

Creating Email Marketing Distribution Lists

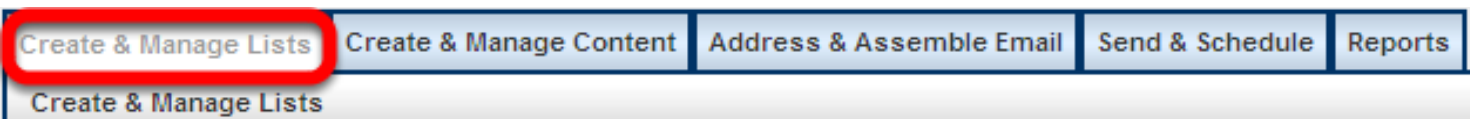
Email Marketing lets you send target emails to subgroups of your constituents. We have pre-created a list containing all your constituents (club members or classmates). If you are sending an email to all your constituents, you may skip this step.

For example, you might create a new distribution list:

Classes: To send detailed mini reunion information only to classmates in the area where the mini will be held

Clubs: To promote a young alumna event to graduates of the last decade in a club area

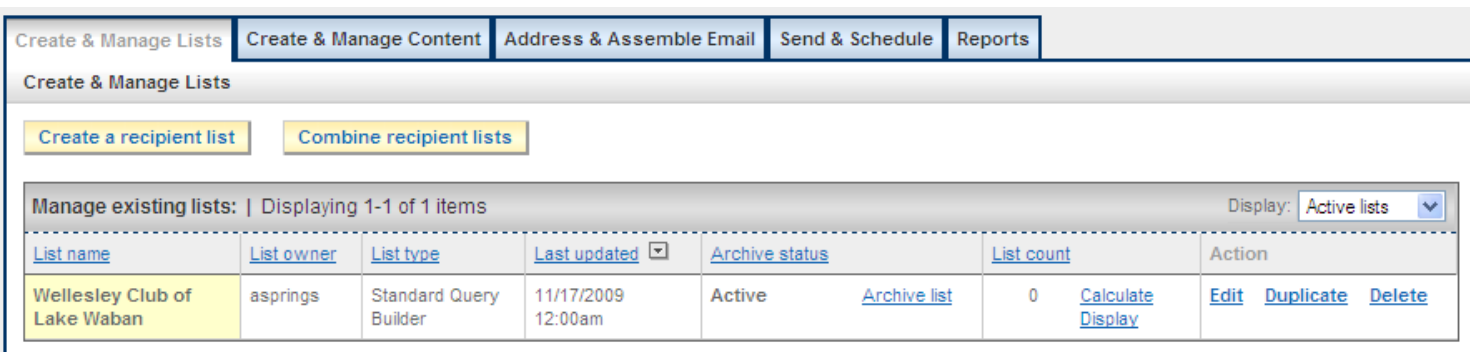
Email Marketing: Sign in



Sign in to Email Marketing as you normally would.

For instructions on signing in, please refer to the basic "How-To" documentation for Email Marketing. Once you are in Email Marketing, click on the "Create & Manage Lists" tab if it is not already selected.

Step 1: Determine if list is needed



Lists in Email Marketing are reusable - you only need to create each list once. Lists are defined by sets of rules (rather than specific names), and the final distribution list is generated by the system based on these rules when the email is sent.

For example, a list for a young alumnae group within a club might be defined as "Members of the Wellesley Club of Lake Waban with class years less than 2005". It would not be defined as "Wendy Wellesley, Suzie Smith, and Sally Jones"; rather, when you send an email using the list, the Email Marketing system determines that those rules include Wendy, Suzie, and Sally. If Wendy has moved out of your club area since the list was defined, or if Jane Smith has moved in, Email Marketing will take that into account.

Before you create a new list, make sure you do not already have a list that meets these criteria. In the photo above, the all-club list is the only one available.

Step 2: Create a List

Create & Manage Lists | Create & Manage Content | Address & Assemble Email | Send & Schedule | Reports

Create & Manage Lists

Create a recipient list | Upload a recipient list | Combine recipient lists

Manage existing lists: | Displaying 1-1 of 1 items | Display: Active lists

List name	List owner	List type	Last updated	Archive status	List count	Action
Demo Email List	wcaademo2	Standard Query Builder	9/17/2010 12:17pm	Active	Unknown	Archive list | Calculate | Display | Edit | Duplicate | Delete

To create a list, click the "Create a recipient list" button at the top.

Step 3: Enter List Name & Criteria

Name your list

List name: Mike Waban Young Alums 1 | Use this list as a test list: ☐

Enter your search criteria 2

- + User data
- + Personal
- + Common Search
- + School
- + Degree
- + Address
- + Relation
- + Business
- + Misc

(Misc Can Contact = Y) and (Misc Donor Code starts with AL) and (Misc Wellesley Club = CLUB000)

Query OK

Admin Restrictions: ((Misc Can Contact = Y) and (Misc Donor Code starts with AL) and (Misc or (Personal Client ID = A00000049) or (Personal Client ID = A00000033))

Save list | Cancel

First, change the list name. The name of the list should be descriptive and understandable. It will not be visible to your constituents, but you will need to use it to identify the list when you create future emails.

List names must be in the format: Club/Class name - Description.

E.g. "Boston Club - Young Alumnae" or "Class of 2010 - New England"

Next, add in the list criteria. Any criteria you add will be "AND" criteria - that is, your list will include any alumnae matching all criteria in the list (e.g. Alumnae who live in your club area AND are young alumnae). To create a more flexible list, see the "Advanced List Creation" section.

If you are a class officer, your criteria should include your class year in School -> Preferred Class and any other criteria you need (e.g. Preferred Class = 2010 and State = MA,NH,VT,ME,RI,CT).

If you are a club officer, your criteria should include your club in Misc -> Alumnae Club Name (e.g. Alumnae Club Name = Wellesley College Alumnae of Boston and Preferred Class = 2009, 2010). Note that your account has been restricted to send only to your constituents. Even if you do not include your class or club in your new list, your email will only go to members of your class or club.

Finally, click "Save List" to save the list. You may now proceed as usual with creating your email. Your new list will be available in the Address & Assemble tab.

Step 3, Alternate: Advanced List Creation

Enter your search criteria

(	School	Preferred Class	=	2001	← Multiple values allowed	)	and
((	Misc	Alumnae Club Name (admin only)	=	MA-Worcester		)	or
(	Misc	Alumnae Club Name (admin only)	=	MA-Boston)	

(School Preferred Class = 2001) and ((Misc Alumnae Club Name (admin only) = MA-Worcester) or (Misc Alumnae Club Name (admin only) = MA-Boston))

Query OK

Admin Restrictions: none

Save list Cancel

The Advanced Query Builder allows you to create more flexible lists, including "OR" criteria (e.g. club members who are young alumnae OR live in a certain town).

List Criteria

Some criteria you may wish to use:

Class Years: Select School -> Preferred Class. You can enter multiple class years separated by commas, or ranges separated by dashes - e.g. "1998,2001,2005" or "2005-2010".

States: Select Address -> State. You can enter multiple states with commas in between - e.g. ME, NH, VT, MA, RI, CT would include alumnae in all of New England.

Birthday: Select Personal -> Date of Birth.

When you are finished, review the red query text to make sure it reflects your preferred list. Click the "Save List" button.

If you need to send to a list defined by criteria not listed here, consult the Alumnae Association for more information.

Note that there is no need to exclude alumnae with no email on file from your email marketing lists - those alumnae are automatically removed by the Email Marketing system.

Creating a Test List

The screenshot shows the 'Standard Query Builder' interface. At the top, there are two tabs: 'Standard Query Builder' (selected) and 'Advanced Query Builder'. Below the tabs, the 'Standard Query Builder' section is active. It contains a yellow header 'Name your list' with a text input field 'List name: Test List - Wendy Welles' and a checkbox 'Mark this list as a test list: [checked]'. Below this is another yellow header 'Enter your search criteria' followed by a list of search criteria with expandable icons: User data, Personal, Common Search, School, Degree, Address, Relation, Business, and Misc. A red text box shows the query: '(Personal E-Mail = wendy.wellesley@gmail.com)'. Below the query is a red 'Query OK' button. At the bottom, there is a text area for 'Admin Restrictions: ((Misc Can Contact = Y) and (Misc Donor Code starts (Personal Client ID = A00000049) or (Personal Client ID = A00000033))' and two buttons: 'Save list' and 'Cancel'.

Standard Query Builder Advanced Query Builder

Standard Query Builder

Name your list

List name: Test List - Wendy Welles Mark this list as a test list: ☒

Enter your search criteria

- + User data
- + Personal
- + Common Search
- + School
- + Degree
- + Address
- + Relation
- + Business
- + Misc

(Personal E-Mail = wendy.wellesley@gmail.com)

Query OK

Admin Restrictions: ((Misc Can Contact = Y) and (Misc Donor Code starts (Personal Client ID = A00000049) or (Personal Client ID = A00000033))

Save list Cancel

Most emails do not need to be tested - the alumnae office has tested the email template with most common email clients. However, if you feel the need to send yourself a test message, you may create a test list for yourself.

To create a test list, create a list as described above. Name the list with the same naming scheme - e.g. "Class of 2010 - Class Secretary only for testing". In the list criteria, if you know your Banner ID number (an "A" or "B" followed by an 8-digit number; this number appears on the top line of the address label on your alumnae magazine), enter it in the Personal -> Client ID box.

If you do not know your Banner ID, you can enter the email address you use with the college in the Personal -> E-Mail box. Note, however, that this must be the same as the email we have on file for you. If you enter a different email address, it will not work. You can verify your email by reviewing your online Community record.

If you need to send test messages to fellow class officers for review, send a test message to yourself and forward it to the relevant parties.

Messages sent to test lists are sent with the word "SAMPLE" appended to the subject line. Do not use test lists for anything other than officer review prior to sending a message.