How to Create a Mailing

- Email / Manage / Mailings and Templates

- Check the box next to the template named FORDHAM MASTER TEMPLATE and click Copy
• Name your new mailing name (Tip: Begin the name with the date format YYYYMMDD for easy sorting)
• Click upon your new mailing name to open the editor
• Select Mailing Settings and enter your Subject Line

• Enter Address Settings (From Name, From Address, Reply-to Address)
  o Requirement for the From Address: Use @crm.fordham.edu in place of @fordham.edu (e.g., hr@crm.fordham.edu in place of hr@fordham.edu); this is needed as IBM Watson will send the mailing from crm.fordham.edu, which is the registered and approved subdomain.
  o Best practice: Reply-to address should be a valid email address. For the reply-to, use the @fordham.edu address (e.g., hr@fordham.edu)
• Select Contacts to choose a Contact Source

- When you click on the Select Contacts button, you will be prompted to enter a type of Contact Source. Click upon the drop down arrow to see your choices. You may choose a “Contact List” or a “Query” from the drop down to enable access to pre-built lists.
- A Contact List is a static list of email addresses that may have been uploaded earlier via the import feature. You may have the ability to create Contact Lists if you have access to “import”.
A Query is a dynamic list that is kept up-to-date based upon its parameters (e.g., a query may be created to show all students with a student status of ‘active’ at any point in time.)

- If you would like to select from a list of pre-defined queries, you may choose from the queries found in the Master Groups subfolder or any queries that available to you in your department folder as follows. Select the query from the list provided in the subfolder, and click ‘done’.
• Email Settings – leave default settings at left alone; at right, you may enter keywords as ‘Tags’ to categorize your mailing (e.g., test, enrollment, graduation, IT, etc.) for advance subsequent searches, etc.

• Replace the default text shown below with your content.
• If you need more structured content, click the Asset Library Icon and select Load from Asset Library.

• Select HTML Elements to pick from a list of pre-created content blocks.

• If you would like to insert an image from your desktop, click on the blue ‘insert image’ icon and click upload image.
Note: You may resize the image by changing the Width above and the Height will auto-adjust; otherwise, you may change the Height and the Width will auto-adjust.

- The image is responsive, and it will maintain its original aspect ratio by default. The ‘lock’ image to the right of the Width identifies that the aspect ratio is locked.
- If you would like to alter the Width as well as the Height, click upon the ‘lock’ image to remove the aspect ratio lock first.

- Once you have inserted the image from your desktop as above, click ‘OK’ to continue.

As you work in the template, you will see the ‘Editor View’ by default.
• Click Preview button (eye icon at top right) to see template formatted for Desktop, Mobile or Tablet view.
• When you are done entering and previewing your content, click ‘Save’ at the top

• If you’d like to make a copy click upon the drop down to the right of ‘Save’, and click ‘Save As’
• Click ‘Quick Test’ to send a test to your email address. You may enter more than one email address delimited by commas.
• A test email will be sent to the entered email address. The subject will have a preface of ‘Test –’, and email body will state that ‘You are receiving this email as a test mailing’.

- Click ‘Close’ to close the Quick Test box. If the test is successful, click ‘On To Send’ at top right to prepare the mailing for distribution.
In the Contact Summary section, the contact source size will show the number of email addresses in the contact source that you entered above. (The sample below shows 1 email address.)

Click the ‘refresh’ icon to the right of the ‘contact source size’ value in order to get an updated Estimated Send Count.
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- Click Continue to Finalize Your Mailing, Check Mailing Health, Schedule, Confirm and Send.

- You may schedule the mailing for immediate distribution by selecting ‘Send Now’ as below. Otherwise, you may click ‘Schedule’ to set a date and time for mailing distribution.
• After you identify the schedule type above, you will see the final confirmation page.
• Click ‘Send now’ to distribute the mailing. Note that if you have approval access, the email distribution will be sent automatically. However, if you do not have approval access, the designated approver for your department will need to approve the mailing before it can be distributed.
• Click on ‘Sent Mailings’ to see recent mailings.

• See your mailing list at the top in the Sent folder
• Scroll to the right to see “Opens”, the percentage of email addresses that opened the email.

• Click Reports / Report Center / Single Mailing Reports Summary for more information about the status of your mailings.

• See Mailing names, Sent Date for each, along with ‘Unique Open %’, ‘Unique Click %’, etc.