Sending Profiles

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Introduction

The sending profile feature provides a way for Total Expert users to mask the sender of selected emails that have been triggered by a journey or campaign. This means you can deliver an email to certain recipients and have it appear in their inbox as if it had been sent by someone other than the user running the journey or campaign, giving a greater sense of human connection or providing branded communication at appropriate times.

For tracking and statistics puproses, a sent email that used a sending profile is treated as having been sent by the user running the journey or campaign. This allows the user to see all the effects of their marketing. On the recent activity item recorded for a contact, an email that used a sending profile is indicated as such and includes the information from the profile that was used so the user can see what appeared in their contact's inbox.

> **Tip**
> Because a the sender information is only masked, and the email is treated on the back end as being sent by the user running the journey or campaign, an email template will still populate that user's information if there are any user-related placeholders in the template. Therefore, when using a sending profile, you should only select an email dedicated for the purpose with a footer hardcoded to match the information in the profile.

> **Note**
> There is some possibility that messages masked with a sending profile could be flagged by spam filters. However, as long as the sending domain used in the profile setup was properly configured with SendGrid during Total Expert implementation, this effect should not be any more likely than sending other email from Total Expert.

Creating a New Sending Profile

You can set up as many sending profiles as you like for your organization.

1. Navigate to **Email Marketing → Sending Profiles**. This page lists all the sending profiles created in your organization.

2. Click the **+Create** button.
3. In the Create Sending Profile box:
    a. In the **Name** field, enter an identifying name. This is the name of the profile itself that is displayed anywhere in the Total Expert platform.
    b. In the **From Name** field, enter the name you want to appear in the From field in a recipient's inbox when they receive a message sent with this profile.

> **Tip**
> This might be the name of an individual, the title of a person in a certain role (such as CEO of Example Bank for welcome emails), or a branding entity (such as Example Bank Newsletters).

    c. In the **From Email Address** field, enter the address you want to appear in the From field in a recipient's inbox when they receive a message sent with this profile. Together with the From Name you entered above, this will determine where the message appears to be coming from.
    d. In the **Reply To Email Address** field, enter the address you want to appear in the Reply-To field in a recipient's inbox when they receive a message sent with this profile. If the recipient attempts to reply directly to a message sent with this profile, their message will be routed to this address.

> **Tip**
> If replies are not monitored for messages sent with this profile, enter a placeholder address, such as noreply@example.com. Be sure to include some language in the email itself stating that replies will not be read.

> **Note**
> Both the From Email Address and Reply To Email Address must use a domain registered with your organization in Total Expert. You will not be able to submit the form with invalid domains. *This check is case-sensitive*; for example, totalexpert.com and TotalExpert.com would be treated as separate domains.

    e. Click the **Submit** button.

The list refreshes to include the sending profile you just defined.

Managing Existing Sending Profiles

Updating a Profile

1. Navigate to **Email Marketing → Sending Profiles**.
2. For the profile you want to update, select **Actions → Update**.
3. The Update Sending Profile box appears. This box has the same fields as the Create Sending Profile box and is pre-populated with the information defined for the selected profile. Update the information as desired and click the **Submit** button.

The list refreshes to show the updated information. Subsequent emails using the profile are sent using the updated information.

Deleting a Profile

1. Navigate to **Email Marketing → Sending Profiles**.
2. For the profile you want to update, select **Actions → Delete**.
3. Click the **Delete** button in the confirmation box.

The sending profile is removed from the list.

> **Warning**
>
> If you delete a sending profile that is applied to a journey email action or a campaign email, any subsequent messages sent by the affected journey action or campaign email will use default behavior instead, meaning they will appear to come from the user running the journey or campaign. Ensure that the profile is not being used or has been replaced by a different profile before deleting it.
>
> Emails sent by other journey actions in the same journey or other emails in the same campaign are not affected (as long as their sending profiles are intact or they do not use a sending profile).

Applying a Sending Profile

You can apply a sending profile to an email sent via a journey or a campaign. You cannot apply a sending profile to an individually sent email.

In a Journey

When setting up a journey component to send an email, you can select which sending profile (if any) is applied each time that component sends an email. Any emails sent by other components are not affected; they could also use a sending profile, but you would need to configure the desired sending profile for each component separately. You cannot apply a sending profile to an entire journey at once.

While building a journey:

1. Add any component to the canvas that sends an email, such as **Send Email** or **Send User Notification**.
2. Hover the mouse pointer over the component and click the **Edit** button.
3. In the Event Parameters section of the slide-out panel:
   a. Click **Select email** and select an email from the gallery.
   b. Click the **Sending Profile** field and select the desired profile from the drop-down list.
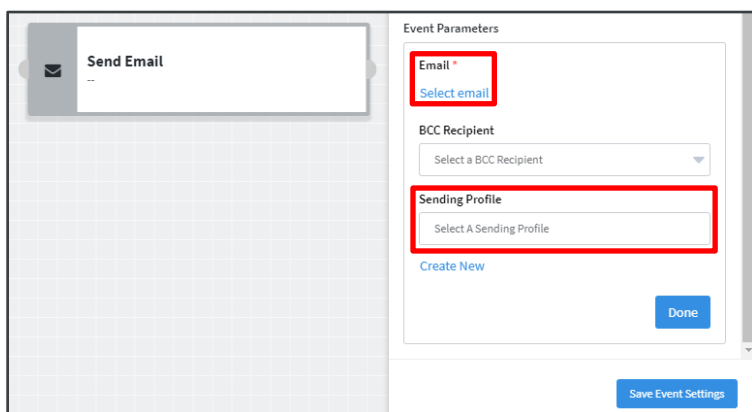
> **Note**
> You can create a new sending profile on the fly by clicking **Create New** below the Sending Profile field and filling out the Create Sending Profile box the same way you would when creating one via the Sending Profiles page.

      c.   Click the **Done** button.

4.   Click the **Save Event Settings** button at the bottom of the panel to confirm changes to the component settings.

The journey must be completely configured and published before any contacts can begin receiving the email using this profile.

In a Campaign

When setting up a campaign to send an email, you can select which sending profile (if any) is applied to each recipient when a scheduled email is triggered. Any other emails sent by the campaign are not affected; they could also use a sending profile, but you would need to configure the desired sending profile for each message separately. You cannot apply a sending profile to an entire campaign at once.

While building a campaign:

1.   On the Content tab of the campaign builder, click the **+Add** button in the Email section.
2.   Select an email and click the **Add** button in the gallery. The message you selected is added to the Email section.
3.   Click the **Edit** button (pencil icon) for the new email.
4.   In the slide-out panel, click the **Sending Profile** field and select the desired profile from the drop-down list.
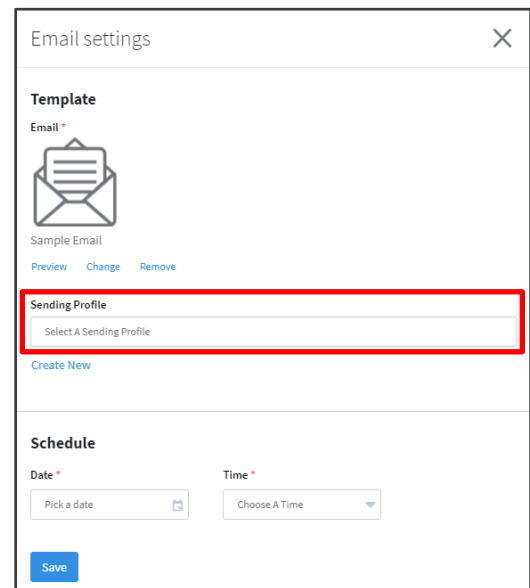
> **Note**
> You can create a new sending profile on the fly by clicking **Create New** below the Sending Profile field and filling out the Create Sending Profile box the same way you would when creating one via the Sending Profiles page.

5.   Select the **Date** and **Time** the email should be sent.
6.   Click the **Save** button at the bottom of the panel to confirm changes to the email settings.

The campaign must be completely configured and running before any contacts can receive the email using this profile.

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