

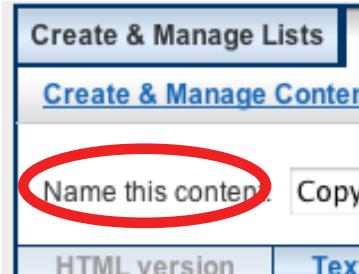
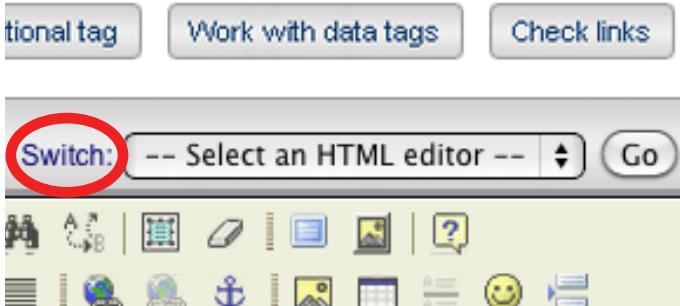
**WELLESLEY**  
ALUMNAE ASSOCIATION



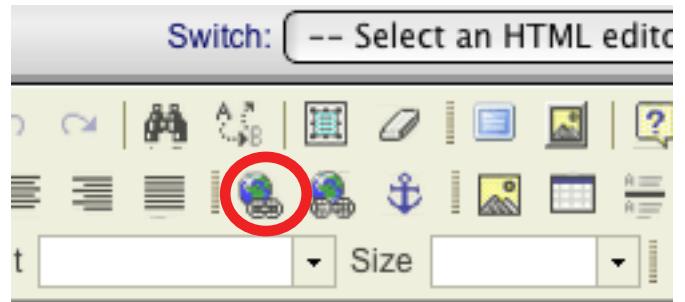
Wellesley College Alumnae Association

Volunteer Instructions for  
Email Template

## Instructions: Sending an Email in Harris

1. Log into Harris, using your username and password
  - If you do not remember your username/password, please call 781.283.2331 or email alumnae@wellesley.edu
2. In the top of the page (gray navigational bar), please look for “Email Marketing.” Hover your mouse over that link. A drop-down menu will appear, please click on the 2nd item, titled “Create/Manage Email Content.”
3. Look for your class/club/group email template. Look to the right, under the “Action” column, click on the “Duplicate” link.
4. A new webpage will appear. under “Name this content,” please enter in a title of your email. For example “1958 Reunion Financial Aid Email.” Please include your class/club/group name in this title. This name will not be displayed anywhere in your email—it is only for documentation purposes in Harris.
5. Look to the right of your screen. In the gray bar is a section called “Switch.” Please select “Default HTML editor” and click on “Go.”
6. Enter the appropriate text inside the brackets. For example in the header “[CLASS],” enter “[Class of 1958],” then delete the brackets. This will ensure that the correct font, font size, and color are not removed.
7. Continue to enter appropriate information inside the brackets, and then remove brackets at the end.

8. For email addresses, please highlight the text inside the bracket (“enter email address”) and click on the globe icon with a link chain. It is the icon to the right of the “block justify” image.
9. After clicking on the globe, a small window will pop up. Under “link type,” please select “E-Mail.” Under “E-Mail Address,” please type in the correct email address.

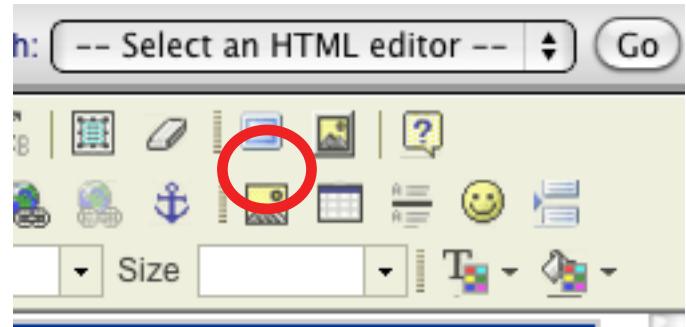


## Adding an Image to your Email

1. Click your cursor to where you want your image to be inserted.
2. Look for the gray buttons above the email, (“Preview HTML,” “Import HTML,” “Open file manager,” etc.) Click on the third button from the left, titled “Open file manager.”
3. Search for your class/club/group folder.
  - Class folders are titled “Class of 1234” or simply “1234.”
  - Clubs have their own sub-folder under the “Clubs” folder. If you do not see yours, please create a sub-folder under “Clubs.”
  - Groups have their own sub-folder under the “Groups” folder. If you do not see one, please create a sub-folder under “Groups.”
4. Scroll down and click on the gray button titled “Upload files.”
5. If your computer says that you have an “Inactive plug-in,” scroll to the bottom and click on “browser based upload.” Upload your image.
6. Once your image is uploaded, click “Insert Image Into HTML.” You can then close the file manager window.

## Editing an Image in your Email

1. Click on your image so that it is highlighted. (The image should be slightly blue, indicating you've highlighted it.)
2. Click on the yellow square icon (circled in red), to edit the image.
3. A pop-up window will come up on your screen, titled "Image Properties." The "Image Info" tab will be open, do not click elsewhere.
4. Under "Alternative Text," please enter a brief description of your image. This is used if your image is unable to load (the text you enter will be displayed instead), and also for the blind, where a computer will read the text to the individual.
5. Under "width" and "height," please make sure the lock icon is locked. This will ensure that the original proportions of the image remain the same. Enter the width (not exceeding 360 pixels) or height, and the computer will adjust to the appropriate height or width.
6. In "Border," enter a number (0-5) for the thickness of your desired border, 0 being no border, and 5 being a very thick line/border around your image. We recommend you use either 0 or 1 for the most professional-looking emails.
7. Leave "hspace" and "vspace" blank.
8. The "Align" drop-down menu will allow you to place your object to the left, center, or right side of your email.
9. Once these fields are completed, please hit "Ok." The window will automatically close.



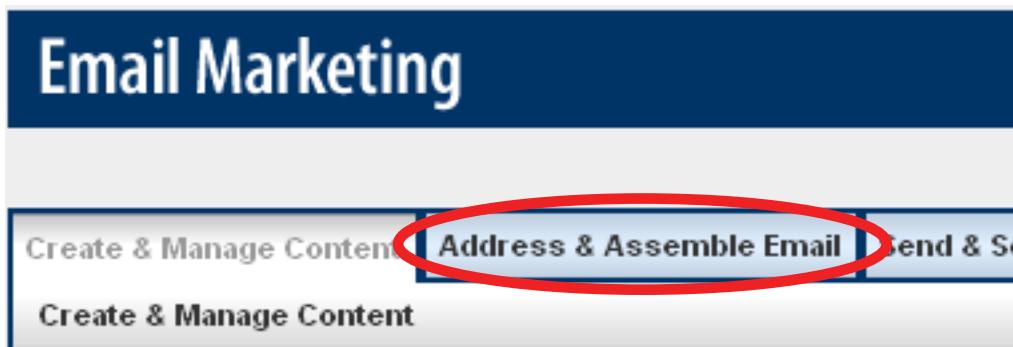
## Saving the Email in Harris

1. Look for the gray buttons above the email, ("Preview HTML," "Import HTML," "Open file manager," etc.) Click on the right-most button, "Copy HTML to text version."
2. Scroll down and click on the "Save content" or "Save content and exit" gray button. Save often!
3. You will automatically be exited out of this screen if you choose "Save content and exit."

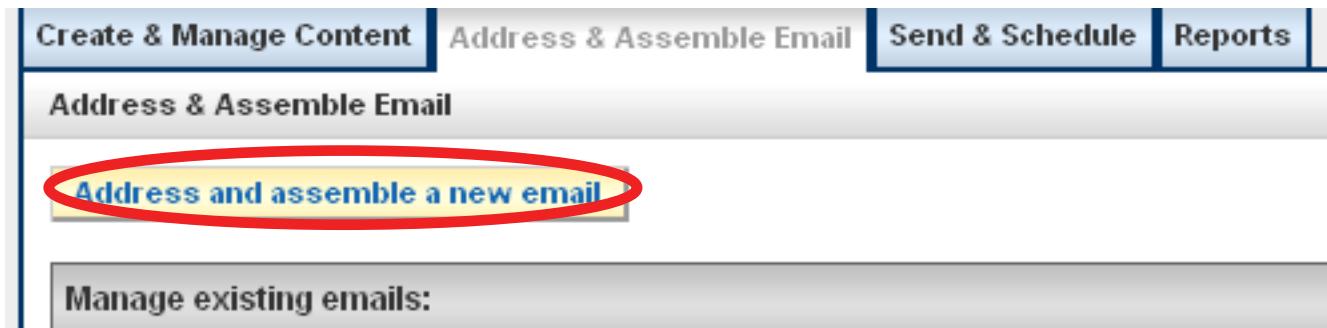
# Preparing to Send your Email

## Address and Assemble

1. Click on the “Address and Assemble Email” tab.



2. Click on the “Address and Assemble a New Email” button.



3. You will reach a page with boxes for all the information you need to enter. There are three sections, which are detailed below. Most of these fields are required: please read carefully to make sure you enter the correct information.

### Email details:

1. Email name: Enter the same name as in the “Create & Manage Content” tab, when you created your email. This name will not be seen by email recipients.
2. From: Choose “Wellesley College Alumnae Association.”
3. From email address: enter the address you want the email to be sent from.
4. Reply-to email address: Most of the time, this will be the same as the “from” address. If you want replies to go to a different address, enter that address here.
5. To: Enter “Wellesley Class of 1234” or Club/Group name.

6. BCC email addresses: If you want to include anyone who would not otherwise receive the message, enter her email address here.  
\*\*NOTE: this field should only be used for one or two addresses; if you need to send to more than that, please talk to the tech folks about creating or uploading a different list.
7. Subject: Enter your subject line here. Remember, your subject line should be short, descriptive, and include the word “Wellesley” and your class/club/group name.

## Email content and recipient list:

### Email content and recipient list

Select email content:

Select recipient list:

Select type of email to send:  
 HTML and text  
 Text only

1. Select email content: Click on the drop-down menu and select the name of the content you created in the “Create & Manage Content” tab. The content should be at or near the top.
2. Select the appropriate recipient list under “Select recipient list.”
3. Leave “HTML and text” selected.

## Campaign and Categories:

1. Under “Available Campaigns” select “Club Emails” or “Classes.” If neither apply to you, leave blank.
2. Categories: Select the correct message category from the box on the left, and click the “Select” button to copy it to the box on the right.
3. Click the “Save this email” button.
4. If there are any issues with the email definition, the red text above the button will let you know. If it reads “Email definition ok” then you can proceed.

**Campaign & Categories**

Available campaigns:

Selected campaigns:

Available categories:

## Schedule and Send your Email

# Email Marketing



1. Click on the “Send & Schedule” tab.
2. You will see a page containing a calendar (today’s date will be highlighted).
3. Click on the date you want to send the email. If you do not see a calendar, click on “Month” next to “Calendar View” at the top of the page.
4. On the next page, you will see a list of times on the date you selected. Click on the time to select.
5. A new window will pop up, allowing you to choose the email you are sending:

**Send an email**

**1. Select an email below.**

Available emails:

- 1958 Reunion Financial Aid Email #5
- 1958 Reunion Financial Aid Email #4
- 1958 Financial Aid Email #3
- 1958 Reunion Email
- Financial Aid Email 1958
- (corrected) 1958 Financial Aid Email
- 1958 Reunion Financial Aid Email
- 1958 Record Book Email #2
- 1958 Record Book Email 2013.01
- 20110316 – 1958 Philadelphia Mini '58 Houston mini

**2. Select the recurring options for this email.**

Recurrence:

Does not recur

End date:

No End Date

January  1  2007

**3. Add the email to the schedule.**

This email will be added to the schedule on:

EASTERN TIME ZONE 5/7/2013 at 2:30pm EDT

**Schedule this email now**

6. In Box 1, select the Email Name of the email you just created.
7. In Box 2, make sure that “Does not recur” is selected under “Recurrence.” (This is the default setting).
8. In Box 3, double-check the scheduling time and click on “Schedule this email now.”
9. The page will reload the schedule for the selected day, with your email on it. Click on the name of the email to review the email. A popup window will appear, and from here you can preview the data for the email, as well as the email itself. It is a good idea to preview your email before approving to ensure that everything is correct.

## Approve your Email

1. IMPORTANT: You MUST complete this step for every email you send. If you do not complete this step, the email will not be sent.
2. Now that you've scheduled your email, it must be approved. This step gives you a last chance to review the email and correct any errors before sending. To approve, locate your email in the calendar, and click the red “Approve” link below the description.  

3. Once you approve the email, the email will look like this: Congratulations! Your email is set up, and will be sent at the selected time.

## Making Changes

1. If you have set up your email but need to make a last-minute change, you can do so. Log in as you normally would and make changes under the “Create/Manage Email Content” tab.
2. To cancel or reschedule a scheduled email: Go to the “Send & Schedule” tab and locate your email on the calendar. Click on the name of the email. You’ll get a pop-up window with the details of your email.
3. From here you can preview the HTML or text versions of your email, delete your email entirely, or reschedule it for a different date or time. To delete, click on the “delete” link, or to reschedule, click on the “Reschedule link.”
4. To modify an email: If you need to update the content of your email, you can do so at any time before the email is sent. To modify the email, click on the “Create & Manage Content” tab. Locate the email in the list, and click the “Edit” link next to it. Modify as needed (making sure to update both the HTML and text versions) and click Save.

5. Emails can only be modified, cancelled, or rescheduled until they are sent. If you modify an email after it has been sent out, it will not be re-sent.
6. IMPORTANT: If you modify your email, you must re-approve it. Once you make the necessary modifications, go back to step 7 of this document to re-approve your email.

<b>Content:</b>	1958 Reunion Financial Aid Email #5 <a href="#">Preview HTML</a> <a href="#">Preview text</a>
<b>List:</b>	1958 Email List (Type:Combined)
<b>Query:</b>	Start with the 1958 Full List for Email Marketing list , then add the Classes ID for 1958 list
<b>Email preference categories:</b>	Class Information
<b>Campaigns:</b>	Classes
<a href="#">Delete</a> <a href="#">Approve</a> <a href="#">Reschedule</a>	

## QUESTIONS?

Contact the Alumnae Association at 781.283.2331 or email [alumnae@wellesley.edu](mailto:alumnae@wellesley.edu).