



Social Good

Software

How to create an automated email

- Write your email with Google Docs
- Create a sales order query with Altru
- Design your email with Social Good Software
- Schedule your email to go live

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Write your email with Google Docs

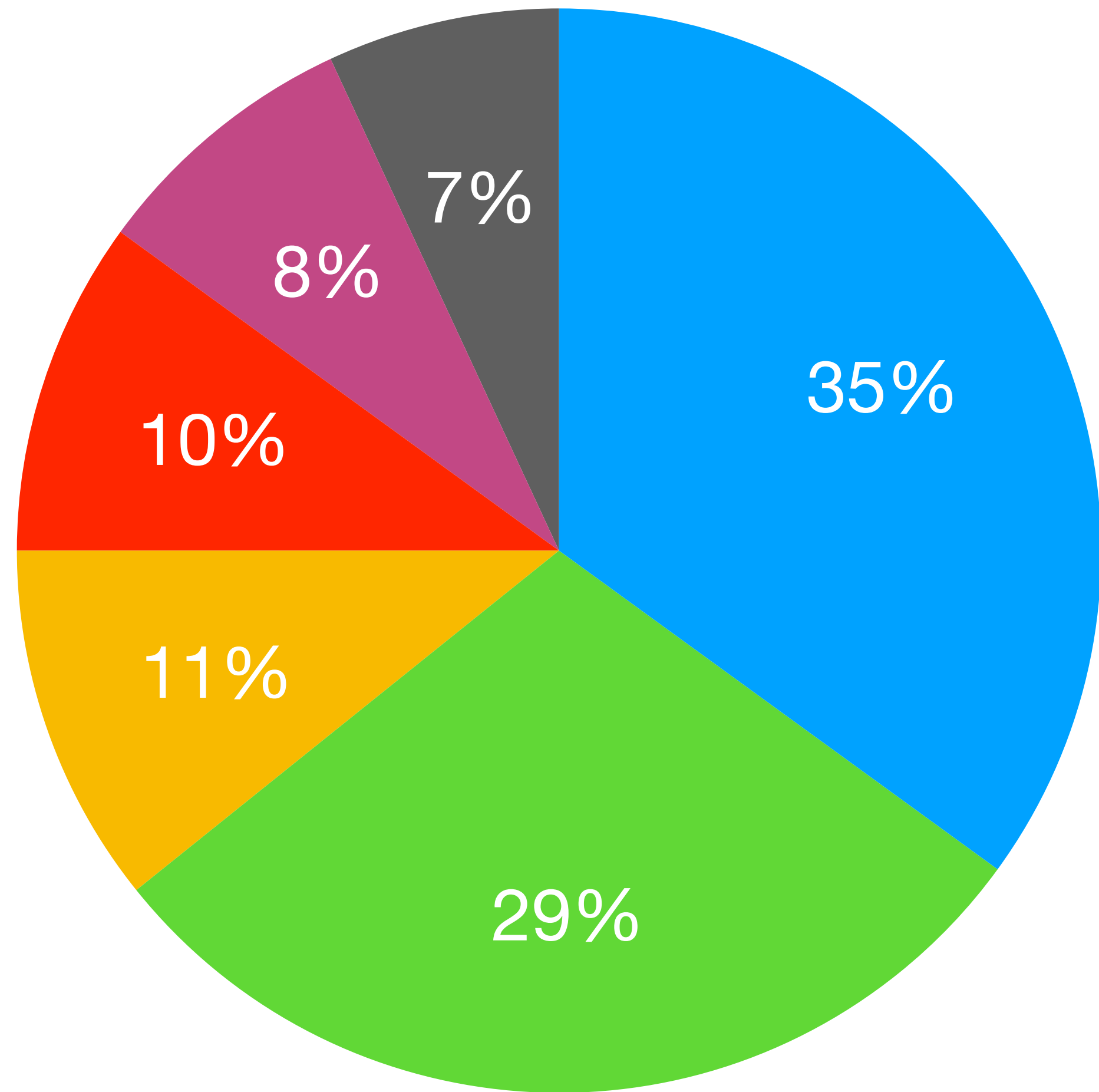
- Write your email with Google Docs
- Write the email as if you had all the information you need
- Find any assets you would like to include in your email such as links and images

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How to create a sales order query with Altru

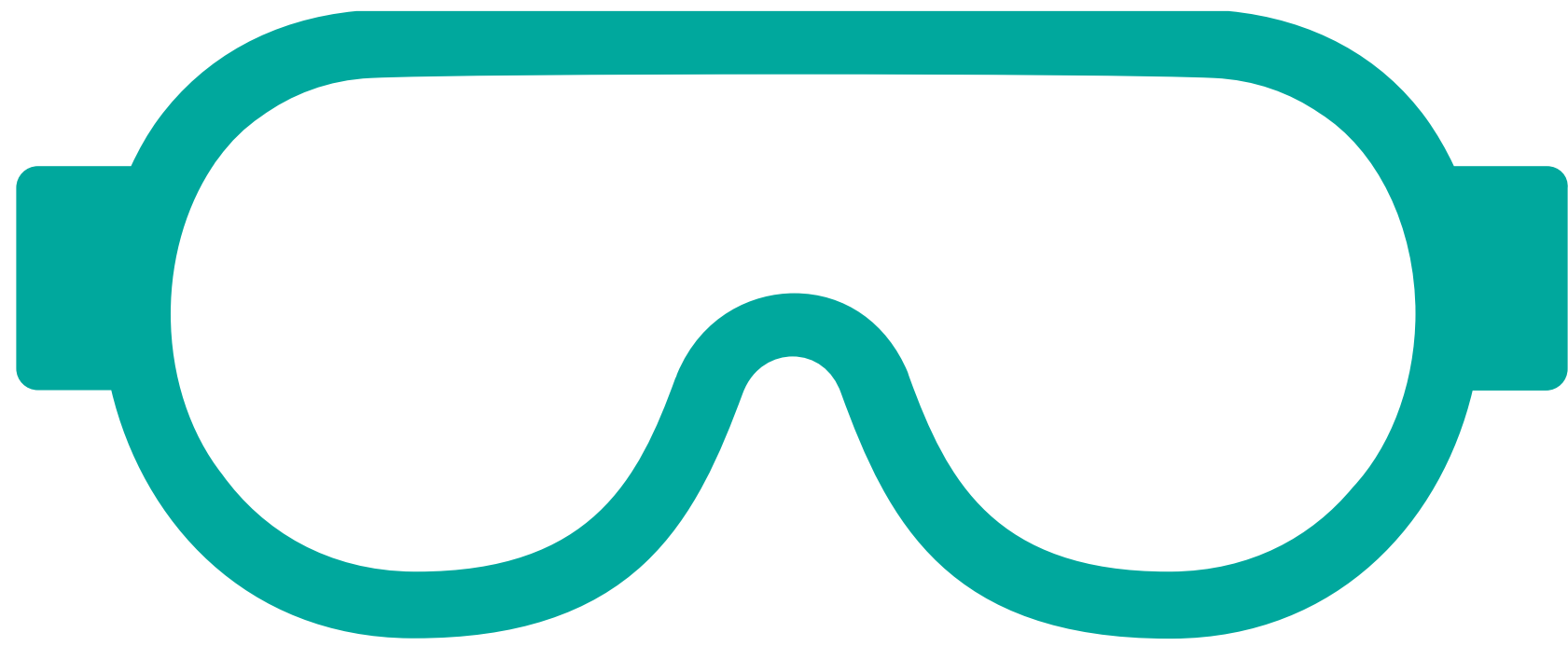
- Start with your questions?
- Create your queries with Altru
- Create a sales order query with Altru

Start with your questions?



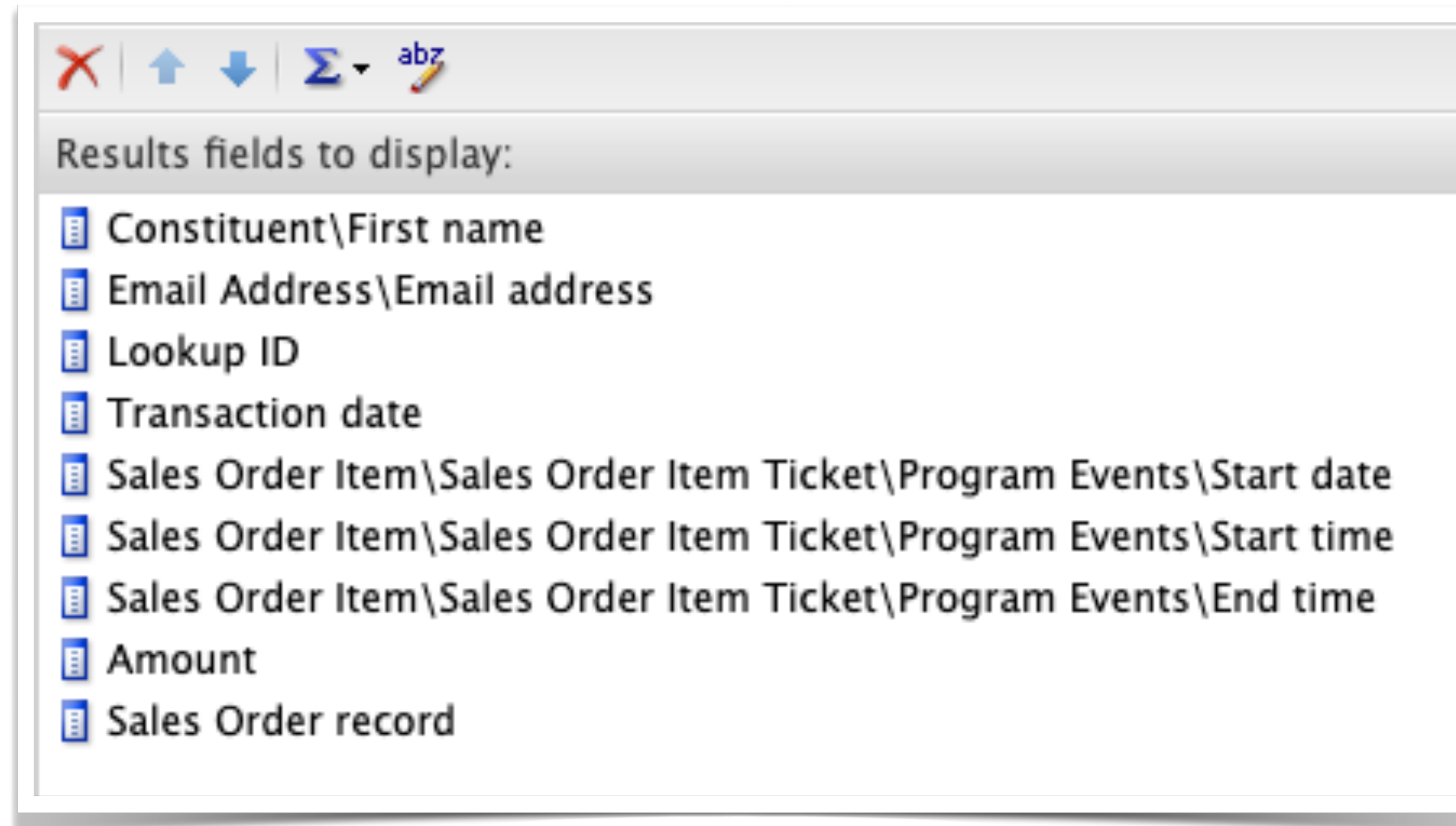
- Take a few minutes and define the questions you want to have answered
- Think about the data you will need and how you would like that data to be presented
- Work through any joins or exclusions on paper before writing queries

Write your queries with Altru



- Convert your ideas from paper to a query with Altru
- It's ok if you need to create multiple queries you can always join them together
- Be patient as you find the fields you are looking for
- Start with one row and make sure it matches your expected output
- Test and test and test some more

Create a sales order query with Altru



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Create a custom Note Type

- The Note Type is used as a reference point to proof of the email being sent
- Allow us to not double send emails to the same person
- Administration => Code tables => Tickets => Sales Order Note Type

Design your email with Social Good Software

- Have your domain name verified
- Have the title of the email ready to go
- Have the from and reply to address ready
- Have a Note Type defined
- Have your email written
- Have all your assets exported out of Google Doc

Migrate over content from Google Docs

- How to add a header image?
- How to add content to the email?
- How to add links to the email?
- How to add eTicket link to the email?
- How to add variables to the email?
- How to add social media icons?
- How to add a footer image?
- How to add a footer section?

Schedule your email to go live

- Test the email and make sure you like it before you enable it
- Adjust the Query for your go live date
- Click on the “Start sending emails?” Option in the settings

Thanks for watching!