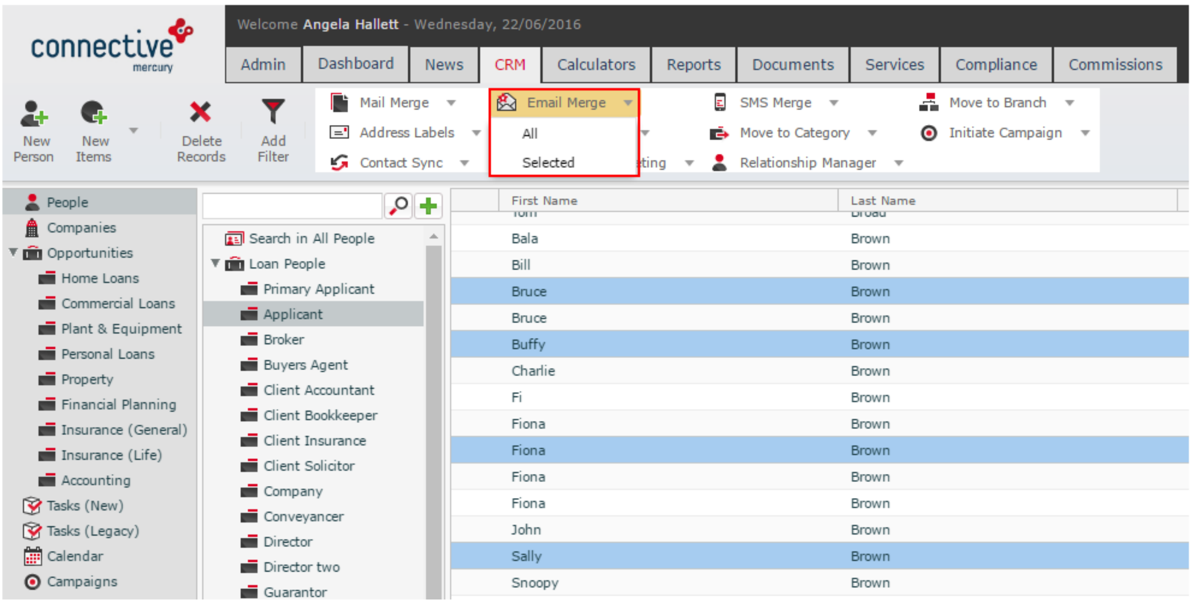
Instructions – Sending the Royal Commission Response email to your clients.

Table of Contents

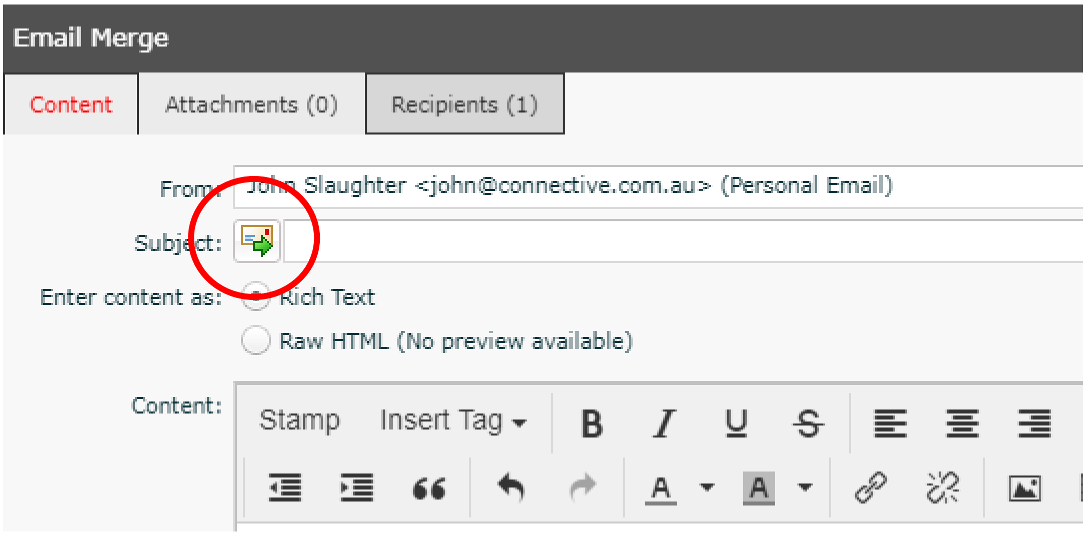
Mercury

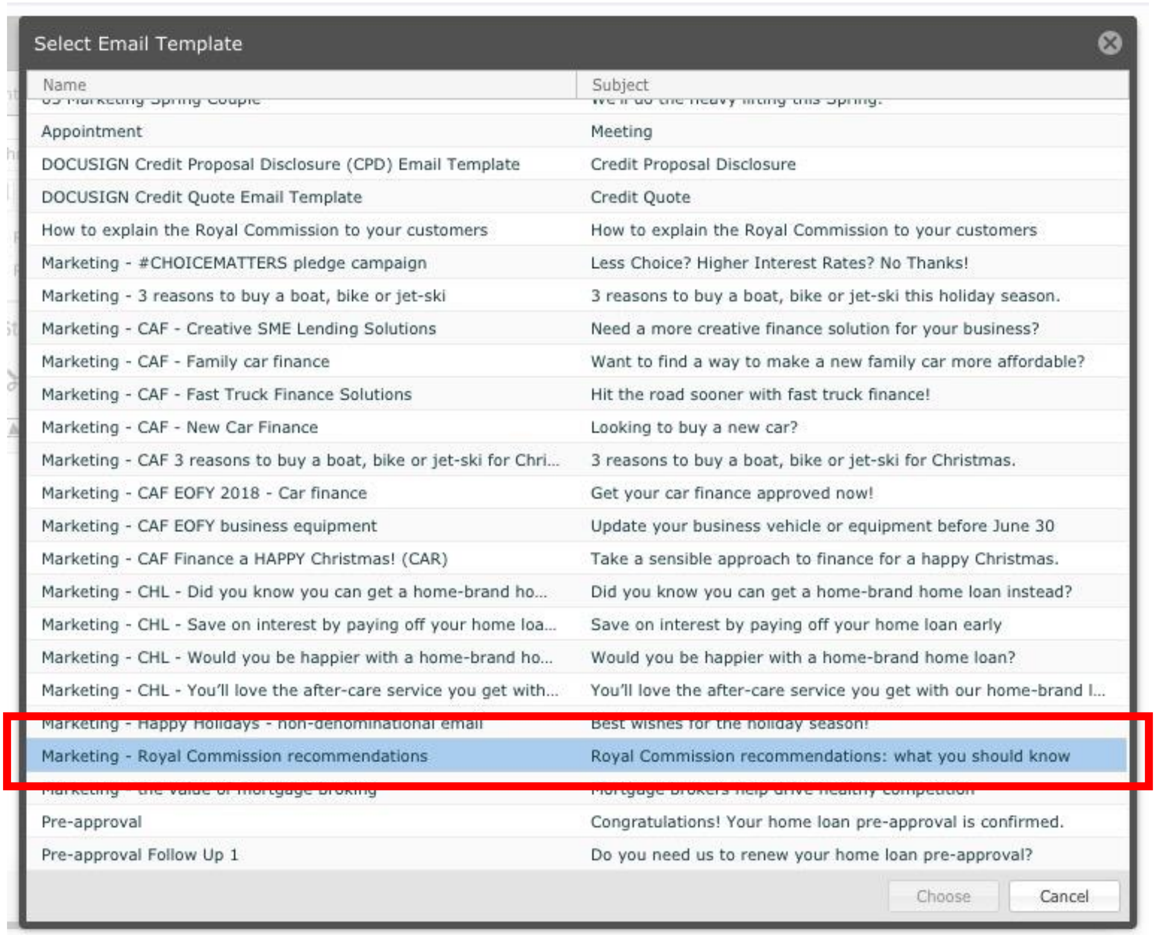
1. In the **CRM** tab, highlight the people you would like to email (you can select multiple at one time by holding down Ctrl and clicking on the names). If you would like to email all your contacts go to step 2.

2. Click the **Email Merge** drop-down list. Choose **All** or **Selected**. If you click **All**, it will merge to everyone listed in the CRM.



3. Click **Apply Email Template** button to apply the "**Marketing - #Royal Commission Response"** template a which has already been created.

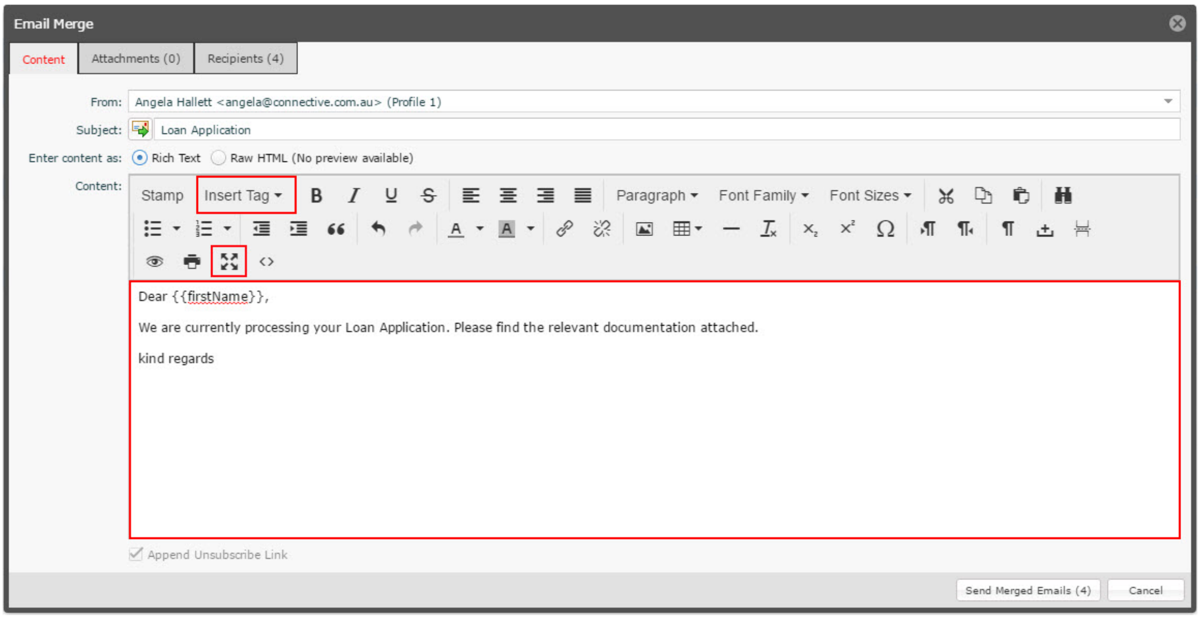




4. Insert tags from the **Insert Tag** drop-down list.

   Tags allow you to personalise your email, so it addresses each recipient by their first or full name. Clicking on the tag will insert the tag wherever your cursor is currently located in the email.

   - **Note**: You can click on the **Full-screen** button to expand the email merge window into full size.



5. Click the **Recipients** tab to review each recipients message.

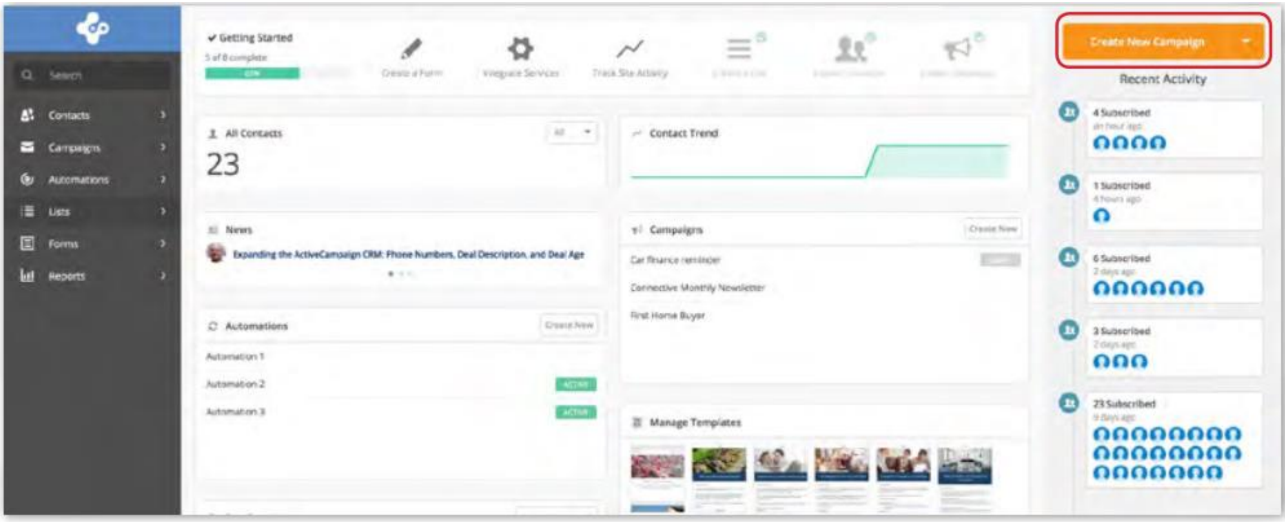
6. Click **Send Merged Emails** to send.

Contact your BSM or Helpdesk@connective.com.au if you have any issues.

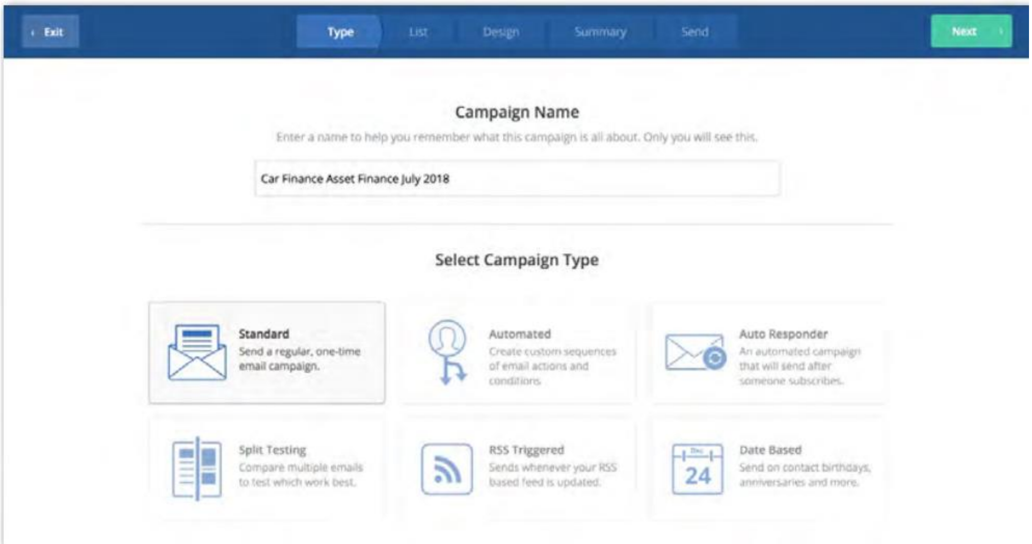
Digital Marketing Hub

You can follow the campaign wizard, so you don’t miss a step.

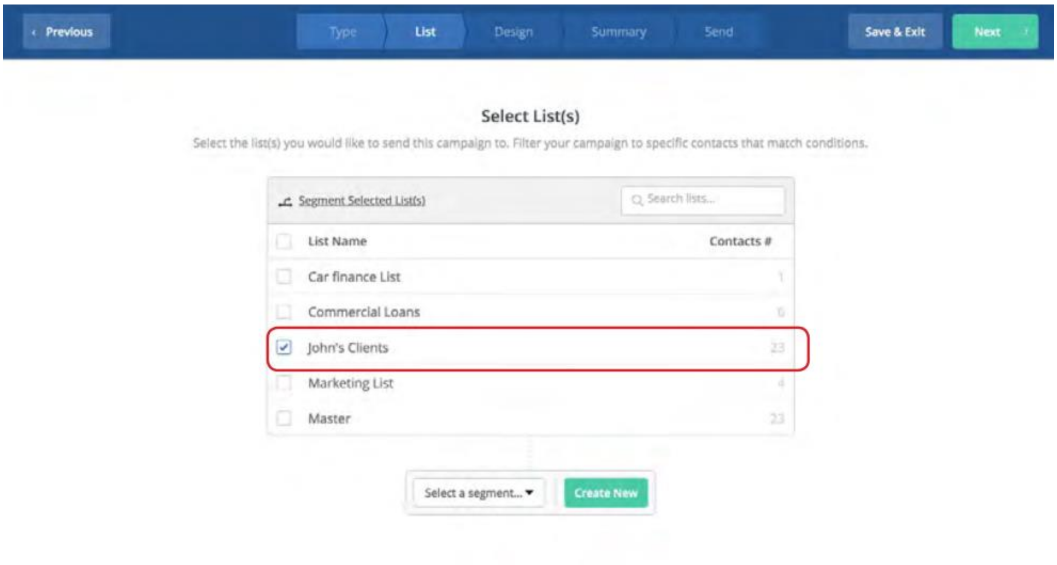
1. From the home Navigation page, click on **Create New Campaign** located at the top of the screen. Alternatively, click on "Campaigns" in the sidebar and click "New Campaign" at the top right of the screen.



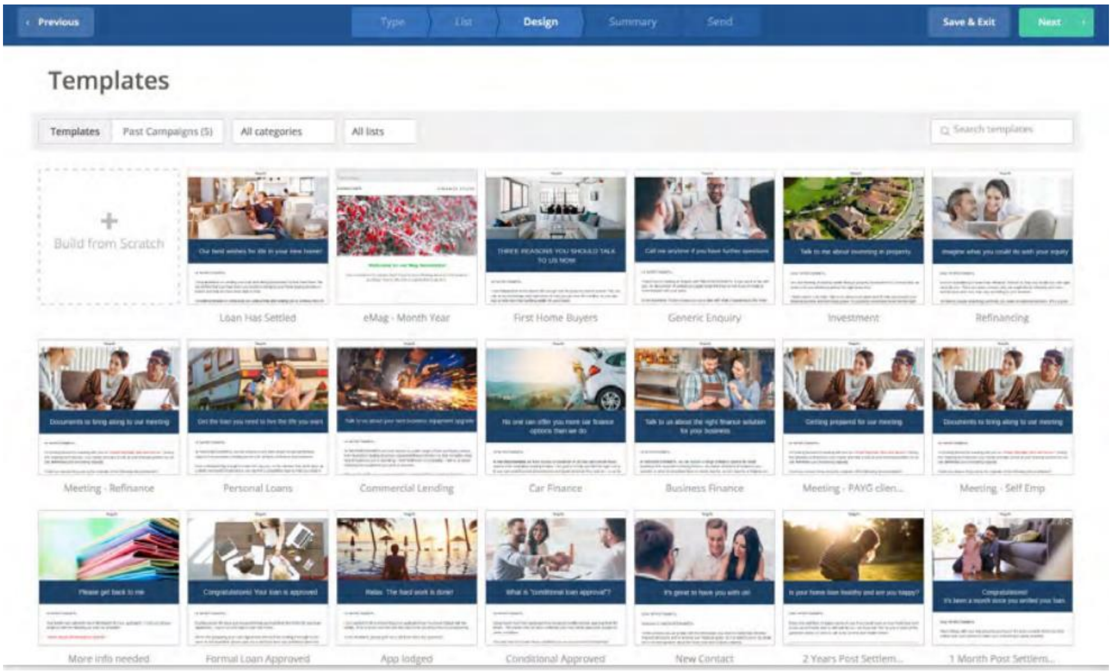
2. Name your campaign.



3. Select the list of contacts who you wish to receive the campaign. You must have already created the list and added contacts to that list.

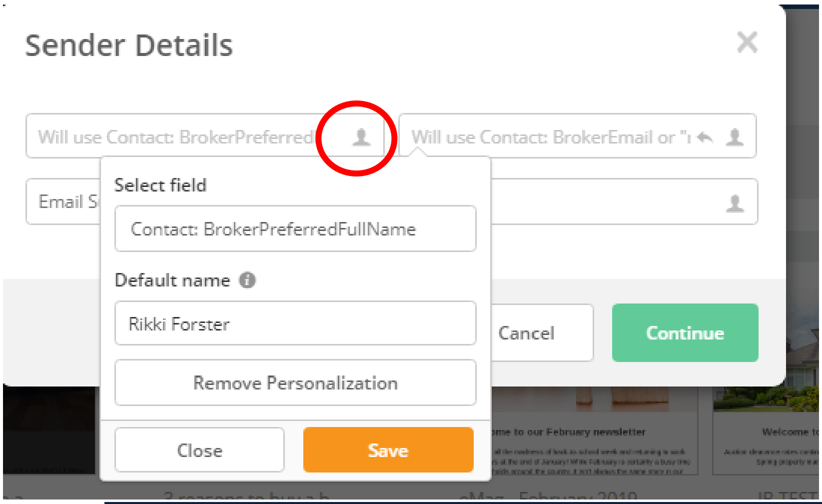


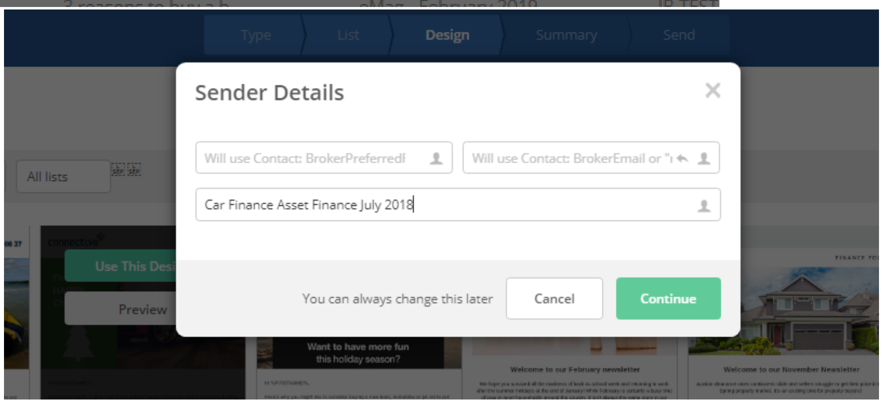
4. Select the **#Royal Commission Response** template design from the library to use as the basis for your email.



5. Select the **person icon** to select the **'broker preferred full name'** (who the email is coming from), & **'broker email'**. Then check that the **'default name'** & **'default email'** (so a client can respond) are correct.

   This way, if there is no Relationship Manager assigned to a contact, the email will be sent from the default Relationship Manager.

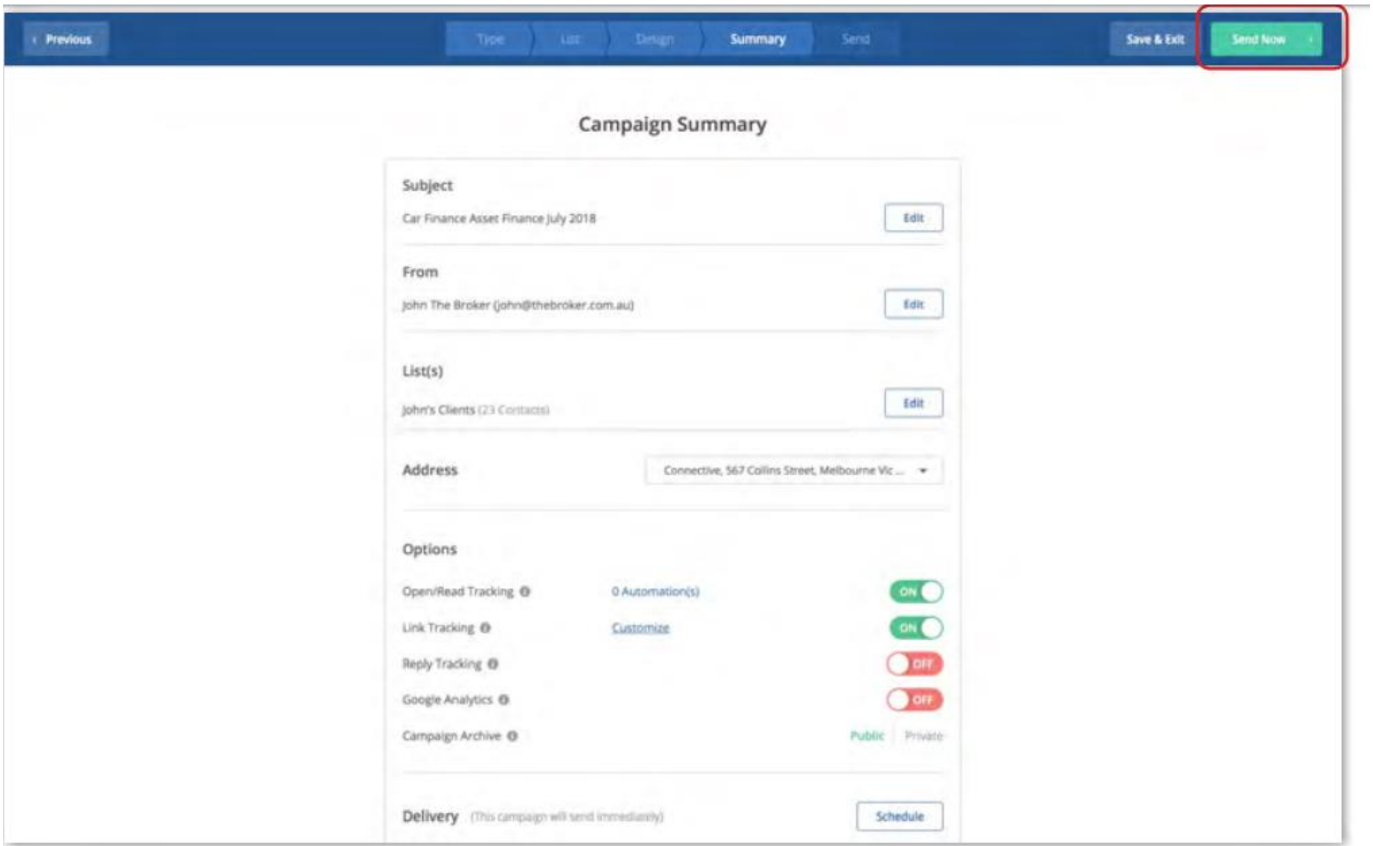




6. Once the email is complete, review all details on the campaign summary screen.

Tip: Always send a test to yourself, before you send the email to your clients! You can do this from the email summary page.

7. To send the campaign, click on the Send now button at the top of the screen.



Contact your BSM or Marketing HUB marketinghub@connective.com.au if you have any issues.