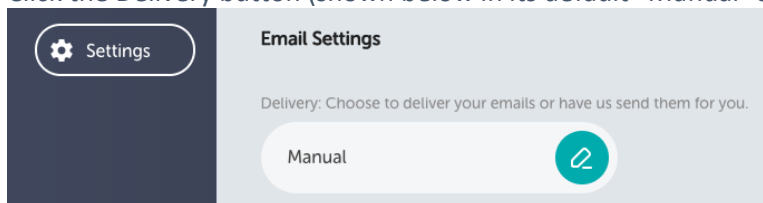
Prerequisite: Select a Targeted Audience

Before using Automatic Email Delivery, you will need to select a **Targeted Audience** for your Campaign, to define the audience to whom your messages will be sent.

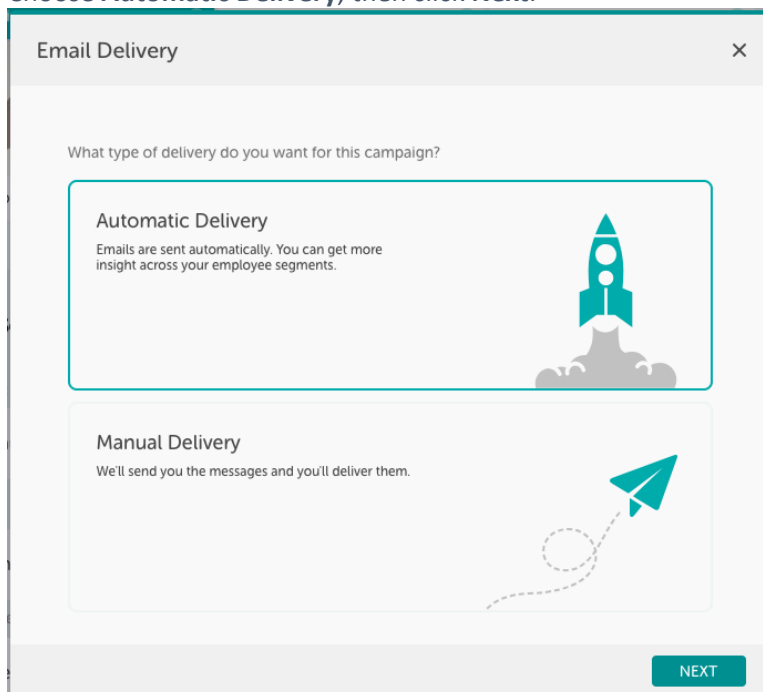
- In **Settings > Audience**, you can upload employee information including email addresses to create a Targeted Audience for your campaign. This information is only used to send your reach messages to your employees. For help, see the [Targeted Audience Setup Guide](#).

Enable Automatic Delivery in Communicate Cloud

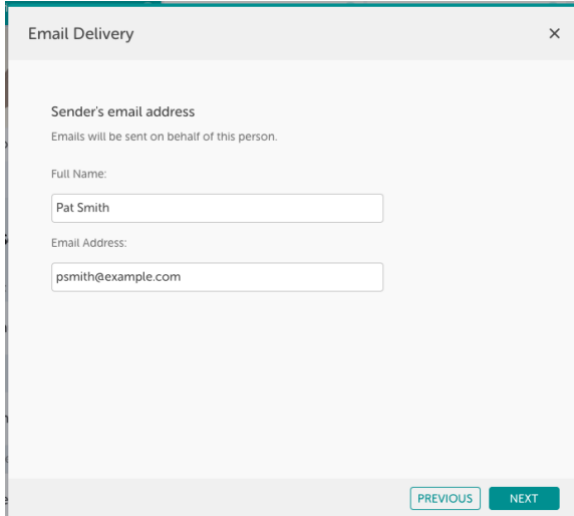
1. Open your Campaign. Click **Settings**, then scroll to the **Email Settings** section.
2. Click the Delivery button (shown below in its default “Manual” setting).



3. Choose **Automatic Delivery**, then click **Next**.



- Specify the full name and email address of the Sender for this campaign's email messages. The Sender must be a person or an email alias at your company. When you click **Next**, the Sender will get an email from our email service provider, Postmark, asking for approval to send email on their behalf.



Email Delivery [X]

Sender's email address
Emails will be sent on behalf of this person.

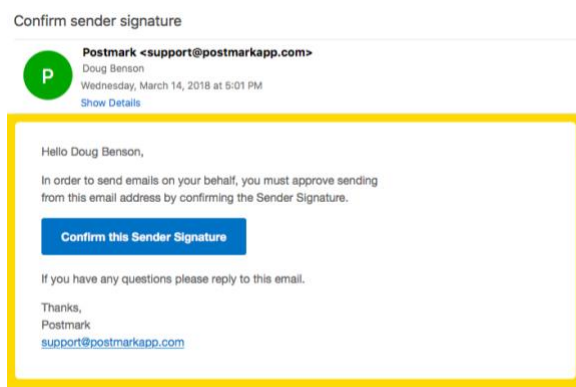
Full Name:

Email Address:

[PREVIOUS] [NEXT]

i Reply emails will go to the Sender. If you need replies to go to a different address, let us know the Reply-To address to use.

- Let the Sender know to expect this email!** The sender must **click the Confirm button** in Postmark's confirmation email. They only need to give permission once; they won't need to do it again if you use the same Sender in other Campaigns.

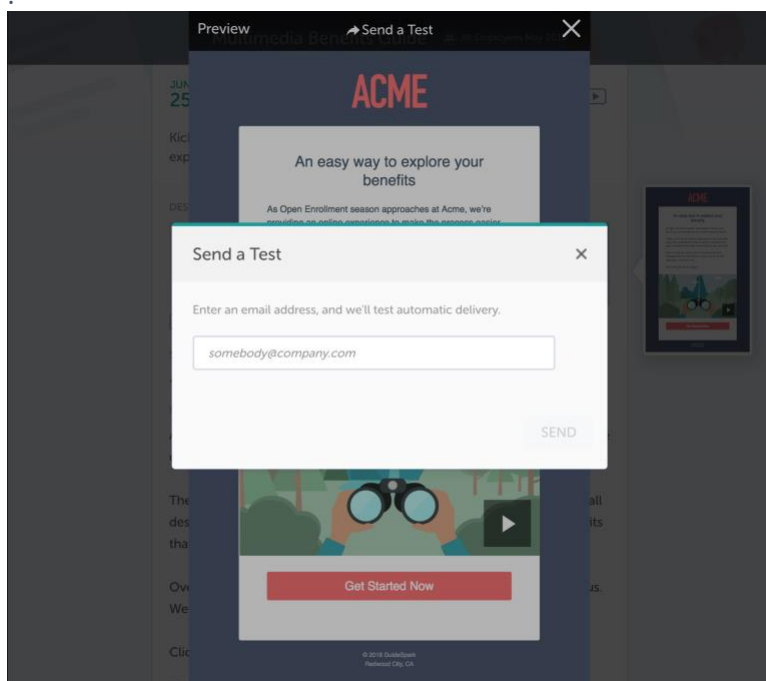


i After you set up Automatic Delivery for your campaign, you can switch back and forth between Manual and Automatic Delivery at any time, without needing to redo your setup steps. You can also edit the Automatic Delivery settings to change the Sender if needed.

Testing Automatic Email Delivery

Before you send email to a large audience at your company, it's important to run through a set of tests to make sure that emails will get delivered to employees.

1. In the Timeline, click the preview for an email, then click **Send a Test**. Enter an email address *for someone at your company* then click the **Send** button. Send to yourself or your IT



i *If you are not prompted to enter an email address when you click Send a Test, then Automatic Email Delivery has not been enabled for this campaign, or the Sender has not yet responded to their confirmation email.*

2. See if the email was received. If the email is not received within a minute or two, contact support@guidespark.com so we can check if the email was rejected by your company's email server.

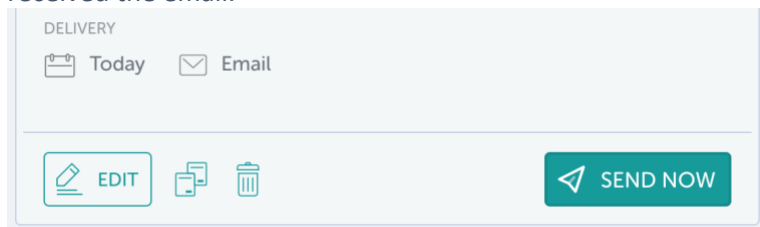
Having this test email rejected just means that we need to work with your IT department, since email system setup can vary widely between companies.

3. If the email was received, look over it carefully to see if it was marked by your email system as possible spoofing or sent “via pm.mtasv.net”. If the *from* address looks incorrect, or the email ended up in your Spam folder, your IT department will need to be involved.

Do a larger “real-world” test

If there are no problems found, then we suggest doing a wider test.

1. Create a test Targeted Audience using a filtered subset of a handful of employees (for instance, a few employees in HR or IT with whom you can coordinate). *We recommend creating a specific audience such as “Test Audience” so you don’t send your test to the wrong list!*
2. Create a test email on the timeline. You can use an external destination (e.g. your company’s website, or *example.com*) if your Library content is not yet Published.
3. Change the test message’s delivery date to Today, and save the email. Click the **Send Now** button to send the test email immediately. Contact the members of your small test audience to check that they received the email.

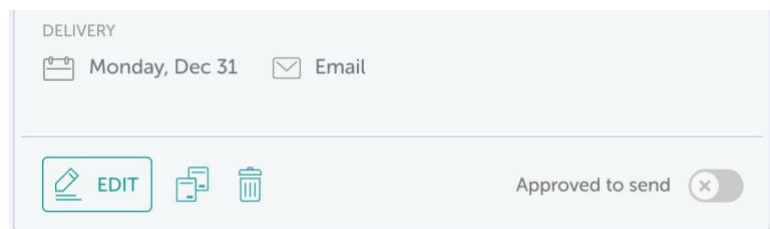


4. **Important!** Look and ask questions carefully, to make sure that all of these are true:
 - Emails reached everyone in the test audience.
 - All emails went to the employees’ primary Inbox, not spam or any alternate Inbox.
 - Emails are displayed as coming from the Sender, without any “sent on behalf of” or “[EXTERNAL]” text, and without any cautionary language or banner added to the top of the email.
 - Employees don’t have to click a button to load images in the email. (When image loading requires additional action by employees, communication is less effective.)
 - *If any of these tests fail, it’s generally a sign that additional steps are needed by IT.*
5. If all emails were received properly, congrats! In **Settings > Audience**, switch to your desired Targeted Audience, and you’re done.

Approving individual messages for automatic delivery

Once you have chosen an audience and enabled Automatic Delivery for email, scheduled emails will be delivered directly to your audience. You and other notification recipients will receive a reminder to approve or hold the emails, so don't worry: we won't send email out to an audience unless the message has been approved.

For messages set for automatic delivery to a Targeted Audience (either direct emails, or text messages), the Timeline will show an **Approved to send** toggle at the bottom of the message:



The message will only be sent if **Approved to send** is enabled, but it's a flexible system: You or your CSM can approve messages at any time before the delivery date.

Approving or Holding messages via email

Several days before your direct message is scheduled to be delivered, a reminder email will be sent to the *notification recipient(s)* set up for your company. With a single click, a notification recipient can Approve or Hold the message without needing to log into Communicate Cloud.

If you **Hold** the message, the Approved to send toggle will be turned off, and the message will not be sent. You can edit the message at any time, approve it, and reschedule it for a future date.

Automatic Email Setup Worksheet

This is a summary of the setup info needed for Automatic Email Delivery.

Name to show for the Sender:

What name should we show in the email for this sender? This can be a person, like “**Mary Smith**” or a general name like “**HR Team**” or “**Benefits**”.

“From” email address:

What email address at your company should we use for the “From” address in your direct emails? This can be an alias such as **benefits@example.com** or a special subdomain like **benefits@hr.example.com**. *A single-click confirmation email will be sent to this address.*

IT contact email address(es):

Successful implementations require working directly with someone in your IT organization, to ensure that your email setup is working properly.

(Optional) Reply-To email address:

(Optional) When employees reply to the email, where should the reply go? If you want the reply to go to a different email address than the “From” address, enter it here.

(Optional) Other employee email domains:

(Optional) If you have employees at domains other than the Sender’s domain, such as subsidiary companies, let us know. By default, our system is set up to only send email to your domain (or its subdomains), but we can override that as required.