

Sending emails in Civi

We've moved to Mosaico – a new email system within Civi which should make it easier to build and send emails. You'll find a complete set of instructions below, but if you have any questions or problems don't hesitate to email <u>fran@lcc.org.uk</u> and <u>conor@lcc.org.uk</u>, or call us on 020 7234 9310.

Before you get started

- We usually send local group emails on Mondays and Tuesdays please try and plan for your emails to be sent on these days.
- Please try and give as much notice as possible if you wish to send an email. This give staff the best chance of making sure your email goes when you want it to, but also means that we have time to run suggested edits past you. The earlier we can see your final draft, the better.
- Most emails will go to the supporters and members of LCC in your borough. However, if you need to send a more targeted email, we can create lists based on postcodes. This takes more staff time, so you'll need to give more notice (ideally a week) for these requests.

Logging in to Civi

- 1. Log in to Civi
 - Go to <u>https://membership.lcc.org.uk/</u> and click on the 'Login' button on the top right hand corner of the site.
 - Login using your personal membership username and password

Your ability to send emails through Civi is linked to your personal LCC membership. If you would like to be able to send emails, you need to let Fran or Conor know, including your group coordinator in that request. Ultimately, group coordinators have final say on who from their group can send emails.

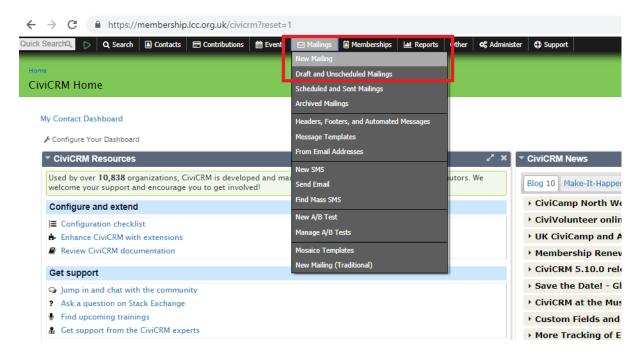
If you can't login, please email <u>fran@lcc.org.uk</u> or <u>conor@lcc.org.uk</u> and we can reset your password.



2. When you're logged in, there should be an additional menu at the top of the page. Click on the 'CiviCRM' button (in the red box below). This will take you to the Civi homepage, which has a new menu at the top.

| ← → C ☆ Secure https://membership.lcc.org.uk | | | | | |
|--|---------|-----------------|----------------|--------------------------|------------|
| 🔢 Apps 🔥 LCC homepage 🚯 LCC activism | 🔥 Civi | LCC Yahoo pages | 😫 The Guardiar | n 🔋 The Book Depository | e 0 |
| Gontent Structure Reports Help | CiviCRM | | | | |
| | | | | Discounts and Benefits - | Re |
| | | | | | |
| | | | | | |
| | | | | | |

3. Once here, you need to click on 'Mailings' and then 'New Mailing' at the top of the drop-down box.





4. This will take you to the mailing page:

| s cuchin CRM | CIVICRM |
|---|--------------------------|
| | |
| 1 Mailing 2 Design 3 Options | |
| Mailing Name Ø * | |
| Mailing Name | |
| Campaign 🛛 | |
| ٩ | |
| From © * | |
| "LCC Membership Team" <membership@lcc.org.uk> +</membership@lcc.org.uk> | |
| Recipients * | |
| Groups or Past Recipients * 🖌 No Recipients | |
| Subject * | |
| Subject I/ Tokens • | |
| | |
| | |
| DELETE DRAFT | BI SAVE DRAFT > CONTINUE |
| | |
| | Access Key |

Setting up your mailing

- 5. Give your mailing a name in the 'Mailing Name' box. This is the name that will appear in the list of emails on Civi, so it should be something short and clear, e.g. 'Barnet newsletter March 2018'.
- 6. You can leave the 'Campaign' box blank.
- In the 'From' box, select your group's email address (e.g. barnet@lcc.org.uk). This is the name and email address that recipients will see in their inbox.
- 8. In the 'Recipients' box, select the relevant mailing list for your group, e.g. Barnet Cyclists (you can type the name in the box rather than scrolling all the way down). This is the list of people your email will be sent to. You'll be able to see the number of people of the list just to the right.
- 9. Fill in the 'Subject' box with the subject line that will appear in people's inboxes (you can ignore the box that says '</> Tokens'). If you're happy with everything on this page, click 'Continue' at the bottom right.

Creating your email

10. On the next page, you'll need to select the template for your email. Find the template for your group (e.g. Barnet Local Group Template), hover over it and click 'select'.



11. Now you can start adding content to your email. The email is made up of different blocks, including text, images and buttons, which you can add or remove independently. However, please don't change any sections other than the headline and the main email body (highlighted below).

| Barnet Cycling Campaign news: June 2018 |
|---|
| from the local group of London Cycling Campaign in Barnet |
| Dear (contact first_name), |
| INSERT YOUR CONTENT HERE |
| Barnet Cycling Campaign barnet@lcc.org.uk |
| Want to keep up to date with the latest news? Visit our <u>website</u> or follow us on <u>Twitter</u> or <u>Facebook</u> |
| About us - Monthly meetings - Contact us |
| You received this email because you're signed up to receive Barnet Cycling Campaign news. If you can't see this email, please <u>view II in your browser</u> . |
| To unsubscribe from the Barnel Cycling Campaign newsletter, please click here. |
| To unsubscribe from ALL LCC email lists, please <u>click here</u> . |
| © 2019 (domain.name) (domain.address) |

12. You can start adding text by clicking on the block that says 'INSERT YOUR CONTENT HERE' and typing or pasting your text. This will also bring up a new menu which allows you to change the style of the text.

| | Barnet Cycling Campaign news: June 2018 | | |
|------------------|---|-------------|--|
| [000 | Dear (contact link name) | 00] | |
| | Want to keep up to date with the latest news? Volt our website or follow us on Texter or Facebook | | |
| | Aboutus - Moothly methow - CodecLas | | |



13. You can add links by highlighting a section of text and click the 'Insert/edit link' button (the chain icon). This will bring up a new window where you can add the link URL. You can ignore the 'Title' and 'Target' fields.

| l. | | Dear (contact.first_name), B <u>X</u> <u>A</u> • <u>M</u> • — Formats • <u>X</u> INSERT YOUR CONTENT HERE | | | |
|----|-------|---|--|--|--|
| | Title | I CONTENT HERE I CONTENT HERE None About us - Monthly meetings Contact us You rendered the small because you're signed up Campaign news, If you can't see this small, pleas To unsubscribe from the Barnet Cycling Campaign Camp | n newsletter, please <u>click here</u> . | | |

14. You can add new blocks by clicking the 'BLOCKS' tab at the top left of the screen. The window on the left will show you all the different content blocks you can use. To add them to your email, simply drag and drop them where you want them.

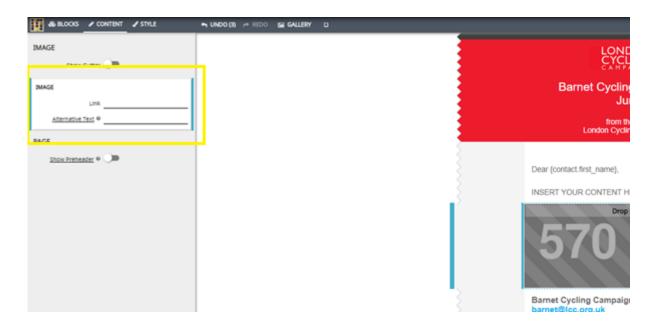




15. When you add an image block, click on the blue download icon at the bottom left of the block to upload an image. You can also click the blue wand icon at the top to toggle different image sizes.



With the image selected, you can add a link and alternative text (the text that will be appear when the image can't be displayed) in the 'Content' tab on the left.





16. The new system makes it easy to add buttons to your email. Buttons are a great way to make your links stand out, and can be used for your calls to action (e.g. 'Complete the survey', 'Book your ticket', etc.). When you add a button, you can edit the text by clicking onto it and add a link in the 'Content' tab on the left.

| A ROOS CONTENT / STILL NO | |
|---------------------------|---|
| UTTON BLOCK | EQUIDING CAMPAIGN DEWS: Barnet Cycling Campaign news: June 2018 Noti the local group of London Cycling Campaign in Barnet |
| | Dear (contact.thnt_name). HISERT YOUR CONTENT INCOM UNITION Barnet Cycling Campaign Barnet Black.org.uk |
| | Wated to a seep sop to date with the latest news? Void our seebaate of failure to of Facebook |

17. Hovering over an existing block will bring up a series of blue icons which allow you to delete the block (bin icon), duplicate the block (sheets of paper icon) and reposition it within the email (arrow icons).

| | Barnet Cycling Campaign news: June 2018 | |
|-----|---|----|
| | from the local group of London Cycling Campaign in Barnet | |
| 000 | Dear {contact.first_name}, | 20 |
| | Barnet Cycling Campaign <u>barnet@lcc.org.uk</u> | |
| | Want to keep up to date with the latest news? Visit our <u>website</u> or follow us on <u>Twitter</u> or <u>Facebook</u> | |
| | About us - Monthly meetings - Contact us | |

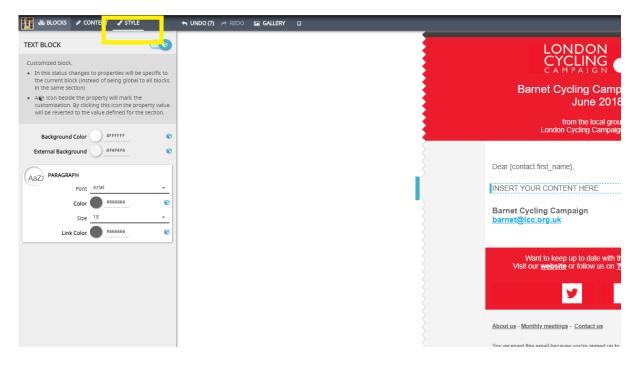


18. If you make a mistake, you can undo it by clicking the 'Undo' button on the top menu.

| 👔 & BLOCKS 🖌 CONTENT 🖌 STYLE | 🗢 UNDO (6) 🛹 RED(| GALLERY D | |
|------------------------------|-------------------|-----------|--|
| BUTTON BLOCK | | | |
| LINK | | | |
| Link | -1 | | Barnet Cycling Campaign news: |
| PAGE | | | June 2018 |
| Show Preheader 🛛 💭 | | | from the local group of London Cycling Campaign in Barnet |
| | | | |
| | | | Dear {contact.first_name}, |
| | | | INSERT YOUR CONTENT HERE |
| | | | B I Tokens - |
| | | | Barnet Cycling Campaign <u>barnet@lcc.org.uk</u> |
| | | | Want to keep up to date with the latest news? Visit our <u>website</u> or follow us on <u>Twitter</u> or Facebook |

19. You can change the background colours and font styles of a block by clicking the 'Style' tab in the window at the left of the screen. However, we strongly recommend sticking to the existing colours and styles, so you shouldn't need to use this tab unless you accidentally change something and need to change it back.

Within this tab, you can click on the blue icon at the top right to switch between global and block level styles. Global styles (the icon with three boxes) are the default styles for all blocks of that type, while block level styles (the icon with a single box) will only affect that one particular block.





20. When you've finished editing your email, click 'Test' at the top right. You can click 'Preview as HTML' to see a preview of the email in Civi, or enter your email address and click 'Send test' to see how it looks in your inbox.

(Please note you may see some dark lines across the email if you test it in Outlook. This is due to a bug with background colours in Outlook, and it shouldn't affect other email platforms. Changing the length of your email may get rid of the lines, but it's best not to worry about it too much as it's out of our control.)

| | Barnet Cycling Campaign news: June 2018 | |
|-------------|---|--|
| | from the local group of London Cycling Campaign in Barnet | |
| <pre></pre> | Dear {contact.first_name}, | |
| | INSERT YOUR CONTENT HERE | |
| | Barnet Cycling Campaign barnet@lcc.org.uk | |
| | PRILLET (COTOL PTRIV | |
| Ì | Want to keep up to date with the latest news? Visit our <u>website</u> or follow us on <u>Twitter</u> or <u>Facebook</u> | |
| | 🗹 🕴 | |

21. If you're happy with the email, click 'Close' at the top right (which will save your design). On the next page click 'Save draft' at the bottom right to save the mailing and bring you back to the main menu.

| · | | _ | | ۵ |
|---|---|---|--|---|
| | | | | |
| | Barnet Cycling Campaign news: June 2018 | | | |
| | from the local group of London Cycling Campaign in Barnet | | | |
| | Dear (contact first_name), | | | |
| | INSERT YOUR CONTENT HERE | | | |
| | Barnet Cycling Campaign <u>barnet@lcc.org.uk</u> | | | |
| | Want to keep up to date with the latest news? Visit our <u>website</u> or follow us on <u>Twitter</u> or <u>Facebook</u> | | | |
| | v f | | | |

Finally, email <u>conor@lcc.org.uk</u> and

fran@lcc.org.uk and tell us when you want it to



be sent out (remember, the earlier you put in your request, the easier it is for us to accommodate it). We may choose to make some edits, in which case we'll email you a copy of the updated version for you to approve.

22. If you want to save your email and come back to it later, click 'Close' at the top right to save it. Next time you log in to Civi, select 'Draft and Unscheduled Mailings' from the top menu. Find your mailing name on the list and click 'Continue'. On the 'Mailing' tab, click 'Continue' again to bring you onto the 'Design' tab. Here, you can hover over your template and click 'Edit' (clicking 'Reset' will delete your email and send you back to the template stage).

| ← → C | vicrm/mailing/browse/unscheduled?reset=1&scheduled=false |
|---|--|
| Quick Search Q Search Contacts Contributions Contributions Contributions Contributions Contributions Contributions | s 🛃 Mailings 🕼 Memberships 🕍 Reports Other <table-cell> 🖓 Administer 🗘 Support</table-cell> |
| Mailing Name Mailing Date any - Created or Sent by Mailing Status Scheduled Running Complete Paused Canceled Draft / Unscheduled | Archived Mailings Headers, Footers, and Automated Messages Message Templates From Email Addresses New SMS Send Email Find Mass SMS New A/B Test Manage A/B Tests New Mailing (Traditional) |
| Campaigns * Search Next > Last >> Mailings 1 - 50 of 224 | |

Top tips for writing emails to members

- Keep sentences simple and paragraphs short this makes them easier to read, especially on a mobile phone.
- Try to keep the overall length of the email short too. Only include the key points if there's any additional information you want to include, consider posting this on your website and including a link in the email.
- Try to keep the tone friendly and casual. Remember you're emailing fellow cyclists from your local community, so there's no need to be overly formal.

 Don't use jargon – or, if you really need to, make sure you explain what it means.
 Remember that many people on your mailing list will be casual cyclists who may know a lot less about the issues than you do.



- Make the 'call to action' (e.g. 'sign the petition', 'come to our meeting', etc.) easy to see and early in the text – people have short attention spans when it comes to emails
- Images can help engage people in your email, but only use them if they are relevant and of good quality. Try to make sure they're in landscape orientation (with the height shorter than the width), otherwise they'll look massive in the narrow email (especially on mobile).
- If possible, sign off the email with a name this makes the email more personal. At the very least, try to say something like 'Many thanks, Barnet Cyclists'.