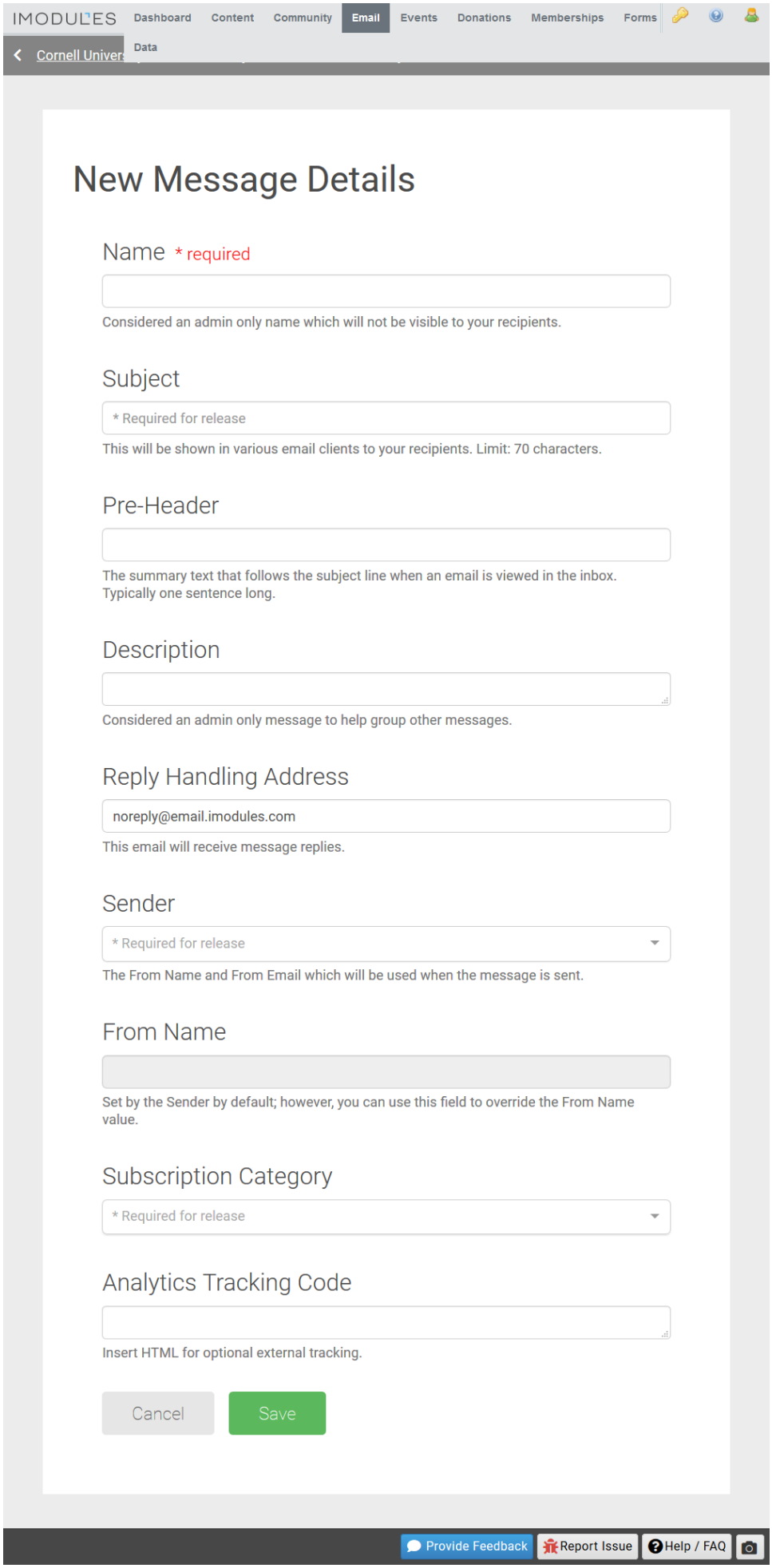
iModules New Email Builder Step-by-Step Instructions

Last Updated: August 3, 2019

Getting Started

1. Navigate to the **Email menu** and choose **Email Home**.
   You will be in the Drafts area.
2. Click the **Create New Email** button.
3. Enter the **Email Details** and click **Save**.


IMODULES
Dashboard
Content
Community
Email
Events
Donations
Memberships
Forms
Data
Cornell Univers
New Message Details
Name * required
Considered an admin only name which will not be visible to your recipients.
Subject
* Required for release
This will be shown in various email clients to your recipients. Limit: 70 characters.
Pre-Header
The summary text that follows the subject line when an email is viewed in the inbox. Typically one sentence long.
Description
Considered an admin only message to help group other messages.
Reply Handling Address
noreply@email.imodules.com
This email will receive message replies.
Sender
* Required for release
The From Name and From Email which will be used when the message is sent.
From Name
Set by the Sender by default; however, you can use this field to override the From Name value.
Subscription Category
* Required for release
Analytics Tracking Code
Insert HTML for optional external tracking.
Cancel
Save
Provide Feedback
Report Issue
Help / FAQ

NAMING CONVENTION to follow for all Cornell emails:
NetID/Program Area Name/Email description/Date to send in format: 2018-09-27
Example: dhe4/Central/FY19 Message to volunteers/2018-09-27
Link to create this is here on Tableau:
https://tableau.cornell.edu/#/views/EmailMarketingTools/CampaignNameCreator?:iid=1

Subject is your email subject line.

Description is internal for reference only and will not show to anyone except administrators in the system.

Reply Handling Address is where all replies to your email will appear. This can be different than the from address connected to the sender identity. The default is an iModules noreply email address. You can overwrite this value.

Fields marked "*Required for release" indicates that the field does not need to be filled for the email to be saved, however it must be filled before the email can be released.

If you don't have a sender identity set up yet, you must do that first. See sender identity instructions for more details.

Ignore the Analytics Tracking Code field

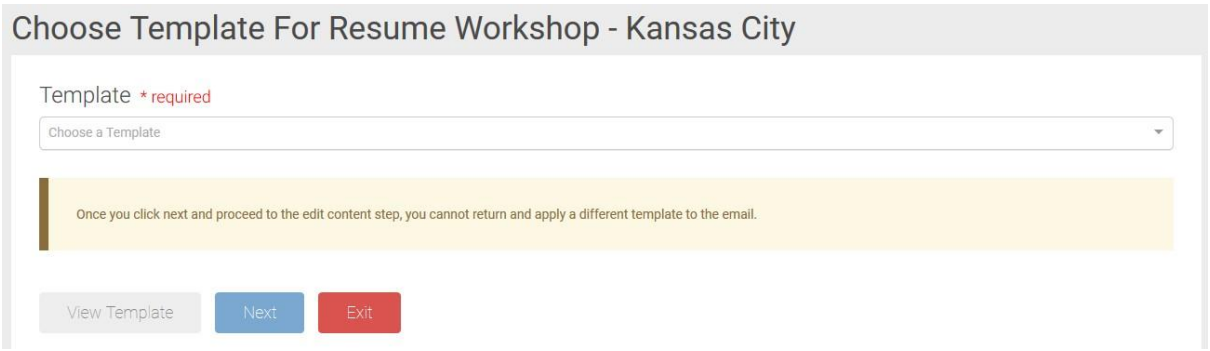
Editing the Email Details

1. Click on the **Subject** or **Sender** to be moved back to the Email Details to edit either one.
2. Make the necessary changes.
3. Click **Save**.

Build From Template

1. Click **Template** from the Draft card for your selected email.

2. A dropdown list will present the templates that are available to choose from
*Choose from one of the Cornell approved and supported templates – all approved templates begin with AAD -
AAD Save the Date

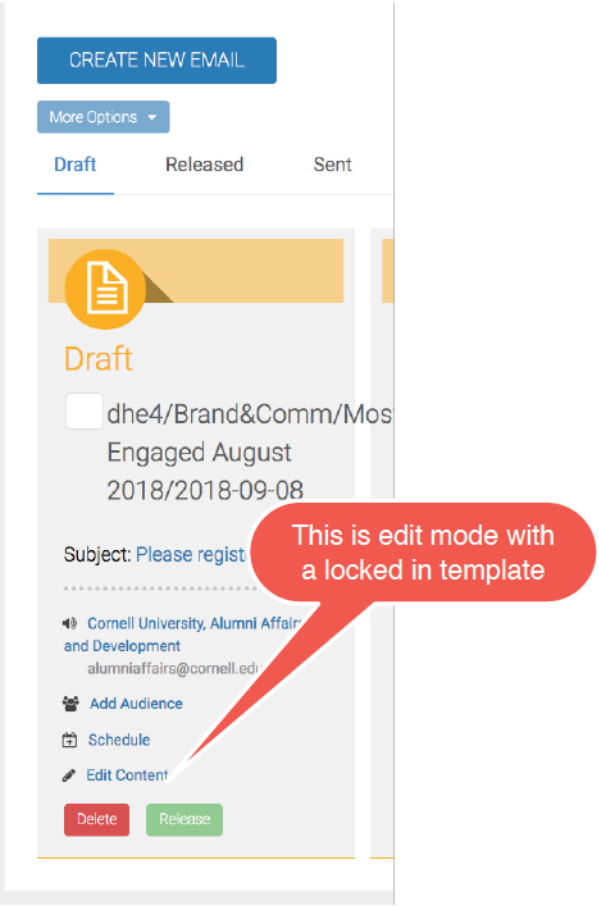


3. Once a template has been selected, use **View Template** to make sure it is the template you want.
   NOTE - Once you click **Next**, you will be locked into this template and you won't be able to pick a different one.

4. Click **Next** to use the template and move to the Edit Content step. Click **Exit** to leave this screen without saving your selection.

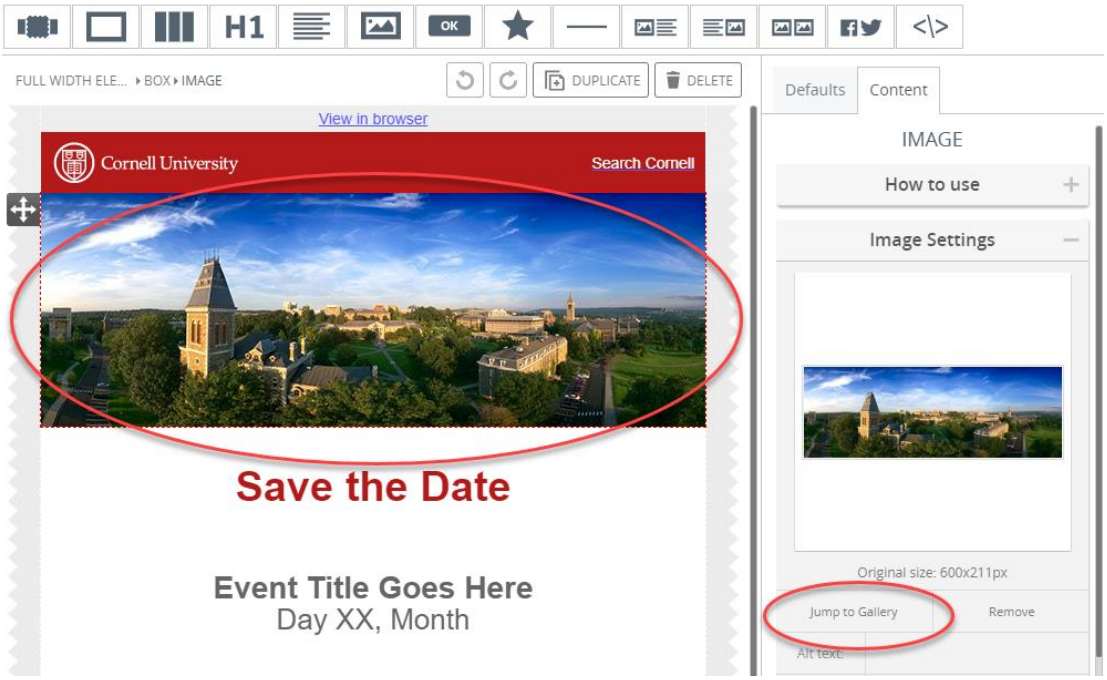
5. When editing content, you will have several buttons available.
   Click **Save** to save your work.
   Click **Save and View** to view your message.
   Click **Next** to move to the Preview step (make sure you save before moving on so you don't lose any changes).
   Click **Exit** to leave this screen (you will lose changes from your last save).

The Draft card text on the home screen will now read **Edit Content** since you have chosen your template. You cannot choose another template for the selected email.



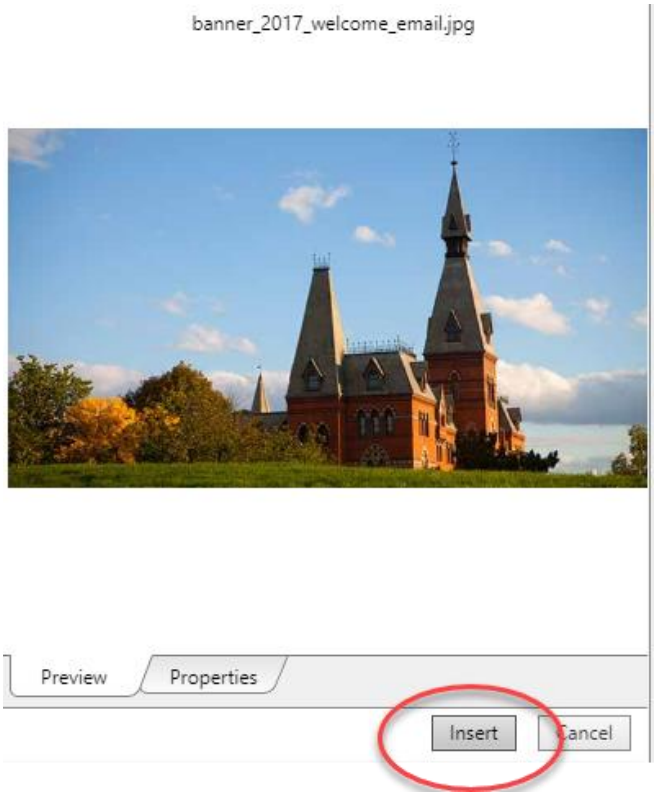
Editing the banner image in your email.

Double click on the image block, or click once on the image and then choose ‘Jump to Gallery” in the right hand pane, which will bring you to the image manager. Here you can upload a new image or select one from a saved folder.

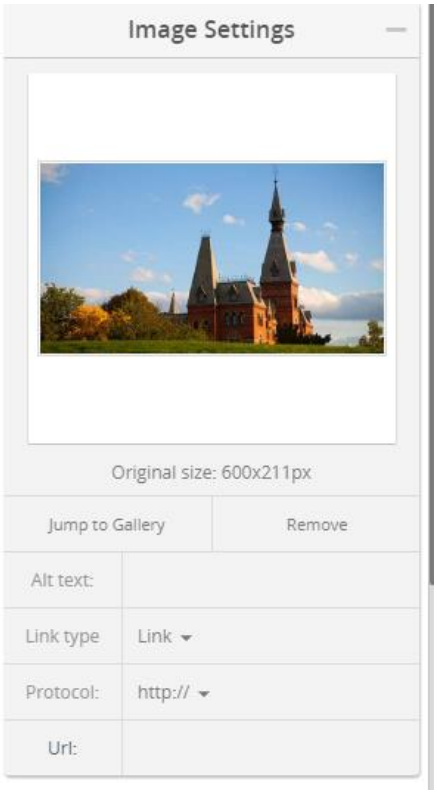


NOTE: Banner images MUST be 600px wide by a maximum 400px tall. If your image is not the right size, please resize it before uploading into the gallery.

When you have the photo that you want selected in the gallery, click INSERT. The image will automatically update in your email.

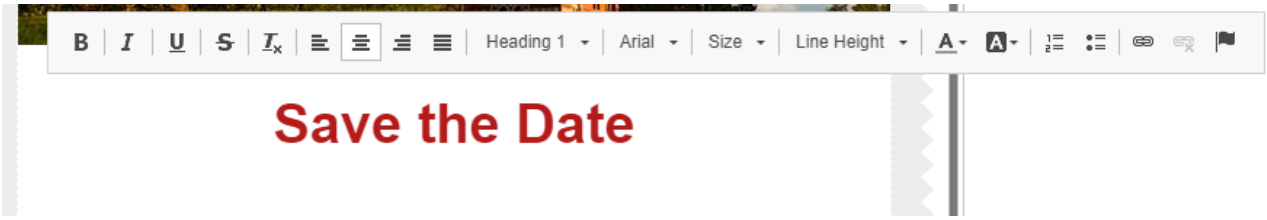


From email build screen, you can add a URL and ALT TEXT to the photo using the right side bar under “Image Settings.”



Editing the Header and Body text

Double click into the red header text box until you see the text editor tool appear:



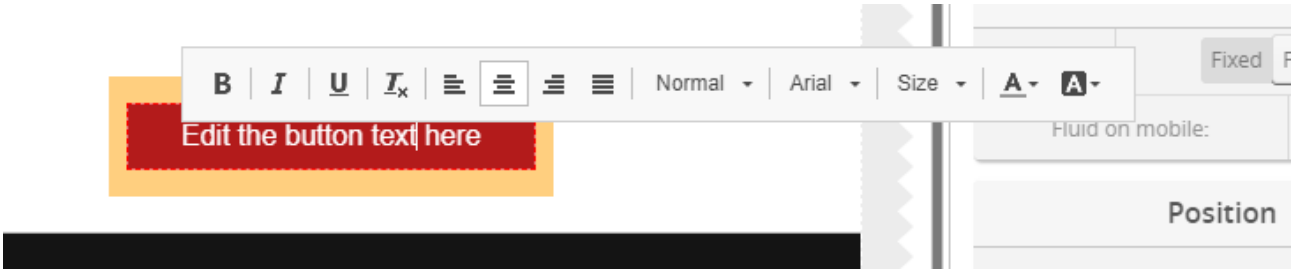
Change the text by typing directly into the box. Do NOT select the filler text and delete it, as this will cancel the formatting.

In order to keep the formatting, do not delete the first letter present in the template. For example, you can delete everything except the first S in this example above, type in your new text, or copy and paste (**FROM NOTEPAD – DO NOT PASTE FROM WORD** – you will need to strip the formatting from any text you are using, so copy and paste it into a notepad document first, then copy and paste from there into the iModules template).

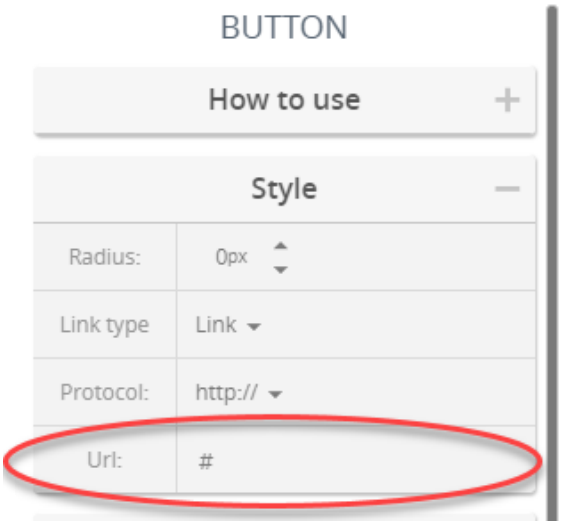
Follow the same instructions to edit the body text.

Editing a Button

Double click into the button until the text editor appears. Edit the text directly in the button.

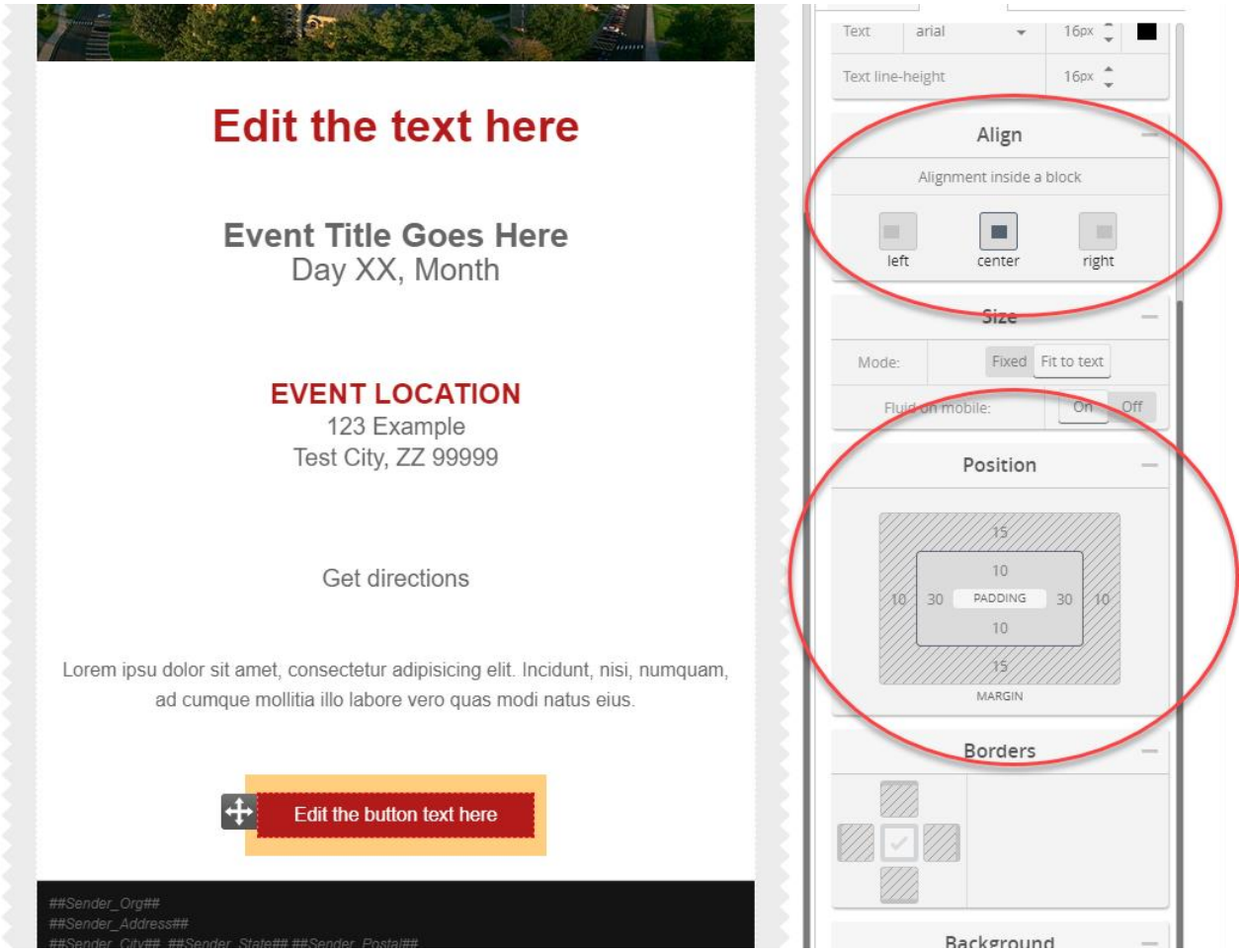


To change the button link, make sure you've clicked on the button and then navigate to the right side panel. Edit the URL under the STYLE section.



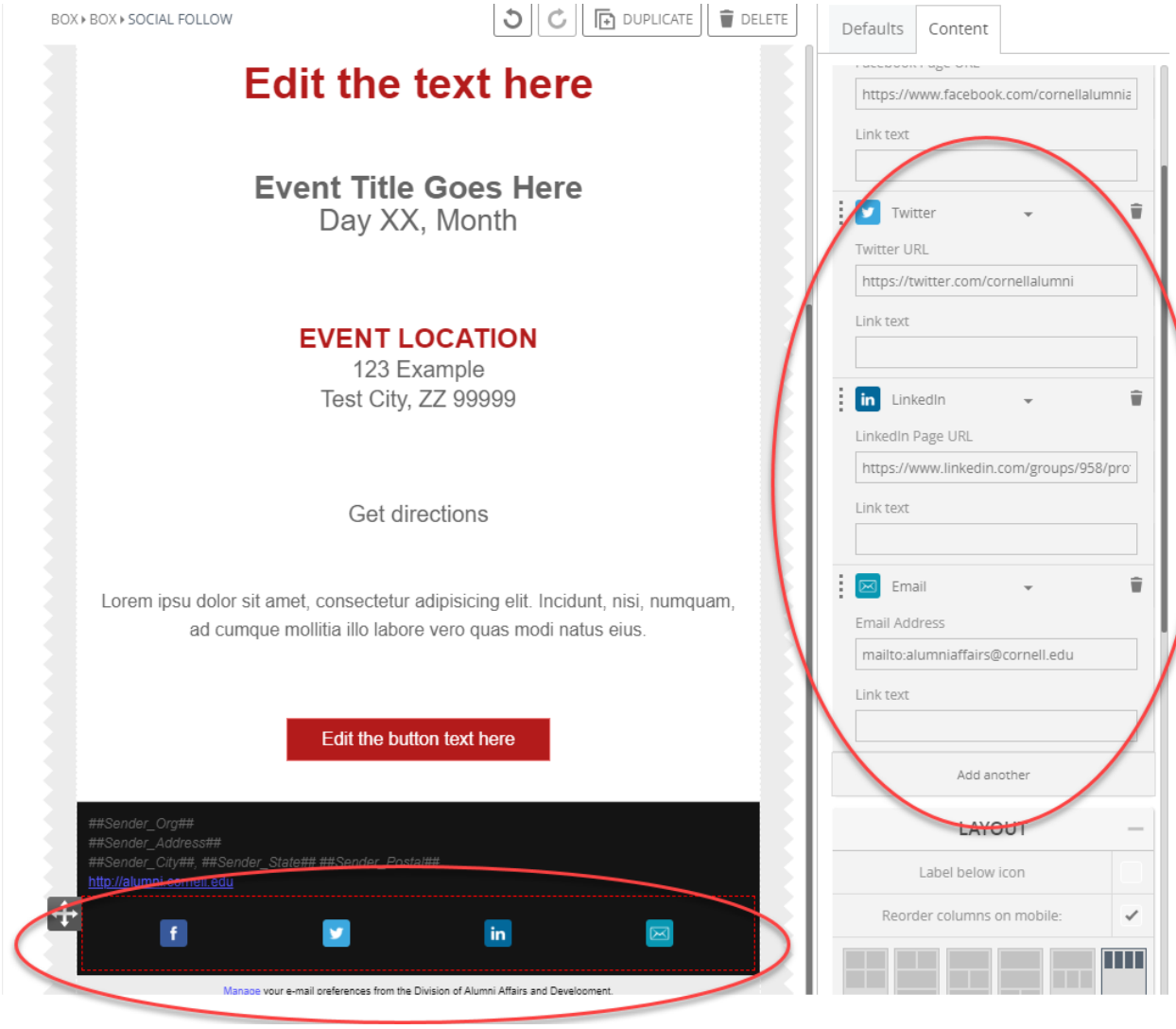
You can also change the alignment of the button on this panel by selecting left, right, or center under the ALIGN section of the panel.

You can add space inside the button around the text if necessary by editing the padding. You can add white space around the button by editing the margins.

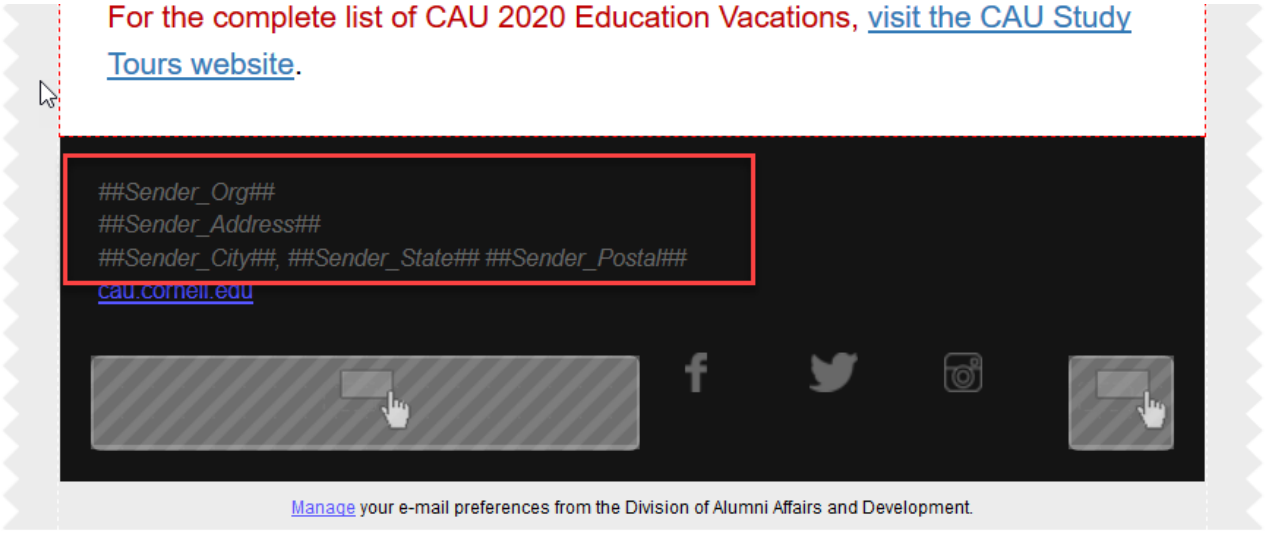


Editing the social media buttons in the footer

If you need to have the social media buttons point to different links than the general alumni pages, you can edit the links by clicking into the social media icons, and changing the URLS in the right side panel:



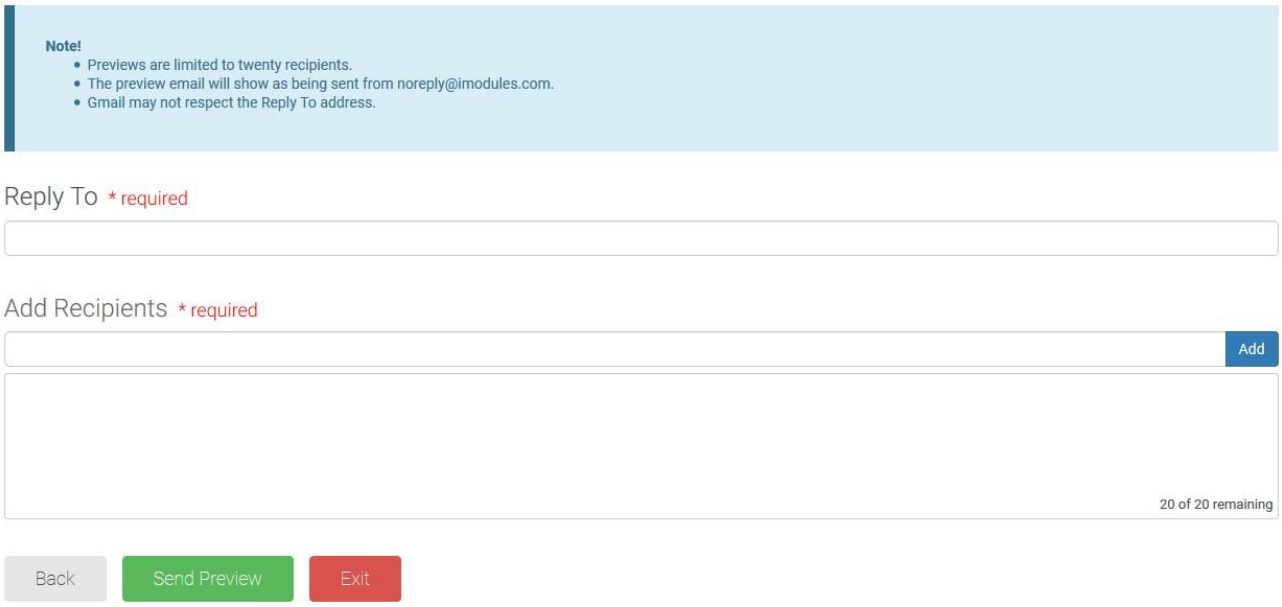
The tokens in the footer (in red box) are required for an email to be successfully previewed



Send a preview of your email by choosing NEXT, the blue button.

Preview

The Preview allows you to send a test copy of your email to up to 20 people. We recommend that you test how the message will look when received by mass market email services.



1. For the **Reply To**, provide an email address to receive replies to the preview email.
2. To **Add Recipients**, enter an email address and press the **Enter key** or press the **Add button**.
3. Click the **Send Preview** button to send the preview email.
   Exit will take you back to Email Home.

On the preview screen, you'll see a message if your email is missing a sender identity token and will alert you to any issues with your reply email.

After leaving the preview screen, you will NOT see any notification that a preview has been sent for your email. You will need to keep track of this on your own. A good way to do this is to always include your own email address as a recipient of the preview email, and file it away for your reference.

Once your email is complete, previewed, and ready to send, return to the Email Home screen by clicking EXIT on the preview screen to add your recipients and schedule the email.

Audience

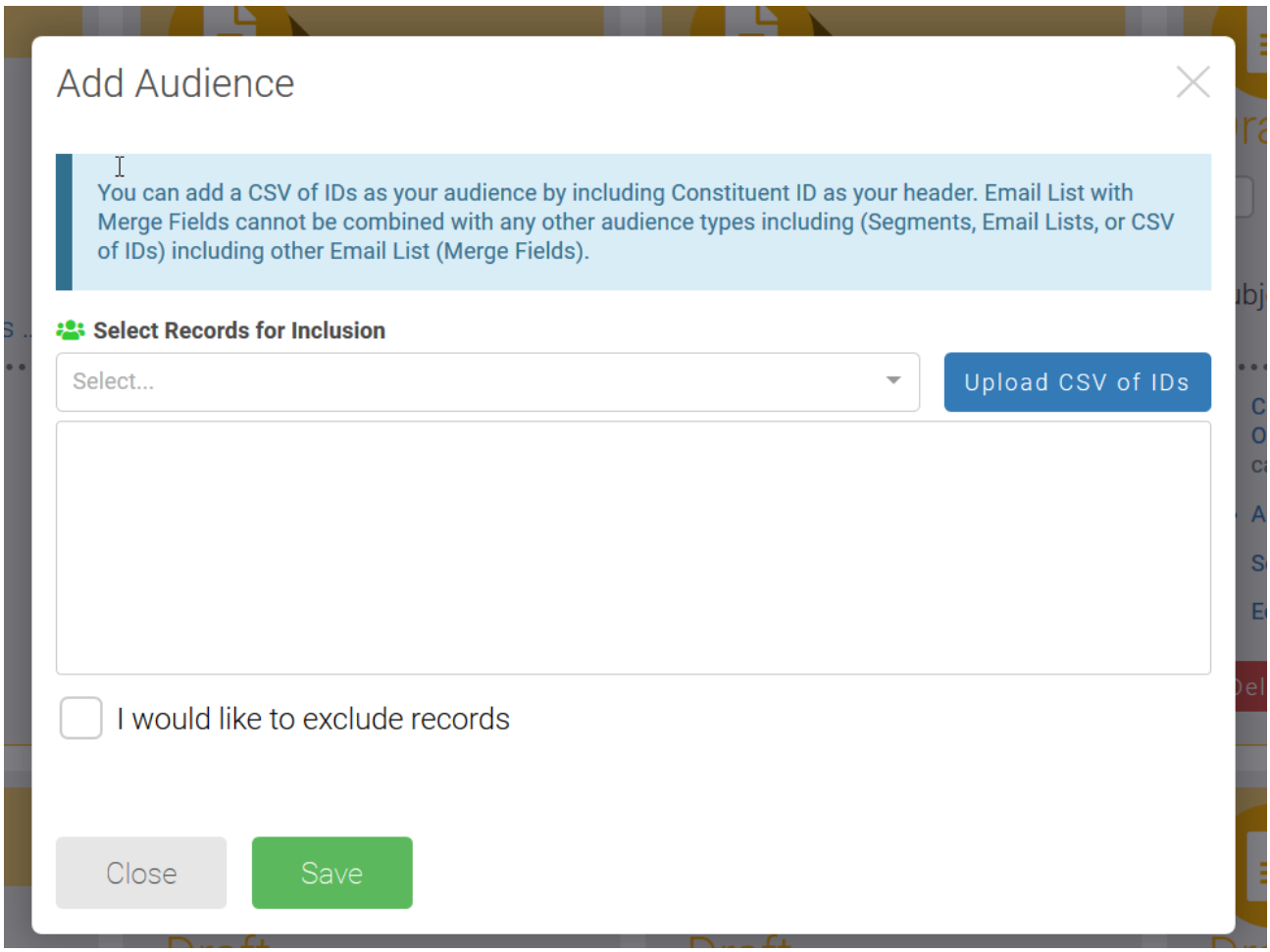
If you are a query user, please see query instructions.

Add Audience

1. Click **Add Audience** from the Draft card.

Add CSV of IDs

1. Click **Add CSV of IDs**.



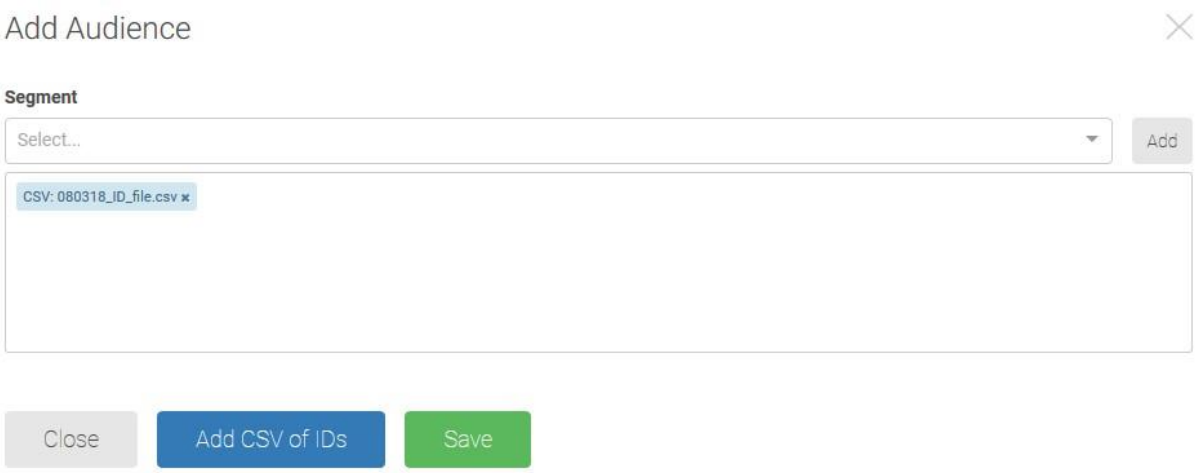
2. Browse to find the CSV file and select it. The system will match to the IDs provided. No new records will be created.
3. If there is CSV file, or segment, or list of recipients to be excluded, check the box and process in a similar manner.

NOTE - You will need to put a header in cell A1. The system will ignore the value in A1. The header should read “ConstituentID”.

NOTE - Only one column of ID numbers is allowed.

NOTE - The cap is 500,000 IDs per file.

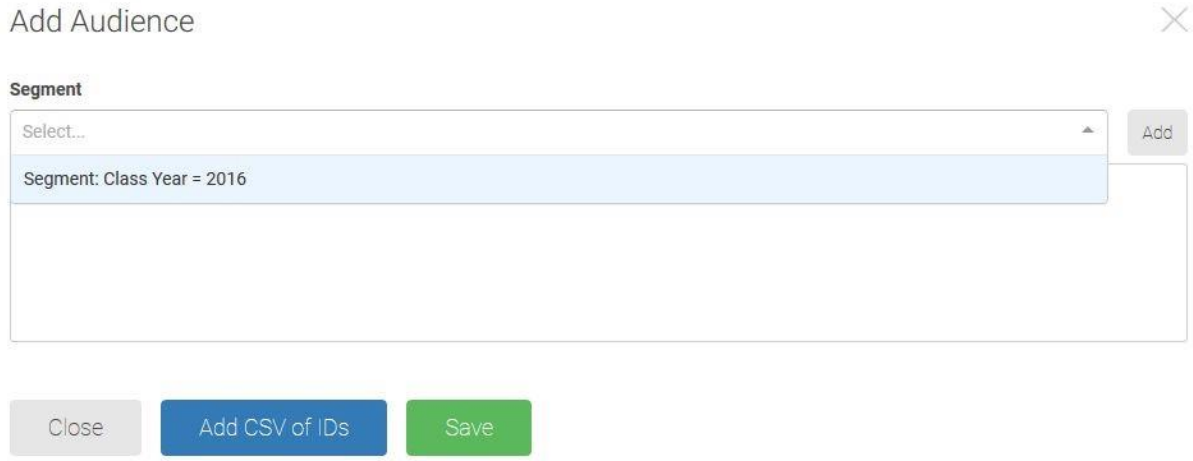
4. The added file(s) will display in the box.



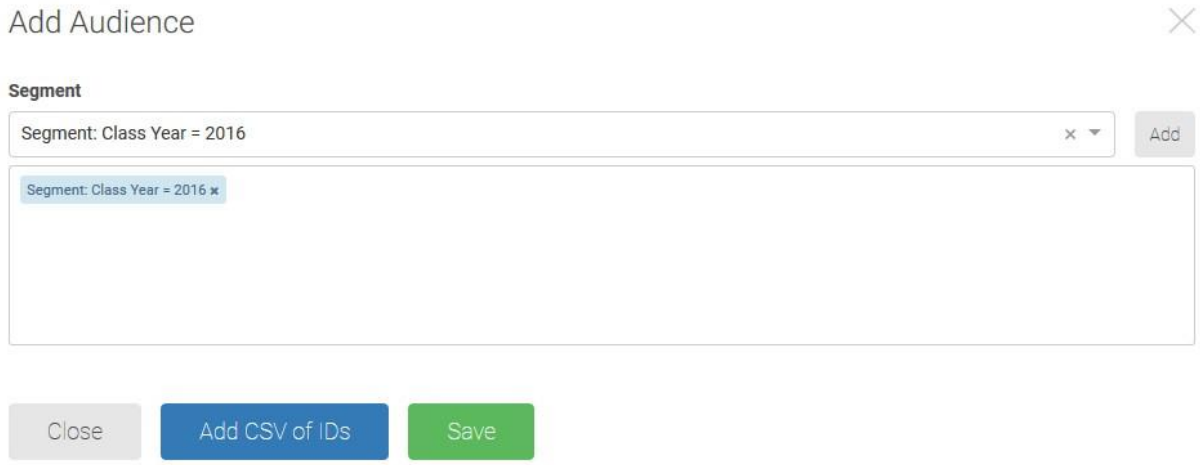
5. Click **Save**.
6. The Draft card text on the Home screen will then read **Edit Audience.**

Segment

1. Use the Segment search/dropdown to select the Segment you want to use.



2. Click the **Add** button.
3. The Segment will be added to the selection box.



4. Click **Save**.
5. The Draft card text will then read **Edit Audience.**

Schedule

*Recurring scheduling isn't available yet, but should be available in early September.

1. Click **Schedule** from the Draft card.

Send Immediately (should only be used in special cases)

1. Click the **Send Immediately Upon Release** radio button.
2. Click **Save**.
3. The Draft card will show Send Immediately. If you want to adjust the schedule, click on the **Send Immediately** wording.

Send on Specific Future Date(s)

1. Click the **Send on Specific Future Date(s)** radio button.
2. Click **Next**.
3. Set the date and time zone for when you would like to send the message.

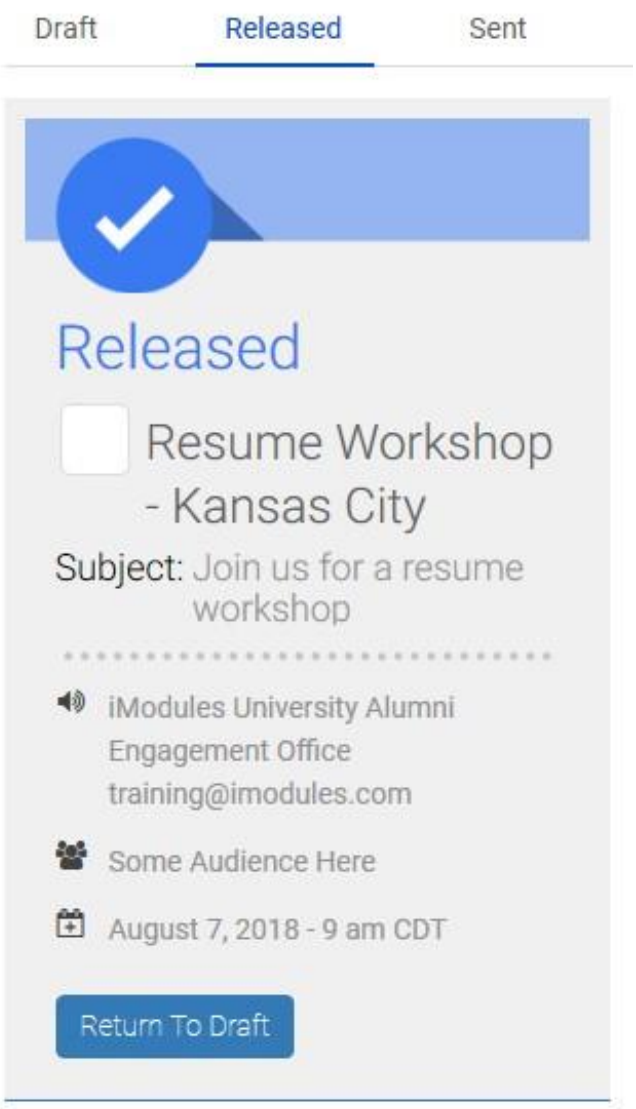
4. DO NOT USE **Add Another Send Date**. Ignore this option.
5. Once all of your dates are set, click **Save**.
6. The Draft card on the home pageshows the first date selected and will indicate if there are additional dates. Hovering over the additional date indicator, a box will appear listing all dates on which the message will be sent Times will convert to show in the time zone set to your computer.

Release

1. Once all of the items have been worked with the Release button will be active.
2. Clicking the **Release** button will move the message to the Released area.

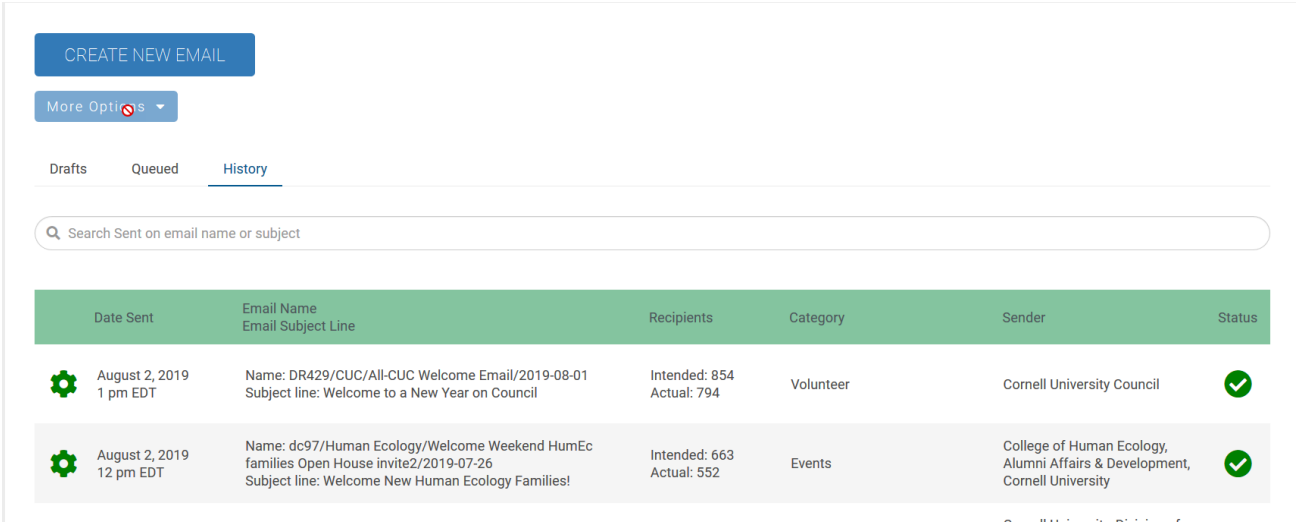
Released Area

1. Use **Return to Draft** to move the message back to a Draft.

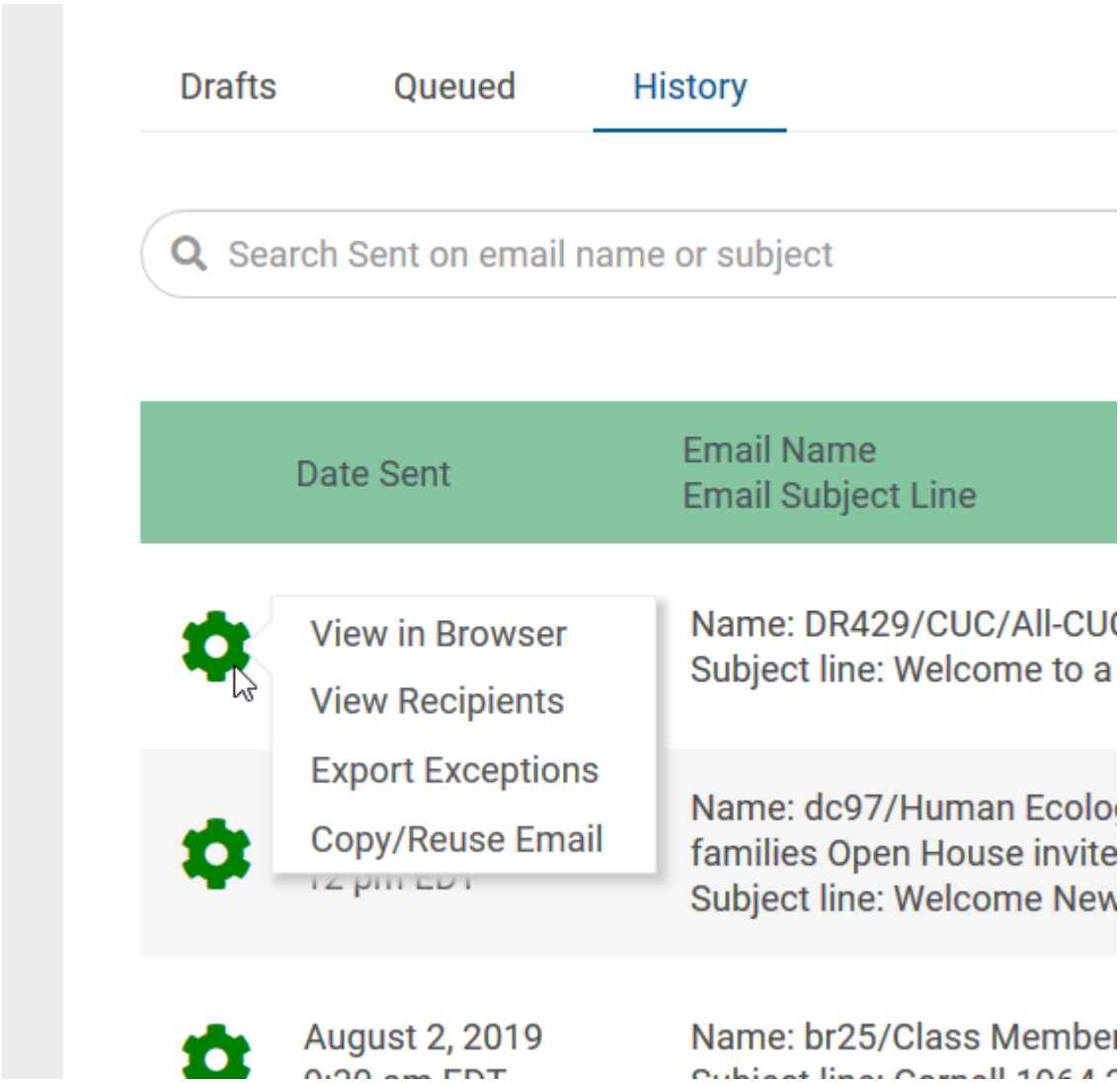


History Area

1. Selecting the History area will allow you to see emails that have been released and sent to constituents



From the History area, you can select the cog wheel to perform the following actions on an email that has been sent



1. View the email
2. View a list of recipients
3. View /Export constituents who did not receive the email
4. Create a copied version of the email (named “COPY – XZY”) in the Draft area.