How to send a One-Time Custom Email:

› In order to create a new One-Time Custom Email, select the option on the Email Marketing homepage or from the dropdown Email menu:

Building a One-Time Custom email is made of seven steps, visible in the checklist on the left of the screen.

1. Email Details
2. Choose Template
3. Build Content
4. Send Preview
5. Choose Recipients
6. Schedule Email
7. Release Email
This window is broken down into three sections. By default, most fields are pre populated with your email address and name.

**General**

- **Email Name**: Enter a name describing the email. You can also include the date, to help other administrators or yourself to retrieve this email easily. This will not be the subject line of the email.

- **Email Description**: Similar to the name, this is not seen by recipients, and is up to you to decide what information you want to list here.

- **Email Category**: Choose the appropriate category from the dropdown list. The category is linked to the opt-out option. Recipients will be able to unsubscribe from emails of this category from your community, or from all
emails from your community with an *unsubscribe* link placed at the bottom the email.

**Notification Email:** Email address to which a notification will be sent when the email has been sent to recipients. This field is optional.

**From Name:** Name displayed as sender when the message is received by the recipients. It is better to have the From Name and the From Email reference the same person (e.g.: Janice Murphy-Wallace / Janice.wallace@yale.edu).

**From Email:** Email address displayed when the message is received by the recipients.

**Reply To:** Email address that will receive replies when recipients use the Reply to function.

**Subject:** Contains the name of your sub community in brackets, by default. You don't have to use this default subject. You can create your own subject line (i.e. Message from the Dartmouth Club of the Upper Valley) or you can use tokens from the dropdown list. Tokens are bits of information that will be personalized for each recipient (first or last name, etc.) Tokens work if you upload IDs or use the built-in Data Viewer.

**Pre-header:** Short summary of the email that is used by email clients when displaying a preview. If let blank, the beginning of the message text will be used.

It is recommended to use a custom Pre-header when using the View Email in Browser option (see below), as the link will be used as Pre-header if left blank (first text in the email).

**Content**

**Email Footer**

Email Marketing Emails

**View Email in Browser**

Automatically include a link to allow constituents to view this email in their browser

Link Text:

View this email in a web page
**View Email in Browser:** Adds a link at the top of the email to allow recipients to display the email in their Internet Browser. If you leave the box checked, you should setup a Pre-header (see above) with custom text. You can also choose the text displayed as link to the browser version of your email.

Once you are done, click **Save & Continue** to move on to the next step. If you click **Done**, your changes will be saved and you will be redirected to the Email Marketing Homepage.

**CHOOSE TEMPLATE**

› Select Mobile Ready 2 Column w/ Header & Footer layout, and then the email design template Newsletter 2017. You do not have to use the template.

› Click **Save & Continue** to move on to the next step.
› Once your template is loaded, you can start building the content of your email.

› You can rearrange the blocks of content with the icon. You need to click and drag the block of content to its new position before releasing the mouse button.

› You can delete a block of content with the icon.

› To edit a block of content, click on the icon. In the pop up window use the icon to edit the default version of the content previewed on the right. You should only use the Default for everyone version of the content, as displayed on the left.
You can start editing/typing text.

You can use **tokens** in the body of your message (First name, Last name, etc.)

**IMPORTANT:** when adding hyperlinks, never attach a link to a full URL into the text, as this can cause some recipients’ spam filters to reject the email. Use instead the hyperlink manager and a placeholder text for the URL you want to link, or type in the full URL without attaching a link to it.
SEND PREVIEW

› iModules requires you to send a preview of your email before you can "release" it to be sent at the chosen date and time.

Reply-to Address:
By default, when replying to this preview email, you will reply to the address specified in the Email Details. You can change this here to enter a substitute email address that will only be in effect for the preview email.

Add Recipients:
By default, your email address is already entered as recipient of the preview email. You can add more recipients by typing in their email address into the box, then clicking Add.

Additional Comments:
If you choose to enter comments, they will appear directly before the body of the email you are sending, stripping out all formatting of the comments.

Save as Design Template:
You have the option here to save the email you built (choice of template as well as content). Check the Create a Design Template based on this email checkbox to save it. It will appear in the Templates under the same layout as the one used (here: Single Column).

› If you realize that your email needs more work, you can click on the step you want in the Email Checklist. Every time you make a change, you should send a new preview before releasing the email.
CHOOSE RECIPIENTS

› iModules offers different ways to choose recipients, but Data Viewer is the preferred method.

>&gt; CHOOSE RECIPIENTS

![Email Checklist]

Email Checklist

- Email Details
- Choose Template
- Build Content
- Send Preview
- Choose Recipients
  - Schedule Email
  - Release Email

![Data Viewer]

Data Viewer is not currently in use for this recipient list.

Configure...

![Custom Lists]

Custom Lists

No Custom Lists have been selected.

Configure...

![Email Address File]

Email Address File

No file of email addresses has been uploaded.

Configure...

Total Estimated Recipients: 0

- Cancel
- Back
- Save & Continue
- Done

› Click Configure and a pop-up window will open.

Email Recipients - Build Mailing List

- Include all records
- Create a new query
- Use a saved query
- Use a criteria template
- Upload Advanced ID Number .csv/Excel file
- Include Privacy Protected Records

Next>

› If you want to send an email to all members of your class/club, you can use the Include all records option and click Next. This will also include guest members of your sub community.

⚠️ This will include all records in your community including guest members. Guest members are created when an email address that is not in your sub community is either added to a custom lists, uploaded in an Excel file, or used for an Event Registration (e.g. Reunions).

› If you want to send an email to all members of your class/club excluding guest members, you can
use the **Use a saved query** option and click the **Run Query** icon next to the **Community Members (Excludes Non-Members)** saved query.

You can also choose to upload Advance IDs. You should then select **Upload Advance ID Number .csv/Excel file**, click **Browse**, and select your file. Your file should contain only the Advance ID numbers with all leading zeroes (ten digits), either in a .csv or an .xls/.xlsx format. It is recommended to use the .csv format.

⇒ To learn more about uploading Advance IDs, click here.

Note that the estimated number or recipients will probably be different than the count you have if you upload a file. This is due to the members with a bad email address, no email address, or who opted out of all communications.
You can see the actual list of recipients and their email addresses by clicking on the 📥 icon next to your email on the Email Marketing Homepage, and choosing Recipient List.

SCHEDULE EMAIL

You can select the date and time your email will be sent once released. iModules emails are sent on the hour. Note that it can take up to 30 minutes for the message to actually send depending on the number of messages already scheduled for that time by Dartmouth and other organizations/schools.

RELEASE EMAIL

You have the option to review some final details about your email before releasing it.

Once you click Save & Continue or Done, your email will be moved from Drafts to Released Emails and will be sent at the date and time scheduled.
To edit the email, you have to move it to Drafts by clicking on the gear icon and selecting **Move to Drafts**. You will need to go through the previous steps of sending a preview and scheduling the email in order to re-release it.