Getting Started Guide for Section Email

- Login with your SPE credentials
- Must have Java downloaded on your computer

Home Screen

1. Prepaid block
   a. This indicates the number of emails you were allocated and when they will expire
   b. Note that an email is counted as each individual who receives a message (ie. If you send a message to 200 of your members, you have used 200 emails.)
2. Snapshot report of mailings sent by the officers of your section

Create a Mailing

1. Go To Mailings > Create > Mailing
2. Set-Up tab
   o Name the email you are preparing (ie. June Monthly Meeting Notice)
   o Assign it to a folder or create a new folder. (ie. Monthly notices / YP / Social Events)
   o Select a Template
     ▪ Template 1 is basic email
     ▪ Template 2 is a newsletter
   o To:
     ▪ Select option 1 “Select a target group for the entire mailing”
       - More training on targeted messaging coming soon...
     ▪ Select Personify MKT Lists
     ▪ Select the list you need
     ▪ Click on Get Count to see how many are in this list
   o From and Reply To are prepopulated; do NOT change
   o Enter a subject for your message
   o SAVE

3. Move to Design Tab
   o Click Create Story
     ▪ Use the wand icon to add a story layout to the mailing.
     ▪ Use the icon with 2 people to insert personalization fields – this will insert Customer data from Personify at the time the mailing is published.
     ▪ Use the icon with the globe and the link to hyperlink text.
     ▪ Use the icon to upload an image.
   o Preview the mailing by clicking Preview button
   o Email a test mailing by clicking Email to Me button

4. Move to Test Tab
   o Click Hyperlink Test.
   o Optional: Virtual Inbox Test. (This can take a few minutes to run.) Virtual Inbox Test allows you to see how the mailing will render in various email clients.
Getting Started Guide for Section Email

5. Move to Send Tab
   o Choose Send Mailing Now or Schedule Mailing

Mailing Reports

1. From your home screen, select your mailing
2. Snapshot shows simple delivery and open rates
3. Review the Key Metrics for more details on delivery and open rates
4. Details tab contains a lot of specifics on opt-outs, click rates, etc.
   a. You should NOT need to review this tab unless you are having deliverability issue
   b. If you are having a deliverability issue, please email sections@spe.org