

Quick Start Guide To:

Sending an Email in Excel

- Have the worksheet open that contains all or some of the email addresses that you wish to send to
- Click on the orange E icon in the toolbar of Excel
- To make last minute changes to your template content, click Reports/Edit button at the bottom

To...

- To choose who in the worksheet you want to send your email to, you have two options. Either send to ALL contacts in the worksheet or send to a selection of previously highlighted email addresses in the worksheet
- If you choose to "Send to Selection", you will want to highlight the emails you want by holding Ctrl on the keyboard and then selecting who you want to send to with your mouse. It is always easiest to just keep multiple worksheets where you send to everyone listed within each individual worksheet, as opposed to having one massive worksheet and making selections.
(Tip – You will want to have within the first three header columns at least one header titled "Email", and then add "First Name", "Last Name" or all three if you need to. Be sure that there are no spaces between the header row and the first contact's information. Also, be sure that the header titles match up exactly with the mail merge tags in your email.)

Content

- From the drop down box next to the Email Template: , select the email template that you would like to send out
- Next enter a subject line for your email
- If your template contains a mail merge of [[SPE Personal Message]], you can enter a message next to the Message: text. If you don't have this, don't know what it means, and want to learn more, please see the Quick Start Guide To: Mail Merging
- To preview exactly what the email will look like, click the Preview button on the right

Sending

- After completing all of the steps above, click the Next button in the lower left
- Verify the contacts and click Next
- An internet browser will now pop-up with a preview of the email and the final two send options up top
- The SwiftNotify box will enable sending emails to you, the first time your email is opened by a recipient, in a campaign that is to 15 people or less
- The Copy To Yourself box will send you a copy of the email that you are about to send to your list
- You can either choose to do the Send Email button and send the email at that time or click the Schedule Send option, where you can schedule that email and list to go out at a specific date and time, up to two months out. After making this selection you are done