Create and Send an Email

1. Identify the type of email you need to send.
2. Right click on the template and “clone”

3. Use this standard naming convention – **Group Name** – **YYYY-MM-DD** – **Email Description**
   - Clone to “a campaign folder”
   - Choose your email folder

4. Click “CREATE”
5. Select and right click the email to be edited and sent.

6. Now that you have completed your email edits send a sample of the email to yourself and any other identified leaders to ensure it looks as expected.

7. From the main Email Program tab, you can see the number of people in your audience to receive the email by clicking the refresh arrows.
8. Choose the approved email you edited earlier in the email tile.

9. Schedule the email to be sent by defining a date and time under the Schedule tile.
10. Under the Approval tile click on Approve Program.

11. If issues exist they will be noted for you to address before approving again.

Perfect! You are done. Your email will go out at the scheduled time.