SmartMail Lite: Messaging Members of Official Clubs

SmartMail is a messaging program that can be used to email groups of members within your membership module, or event registrants from the event module.

**SmartMail Lite**
- Allows official clubs to communicate through a more formal method than a basic distribution list
- Sends both html-formatted emails and text only emails
- Uploads addresses directly from the Stanfordalumni database, so that email addresses are always current
- Respects alumni privacy settings
- Allows for the uploading of an official group logo by SAA
- Can be sent at any time by club volunteers coded for SmartMail access by the club president.

### ACCESSING SMARTMAIL LITE

**Event Module**

To send an email to people who have registered for a club event through your club event module, log into your event module by going through the Volunteer Leader Resources menu within [http://stanfordalumni.org](http://stanfordalumni.org).

1. Once you have entered your event module, select the event you’d like to report on and click on the “Report Event” button at the top of the page.
2. Choose the report you would like to run from the "Web Reporting - My Report List" page. Click on the radio button next to the report and click the Run button.
3. The "Output Choices" window will appear. Select *Send Email to everyone on the report using SmartMail Lite* radio button and click the Run Report button.

### Membership Module

You can access Smartmail Lite and email your membership directly from the Manage Members page by clicking the "Email These Members" button at the bottom of the list. In this way, you can quickly email Current, Past, or Lapsed members -- or a filtered selection within those groups -- without having to run a report.
To filter for a select population to email, pull down the filter options within the specific membership subgroup (current, past, lapsed.) Below are sample filter options from the "current members" tab:

Volunteers can also select the entire membership from the "manage members" menu, accessed through the "Manage Group" link on your homepage.

From the manage members menu, one quickly click "Email group" to email via the membership tabs, or select the entire club members (past, current, lapsed) all at once by running a membership report. Please refer to the "Reporting" manual to learn more about membership reports.
CREATING A SMARTMAIL LITE MESSAGE

SmartMail Lite allows you to create html-formatted emails and send directly to your membership. Once you click "Email These Members" from a membership tab, or go through the "mange group" link to run a membership report or to use the Email Group function, you will be taken to the email creation screen. It is divided into several sections:

- Email Settings
- Email Content
- Text Only
- Sample email

Email Settings

**Email Type:** The email type is for categorization purposes on SAA's end. Ninety-nine percent of emails from groups can be categorized as "Invitation." Some clubs also send out periodic club newsletters, using the "newsletter" template.

**From:** The sender has the option to choose the "from" address of the email. The list is populated from the emails the sender has registered with SAA.

**Report Statistics:** This is an overview of the population who will receive the email, based on the membership group previously selected, or the filters set from a membership report.

The report shows how many people within the report population will actually receive the email. Emails are not sent if there is no email address on file for a recipient OR the recipient has opted not to receive club emails. The list of emails not sent can be found by clicking the "show names" link.(1)

**Email Actions:** Located on the right-hand menu, HTML and Text previews of the email are required before sending. The sender may also choose to close the window without completing the send process.

**Note:** at this time, emails cannot be saved. Make sure that your browser is set to accept pop-ups so that previews will not disrupt your email build.
The time-out feature has been extended for one-hour. Each time you send a sample email, the timer is refreshed, as well.

**Email Content**
You must build both an HTML-formatted email, and a simple-text version. HTML emails allow one to change font styles, hyperlink, align paragraphs, and features the club picture uploaded to the site. The HTML email is the default email – recipients will receive the HTML version if their email programs permit it.

The text version is simple text. It does not allow for hyperlinking, pictures, or font modification. The text version is sent to recipients who do not accept HTML-formatted email.

**HTML Creation**

**Custom Fields:** Note the custom fields menu on the upper-right hand(1). Custom fields allow the sender to personalize the subject line, title (or "banner"), and body of the email with the name and other information of the recipient.

To insert a custom field, place the cursor where the custom field should appear and then click the desired field. Note how the custom field "[firstname]" now appears in the body. Once sent, the recipient’s name will fill in this field.
Subject: The subject of the email. Key tips:
- Never forget the subject line. Emails without subjects are often deleted as SPAM.
- Include "Stanford" in the subject line so the email will not be dismissed
- Include the date of the event in the subject line so that the email is not overlooked

Title: The title of the email appears inside the email and should be brief yet catchy enough to keep the recipients reading. NOTE: A title that is too long will "break" the banner, extending beyond the limits of the uploaded club picture. For example:

Note how the cardinal-colored banner is larger than the picture on the left, creating a blank spot above and an overlap on the bottom. Keep your banner to three lines of text in order to avoid breaking the banner.

Email Content: The HTML formatted body of the email. Use the WYSIWYG editor to format text – no html-knowledge is needed. The editor allows the sender to format font, and edit text alignment.
Helpful Tips:

- If paragraphs automatically double-space, hold SHIFT+ENTER to force a single space return.
- Include the logistic details in their own paragraph – not in the body of the event description, as they are easily lost.
- Keep the event description short and catchy. Direct readers to an event webpage if the event has many details, such as parking, biographies, check payment instructions, etc.
- Include a contact for event questions.
- You can expand your html text view by clicking and dragging the right-hand corner of your html text box.
- **Do not forget an online registration link if you have set one up through your club event module.**
Hyperlinking

Links can be inserted as full web addresses (i.e. in http://www.linkcontinueshere.com format) or, for a cleaner look, as hyperlinks. Hyperlinking refers to inserting text in one location that links to another webpage. For example, instead of using the long string generated by a Google map, the word "map" can serve as the link to the mapping site.

To create hyperlinks:

1. Type the word (or sentence) that is to serve as the link
2. Select the word
3. Click the hyperlink icon beneath the Bold B function on the WYSIWYG editor (it appears as a chain.)

The link insert/edit box will pop up.

Link URL: copy and paste the entire web address here. This MUST include "http://" For example, if linking to the SAA homepage, www.stanfordalumni.org would fail. Only http://www.stanfordalumni.org would work.

Target: Choose whether the link should open in a new window or not.

Title: The title of the link. This title (basically a description) will appear when someone moves their cursor over the link word. This is helpful when the sender has created multiple links.

Class: the way the hyperlink font will be formatted. Several options are available.
Note the resulting link is in bright cardinal. Hovering over the link will make the link title appear.

To edit the link, highlight the link and press the hyperlink chain icon once more. To remove the link, press the chain-break icon.

**Event Links**

If online event registration has been created for an event through the an SAA club event module, the registration link can easily be inserted into the email with the Create Event Link function. If online event registration has been created for an event through the an SAA club event module, the registration link can easily be inserted into the email with the Create Event Link function.

Once selected, the create event link options will display:
Event: Select the corresponding event from the drop-down link.

Link Type: when online event registration is set up, three links are created: registration, who’s coming, and information.
- Registration leads directly to the online registration screen
- Who’s coming leads to a list of people who have RSVP’d
- Information leads to an optional “details” page (depending on whether this was completed during the online setup process. Note: this is rarely used as we encourage clubs to use the SAA event postings)

To send recipients to the online registration page, select "Registration"

Text: the text that will anchor the hyperlink.

Once these fields are completed, place the cursor in the body of the email where the link should appear, and press "Insert this Link." It will appear as {link1_text}. When the email is sent, that will be replaced with "Register Online Here."

Multiple event links can be created. Each link will display as {link2_text}, {link3_text}, etc.
Required before sending, the HTML and Text preview links are on the upper right-hand menu. You may preview at any time during the process. It's a good idea to preview often during the process. **Make sure you have turned off your browser's pop-up blocker.**

Note: If you have included a custom field, it will still say "Dear [firstname]" when you click the HTML Preview link. This will not change until the emails are actually sent to recipients. Do take the time, however, to click all links in your preview and make sure they work correctly.
Text Only Content

As previously mentioned, a text-only version is also required. This content can be identical to what is in the HTML format EXCEPT that all links must be written out.

Once completed, click Preview Text, making sure all links are written completely (13).

Send Sample Email and Complete Emails

It's very important to send sample emails before pressing the "Send Email" button. Only when a sample email is sent can the sender see if links, formatting, and custom fields have translated correctly once sent. Do not skip this step. Once sample emails are sent, and previews have been completed, press "Send Email" to finish.

Once sent, you will receive confirmation emails as the sending process is underway and finally sent through the Stanford email system.
You can save the SmartMail Lite email you are working on to ensure that you don't lose information if you are timed out of the system, or in case you can't finish the message and want to return to it later.

**Saving your Email**

SmartMail Lite will automatically save your email every three minutes. You may also manually save the email at any point by clicking on the *Save Email* or *Save and Close* buttons located at the top and bottom of the page. *Save Email* saves the email but keeps the page open so you may continue working. *Save and Close* saves the email and closes your browser window.

**Removing your Saved Email**

There are two ways to remove a saved email: (1) complete and send the email out or (2) click on the *Delete* button (either on the top or bottom of the page) if you decide to discard the email.

**Continuing a Saved Email after Exiting**

Where you find your saved email depends on how you originally built the email; whether you used the "email these members" shortcut button from the Manage Members page, or if you ran a report and chose "send email to everyone on this report" through the output options.

**From Manage Members page**

if you created the email from the **Manage Members** page through the "email these members" button, then there will now be two buttons at the bottom of the Manage Members page upon your return:
Resume editing of previously unsent email takes you back to the email you last saved. The population you originally selected does not change at this point. For example, if you originally had 35 members in your email population, you will continue to have those 35 members as your email recipients even though new members have joined since your last save.

Create new email to selected members takes the most recent population selected on the tab as the email population and starts a new email. The email that you previously saved will be removed and replaced by this new one.

Note: Each email is based on a unique log in and group. Listed below are examples of this rule.

- Joe Smith, from the San Diego Alumni of Color Club, creates and saves an unsent email. He plans to send it the next day. Judy Brown, also from the San Diego Alumni of Color Club, logs in to send an email. She won’t see Joe’s unsent saved email.

- Joe Smith wants to create two saved unsent emails for the San Diego Alumni of Color Club, but he can’t do this. SmartMail Lite will only allow one unsent saved email per log in per group. However, if Joe Smith wants to create a saved unsent email for the Stanford in Entertainment – Jobs group, he can do this because it’s a separate group.

Exception to the rule: Since the emails created from the Manage Members page are considered separate from the emails sent from Group Reporting, you can technically have three unsent saved emails under Manage Members (Current, Lapsed and Past tabs) and another one under Group Reporting for the same group. However, access to edit, delete and send these emails are still tied to the log in.

Once you successfully send out the email, the Email These Members button will reappear at the bottom of the Manage Members page.

From Group Reporting

Group Reporting

If you created the original email by running a membership OR event report and then selecting "send email to the people on this report using SmartMail Lite" from your output options menu, then there will be a be a new section called Pending/Saved Emails on the main reports page:

Pending/Saved Emails

Edit allows you to go back to your unsent saved email, but with a refreshed population. This is different from Manage Members. Under Manage Members, you have an option to continue with the original population or get the most current population. Group Reporting only allows you to have the most current population.
*Remove* deletes the unsent saved email.

**Note:** Each email is based on a unique log in, group and report combination. Listed below are examples of this rule.

- Joe Smith, from the San Diego Alumni of Color Club, creates and saves an unsent email. He plans to send it the next day. Judy Brown, also from the San Diego Alumni of Color Club, logs in to send an email. She won’t see Joe’s unsent saved email.

- Joe Smith wants to create two saved unsent emails for the San Diego Alumni of Color Club based on the same report, but he can’t do this. SmartMail Lite will only allow one unsent saved email per log in/group/report combination. If he tries to create another email through the same report, only the listed pending/saved email will display. However, if Joe Smith wants to create a saved unsent email for the Stanford in Entertainment – Jobs group using the same report, he can do this because it’s a separate group.

- Joe Smith wants to create two saved unsent emails for the Austin Club. He uses the Club Membership Summary Report for the first email and the Club Membership Detail Report for the other. SmartMail Lite does allow this because they are different reports.

**Exception to the rule:** Since the emails created from the Manage Members page are considered separate from the emails sent from Group Reporting, you can technically have three unsent saved emails under Manage Members (Current, Lapsed, Past tabs) and another one under Group Reporting for the same group. However, access to edit, delete and send these emails are still tied to the log in.

Once you have successfully emailed out all the unsaved sent emails, the Pending/Saved Emails section will disappear.