# 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 fran@lcc.org.uk and conor@lcc.org.uk, 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 https://membership.lcc.org.uk/ 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 fran@lcc.org.uk or conor@lcc.org.uk 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.
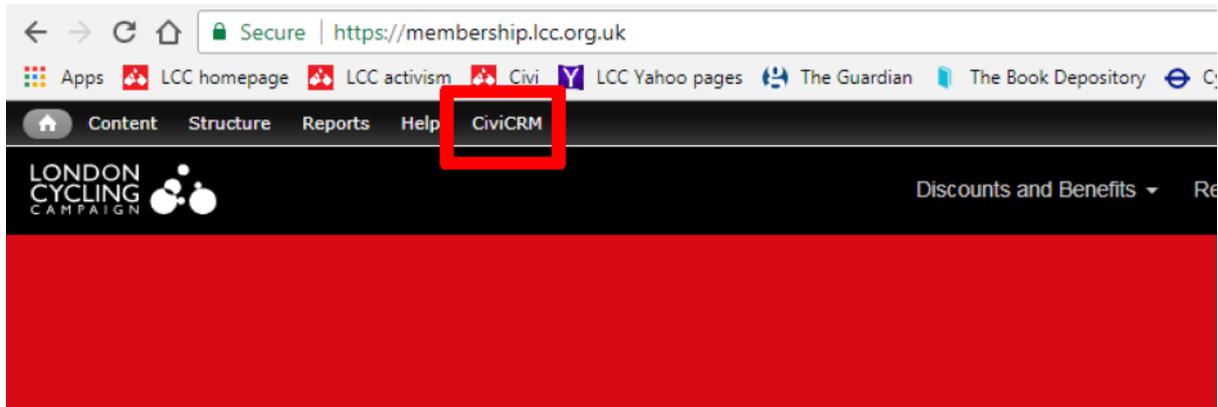


3. Once here, you need to click on 'Mailings' and then 'New Mailing' at the top of the drop-down box.
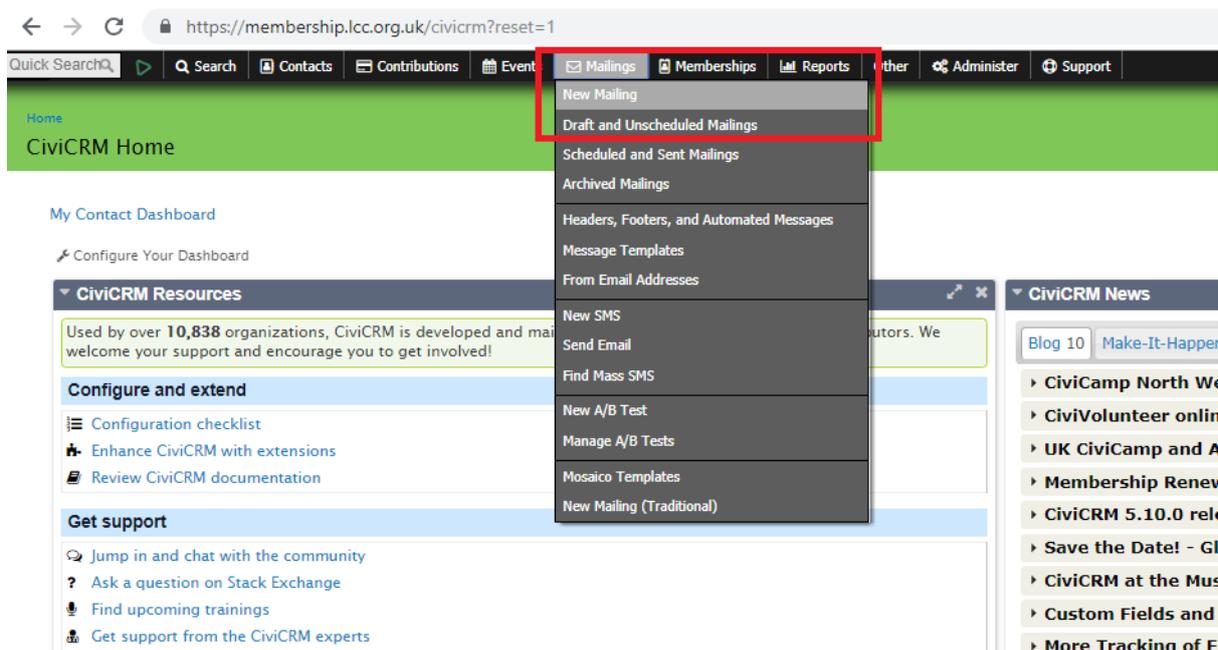
4. This will take you to the mailing page:
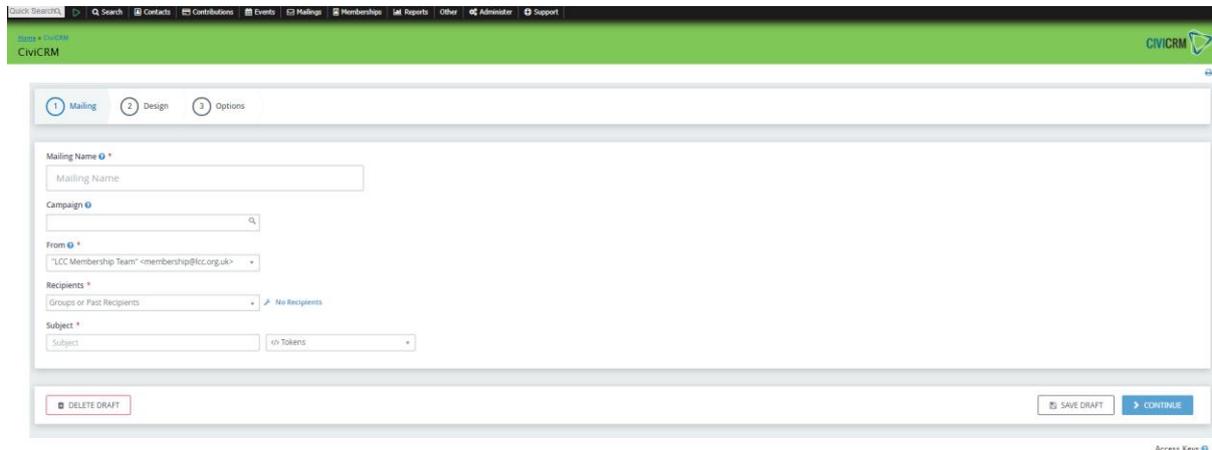


## Setting up your mailing

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.

7. 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).
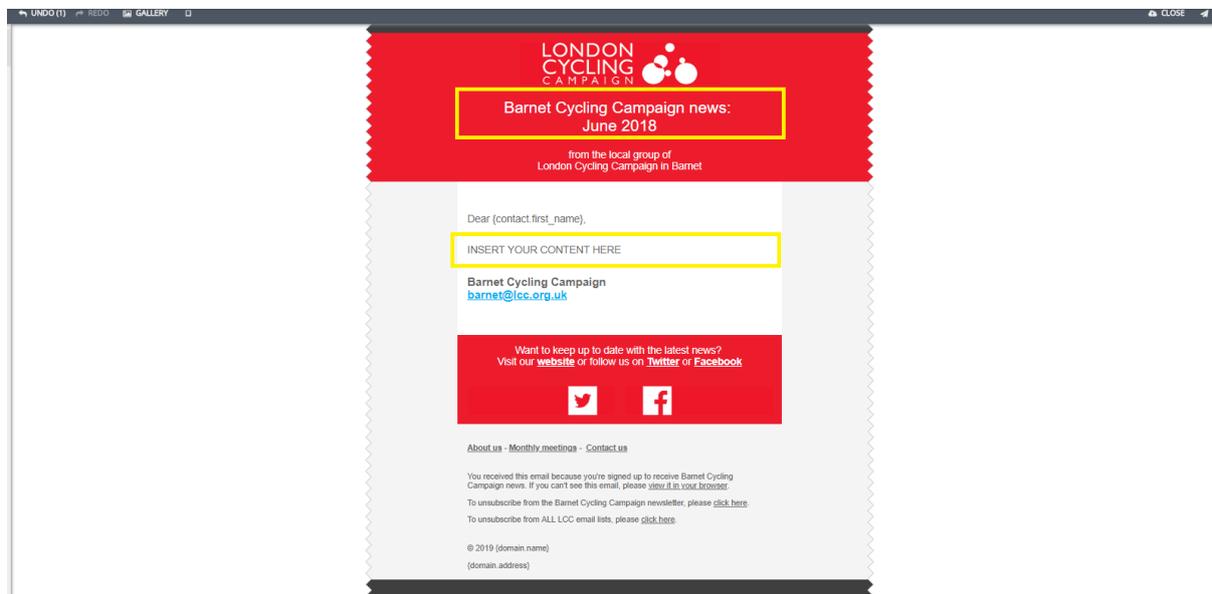


12. You can start adding text by clicking on the block that says 'INSERT YOUR CONTENT HERE' and typing or pasting your text. This will also bring up a new menu which allows you to change the style of the text.
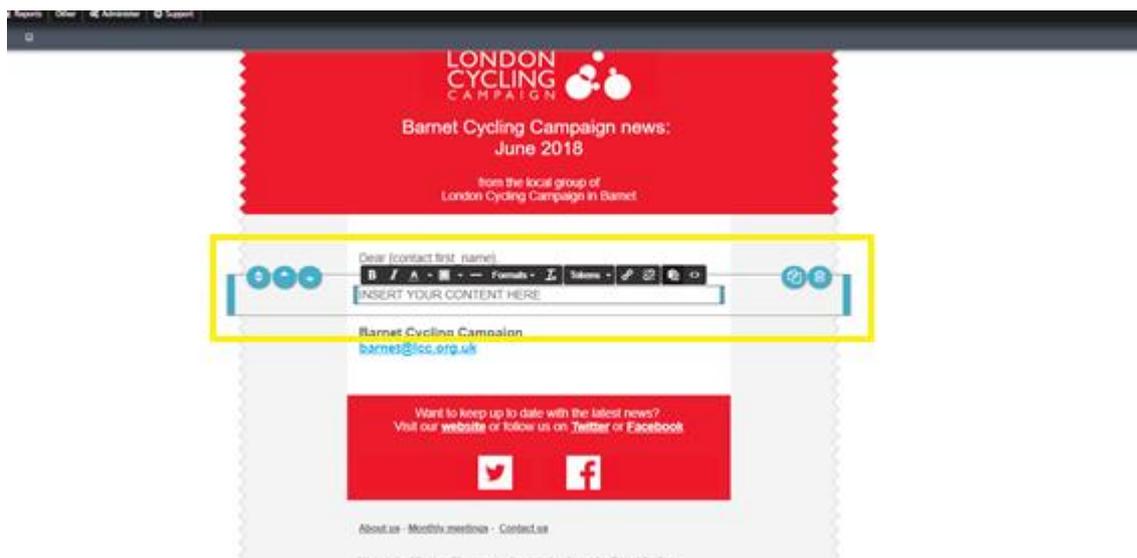
13. You can add links by highlighting a section of text and click the 'Insert/edit link' button (the chain icon). This will bring up a new window where you can add the link URL. You can ignore the 'Title' and 'Target' fields.
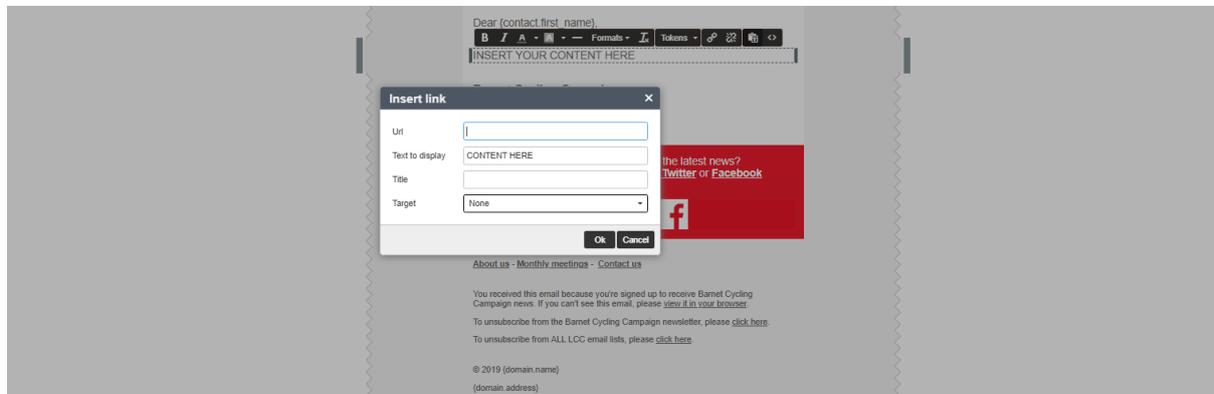


14. You can add new blocks by clicking the 'BLOCKS' tab at the top left of the screen. The window on the left will show you all the different content blocks you can use. To add them to your email, simply drag and drop them where you want them.
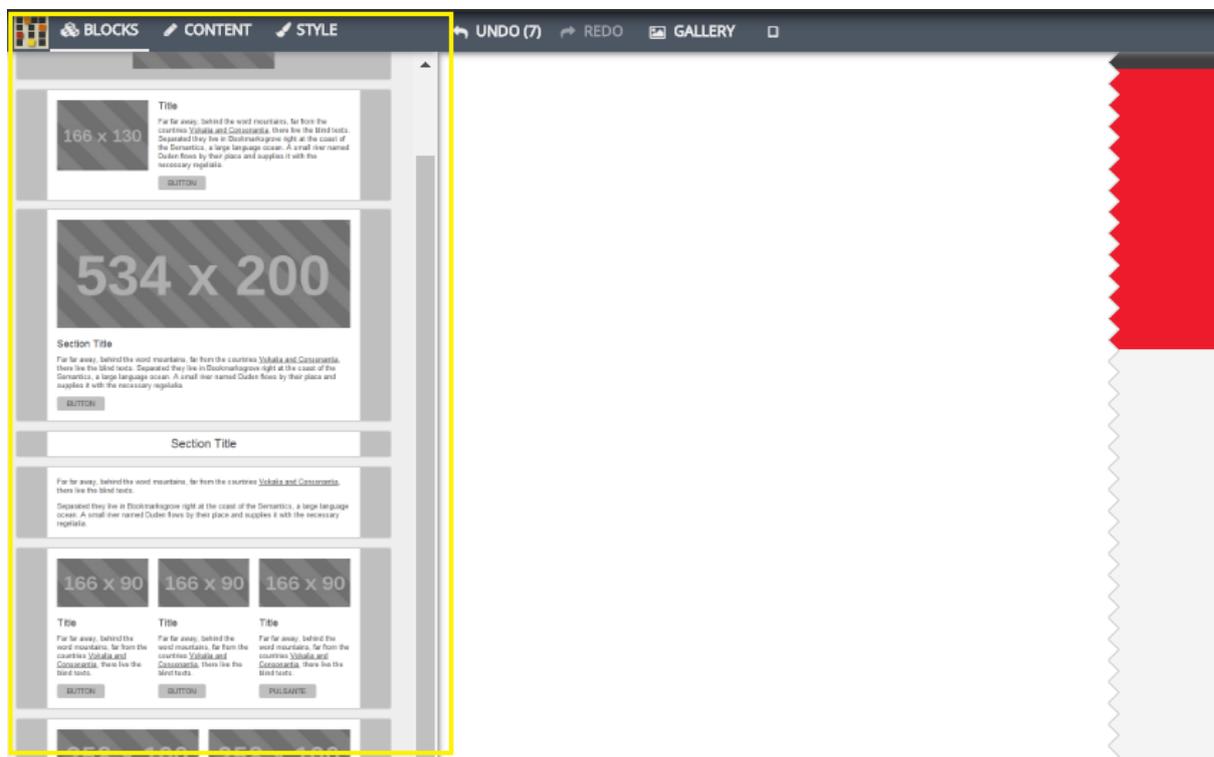
15. When you add an image block, click on the blue download icon at the bottom left of the block to upload an image. You can also click the blue wand icon at the top to toggle different image sizes.
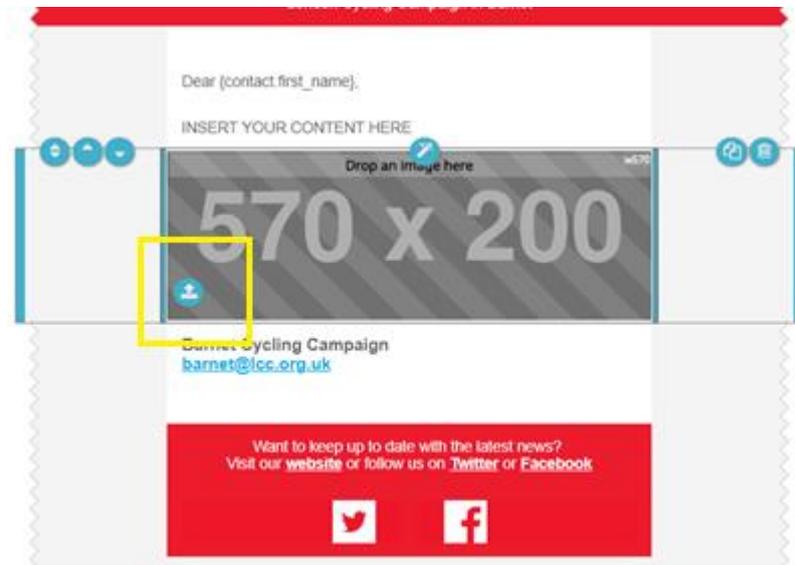


With the image selected, you can add a link and alternative text (the text that will be appear when the image can't be displayed) in the 'Content' tab on the left.
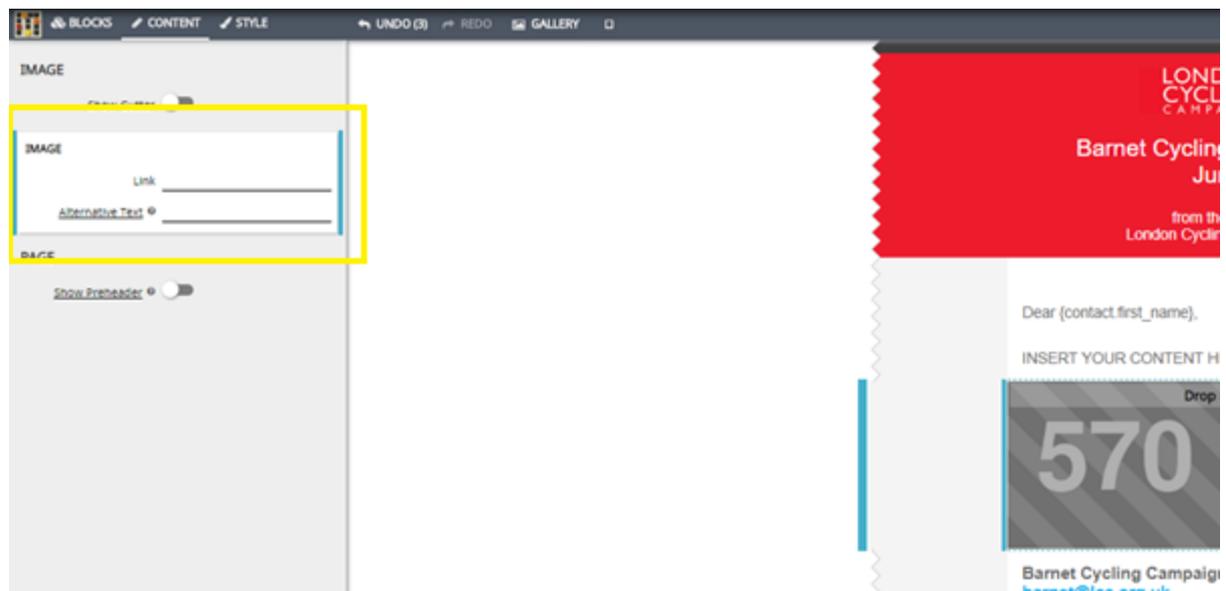
16. The new system makes it easy to add buttons to your email. Buttons are a great way to make your links stand out, and can be used for your calls to action (e.g. 'Complete the survey', 'Book your ticket', etc.). When you add a button, you can edit the text by clicking onto it and add a link in the 'Content' tab on the left.
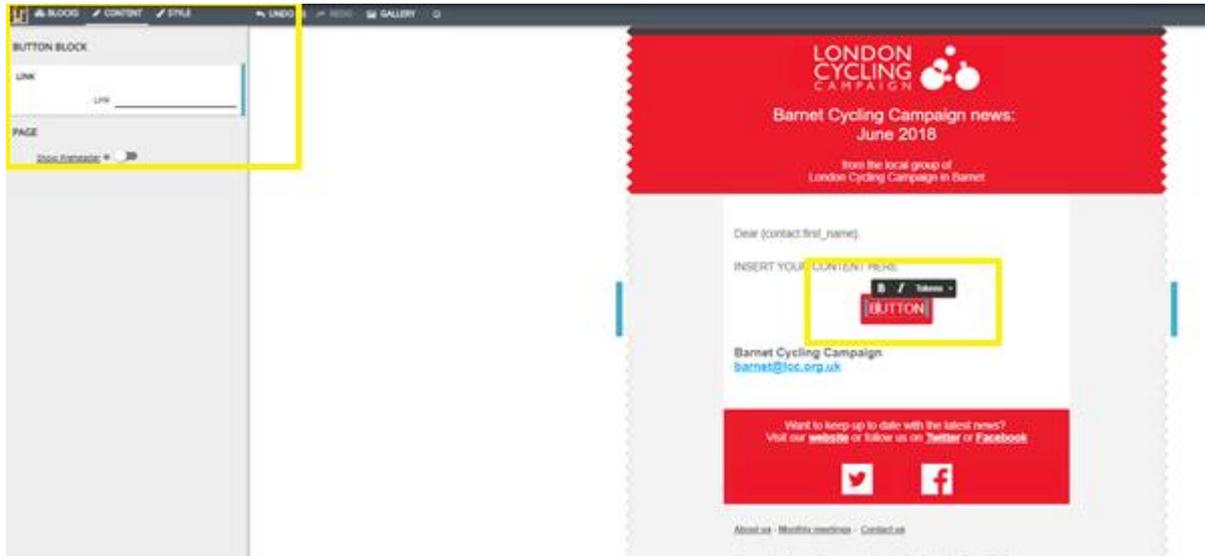


17. Hovering over an existing block will bring up a series of blue icons which allow you to delete the block (bin icon), duplicate the block (sheets of paper icon) and reposition it within the email (arrow icons).
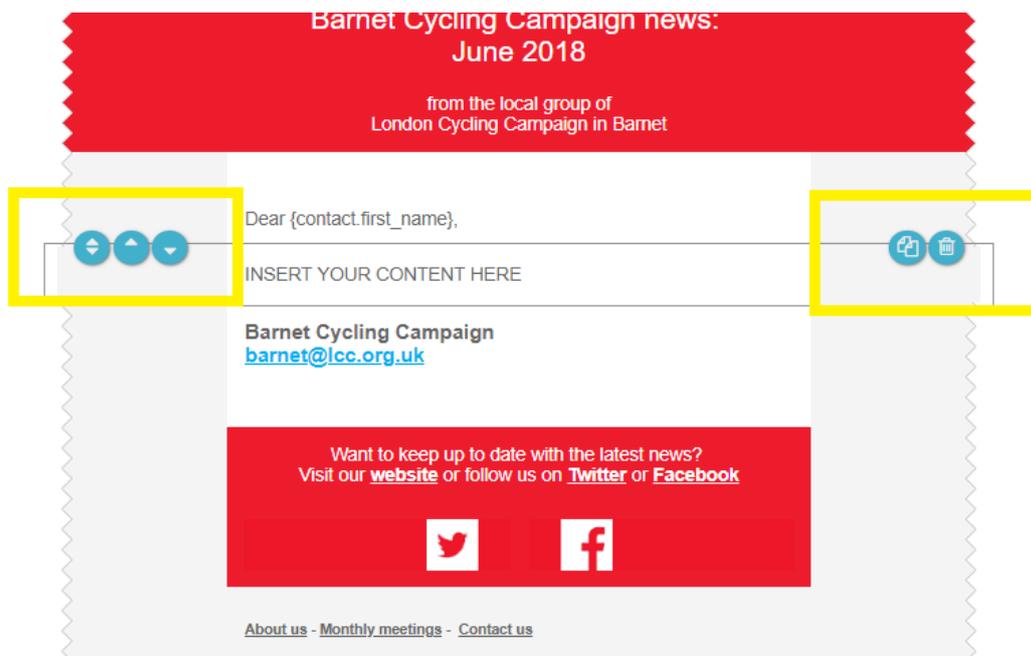
18. If you make a mistake, you can undo it by clicking the 'Undo' button on the top menu.
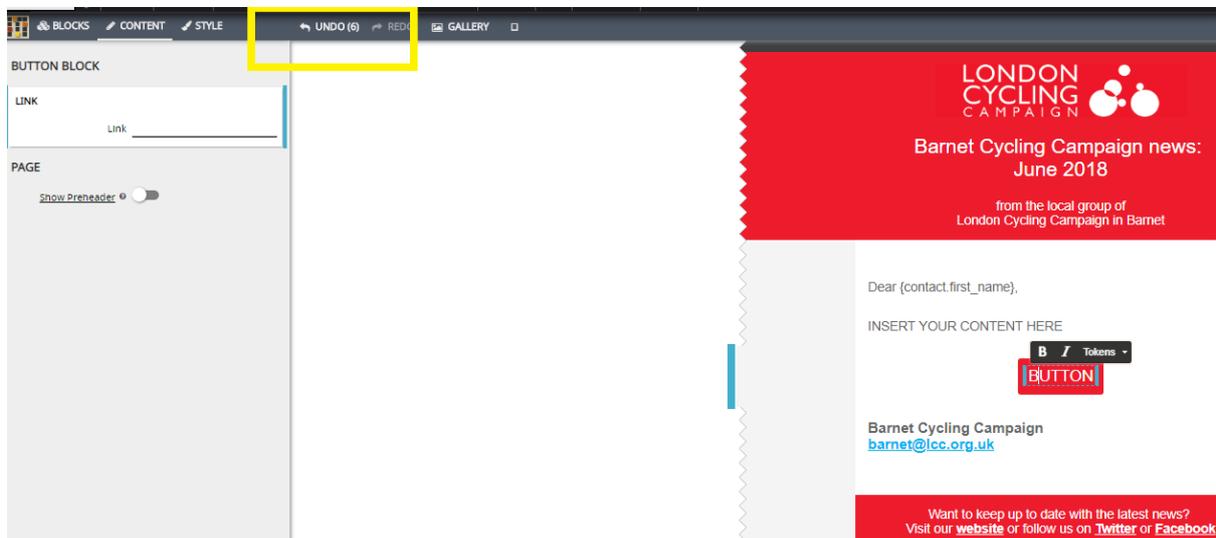


19. You can change the background colours and font styles of a block by clicking the 'Style' tab in the window at the left of the screen. However, we strongly recommend sticking to the existing colours and styles, so you shouldn't need to use this tab unless you accidentally change something and need 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.
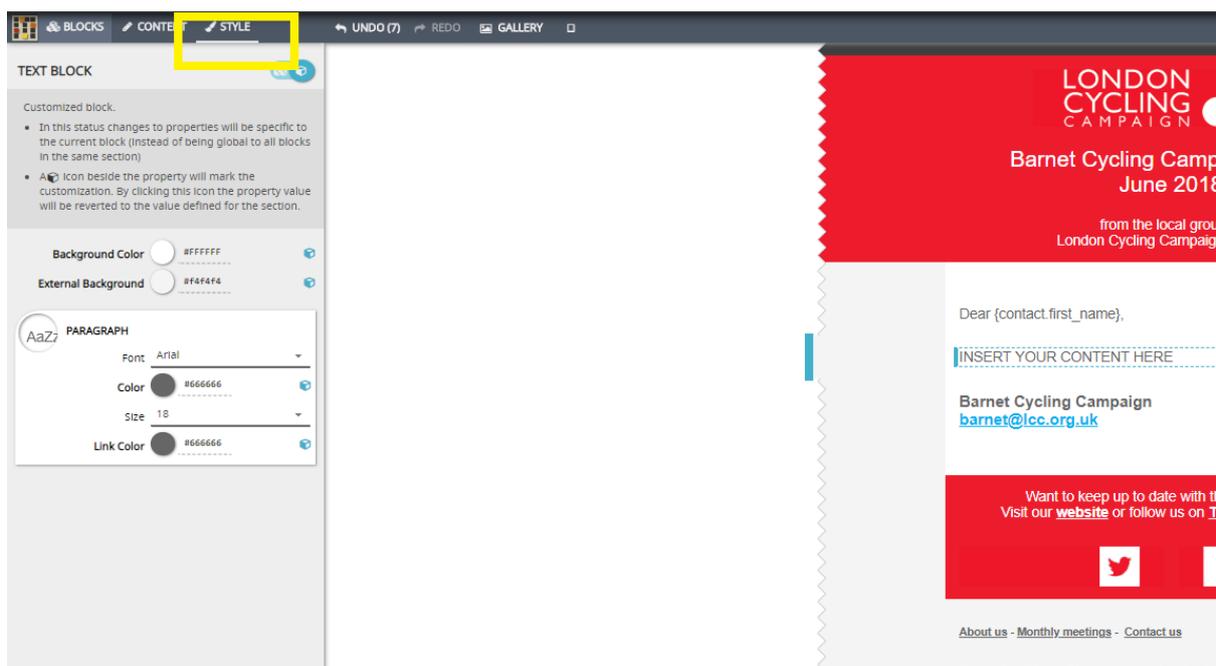
20. When you've finished editing your email, click 'Test' at the top right. You can click 'Preview as HTML' to see a preview of the email in Civi, or enter your email address and click 'Send test' to see how it looks in your inbox.

(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.)
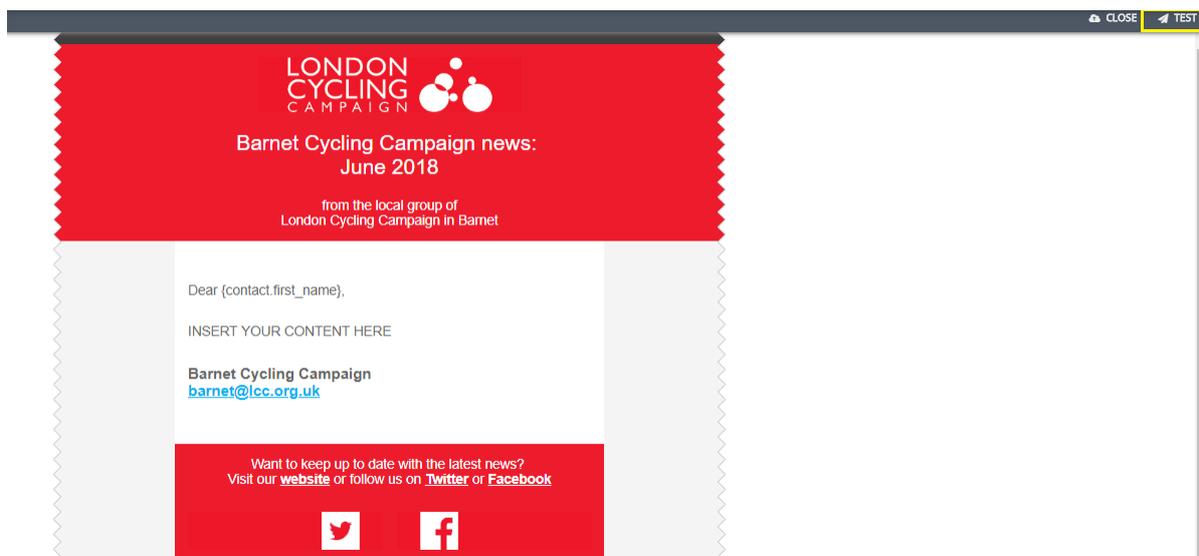


21. If you're happy with the email, click 'Close' at the top right (which will save your design). On the next page click 'Save draft' at the bottom right to save the mailing and bring you back to the main menu.
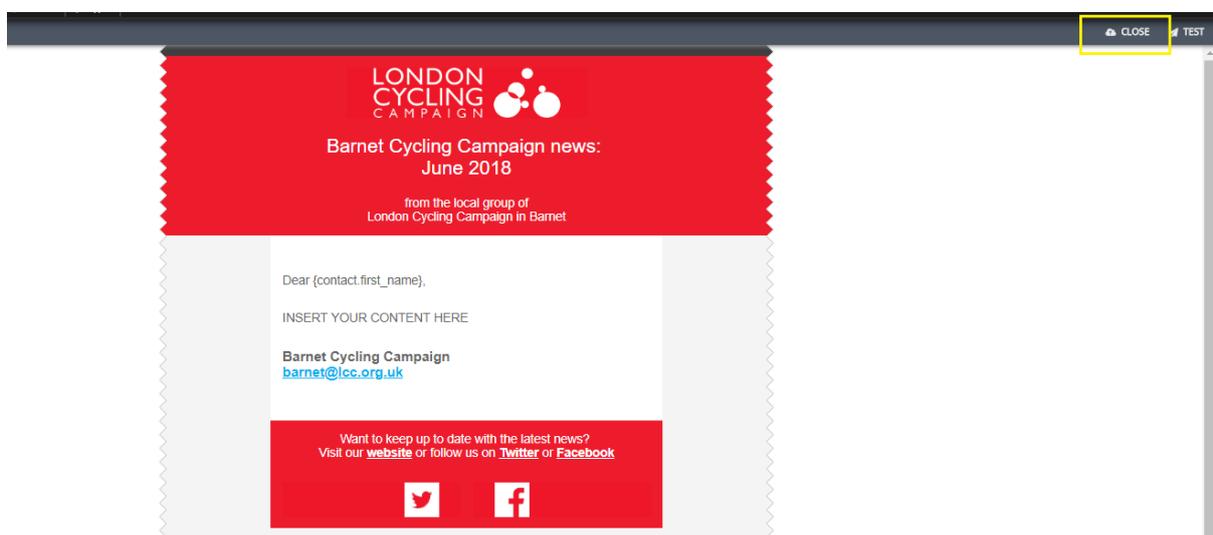
Finally, email conor@lcc.org.uk and
fran@lcc.org.uk and tell us when you want it to
be sent out (remember, the earlier you put in your request, the easier it is for
us to accommodate it). We may choose to make some edits, in which case
we'll email you a copy of the updated version for you to approve.

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).
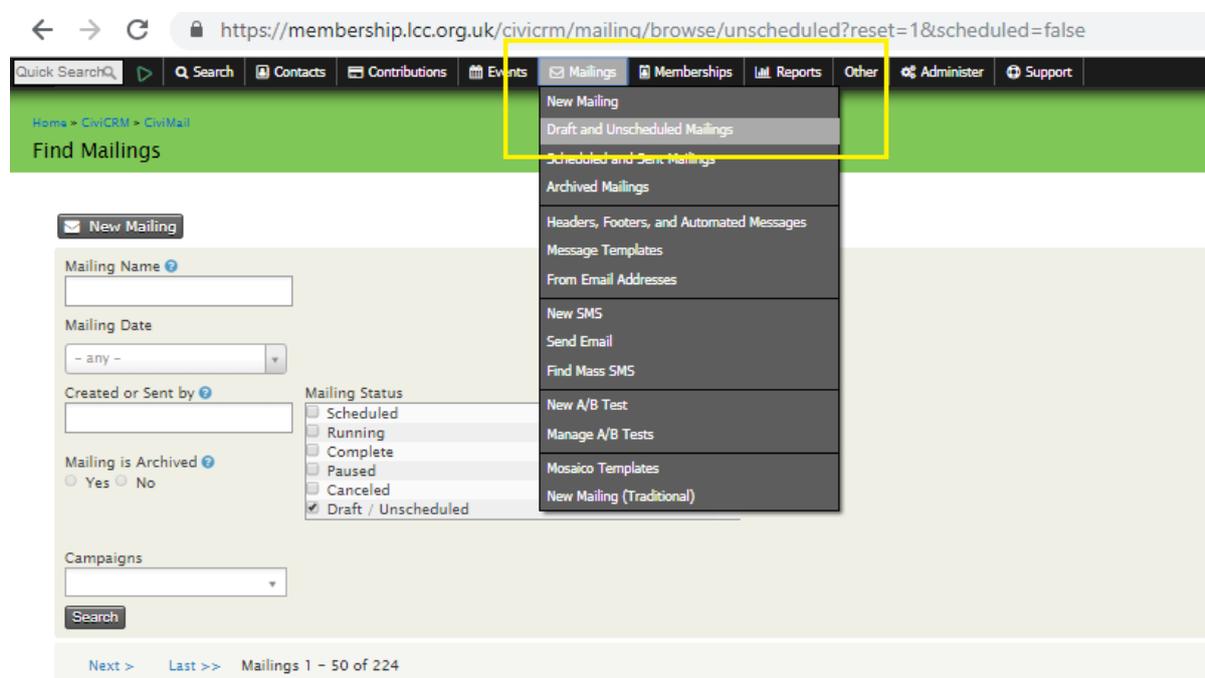


## Top tips for writing emails to members

- 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'.