

Sending Advancement Emails

Build email in CMS template

1. Login: <https://alumni.carleton.ca/wp/wp-admin/>
2. Hover over the Newsletter link in lefthand navigation and click Add Newsletter
3. Give your email a title
4. Click Custom and upload your banner (must be 768 x 336 pixels)
5. Add a Header (optional)
6. Add content to Text Area. You can type your newsletter directly into Wordpress, or paste it in from another application such as Word.
7. If you paste the content in: replace apostrophes, quotation marks, dollar signs and em dashes in wordpress (delete and re-add)
8. Click Publish

Prepare email list

1. Open up the list in Excel
2. Delete all columns except email address
3. Make sure the column heading is: EMAILAddr_
4. Save list as a CSV file

Send email in Lyris

Login to Lyris

1. Login: <https://lists.carleton.ca/> with your email and password
2. Make sure you are in the right list (e.g., [advancement-department](#))

Delete existing members

1. In the left menu, click `Members` and select `View Members`.
2. Click `Delete All Results` (black button at top right)
Important: Make sure `Don't delete list admins` is checked (usually is by default)

Import new members

1. Under `Members` menu, hover over `Add Members` and select `Import from CSV File`
2. Click `Choose file`
3. Select the CSV you file saved earlier
4. Stay on the page until the list is imported. A message will indicate it is done at the bottom.

Build and review email

1. In another tab, visit the webpage for the email that you built in your website
2. View the page source (right click)
3. Copy all of the code into your clipboard
4. In Lyris, click the home button and then click `New Mailing` (black button at top right)
5. Click `Disable the HTML editor`
6. Paste all of the source code into the HTML message area
7. Add name and subject for email
8. Click `Save and test` (bottom right)
9. Enter email address and send
10. Review email for errors and odd punctuation. Make sure links work correctly.

Send the email

1. Once finalized and ready to send, go to: Mailings > Approval > Need Approval
2. Click Send