

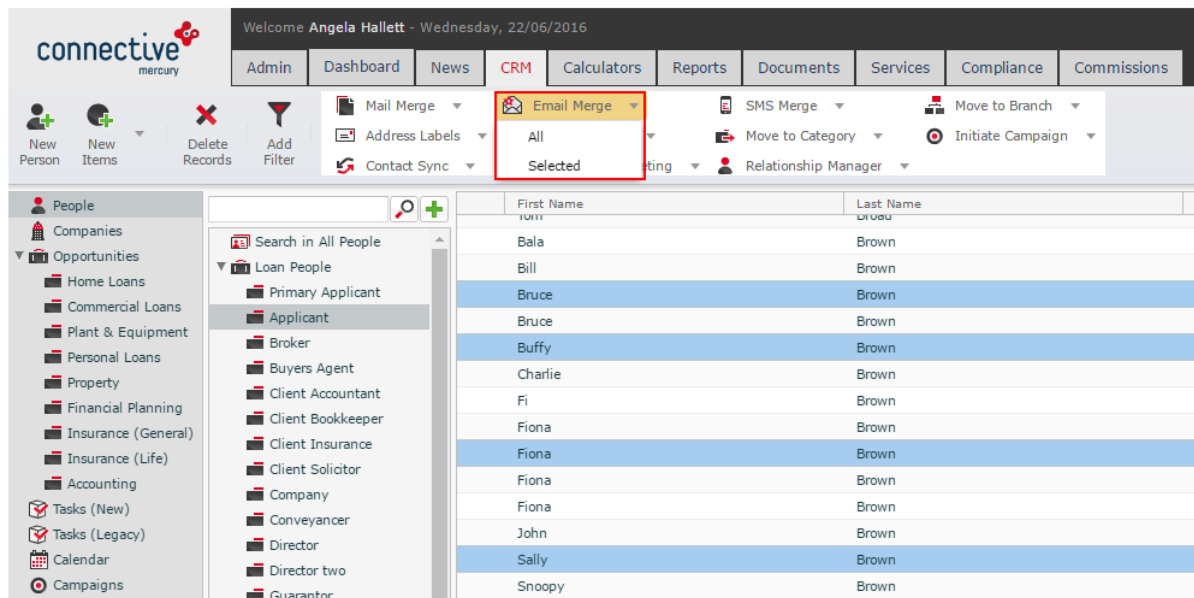
# Instructions – Sending the Royal Commission Response email to your clients.

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## 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.

**Email Merge**

**Content** Attachments (0) Recipients (1)

From: John Slaughter <john@connective.com.au> (Personal Email)

Subject: 

Enter content as:  Rich Text  
 Raw HTML (No preview available)

Content: Stamp Insert Tag ▾ **B** *I* U ~~S~~ [List Icon] [List Icon] [List Icon]

[List Icon] [List Icon] “ ” ↶ ↷ A ▾ A ▾ [Link Icon] [Unlink Icon] [Image Icon]

Select Email Template

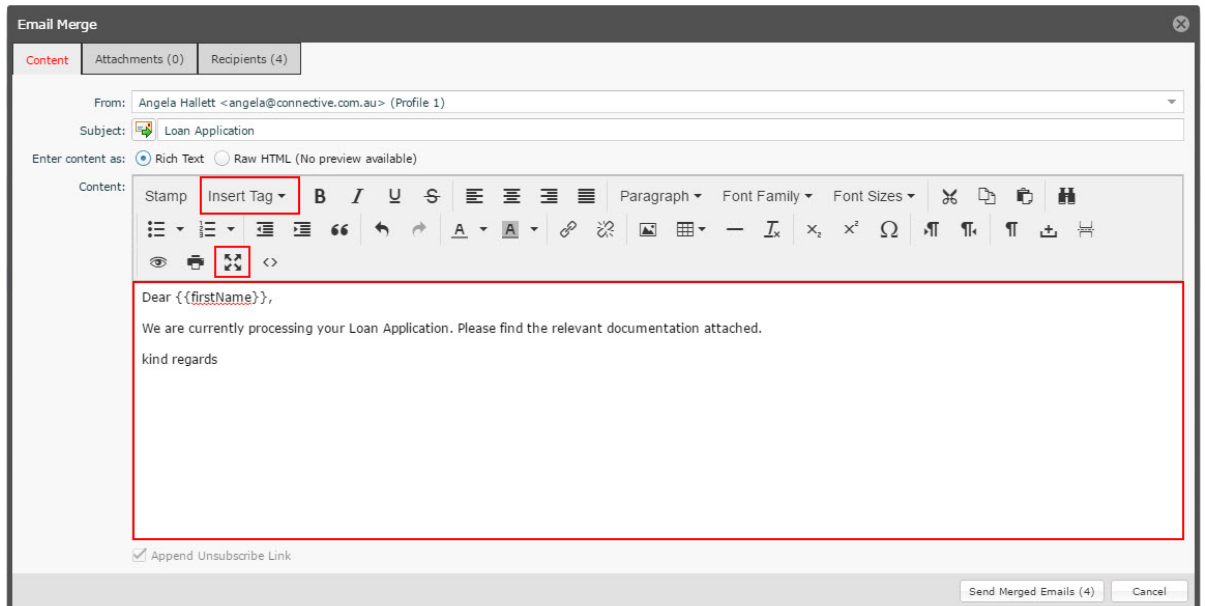
Name	Subject
Marketing - Spring Couple	We're do the heavy lifting this Spring.
Appointment	Meeting
DOCUSIGN Credit Proposal Disclosure (CPD) Email Template	Credit Proposal Disclosure
DOCUSIGN Credit Quote Email Template	Credit Quote
How to explain the Royal Commission to your customers	How to explain the Royal Commission to your customers
Marketing - #CHOICEMATTERS pledge campaign	Less Choice? Higher Interest Rates? No Thanks!
Marketing - 3 reasons to buy a boat, bike or jet-ski	3 reasons to buy a boat, bike or jet-ski this holiday season.
Marketing - CAF - Creative SME Lending Solutions	Need a more creative finance solution for your business?
Marketing - CAF - Family car finance	Want to find a way to make a new family car more affordable?
Marketing - CAF - Fast Truck Finance Solutions	Hit the road sooner with fast truck finance!
Marketing - CAF - New Car Finance	Looking to buy a new car?
Marketing - CAF 3 reasons to buy a boat, bike or jet-ski for Chri...	3 reasons to buy a boat, bike or jet-ski for Christmas.
Marketing - CAF EOFY 2018 - Car finance	Get your car finance approved now!
Marketing - CAF EOFY business equipment	Update your business vehicle or equipment before June 30
Marketing - CAF Finance a HAPPY Christmas! (CAR)	Take a sensible approach to finance for a happy Christmas.
Marketing - CHL - Did you know you can get a home-brand ho...	Did you know you can get a home-brand home loan instead?
Marketing - CHL - Save on interest by paying off your home loa...	Save on interest by paying off your home loan early
Marketing - CHL - Would you be happier with a home-brand ho...	Would you be happier with a home-brand home loan?
Marketing - CHL - You'll love the after-care service you get with...	You'll love the after-care service you get with our home-brand l...
Marketing - Happy Holidays - non-denominational email	Best wishes for the holiday season!
<b>Marketing - Royal Commission recommendations</b>	<b>Royal Commission recommendations: what you should know</b>
Marketing - The value of mortgage broking	Mortgage brokers help drive healthy competition
Pre-approval	Congratulations! Your home loan pre-approval is confirmed.
Pre-approval Follow Up 1	Do you need us to renew your home loan pre-approval?

Choose Cancel

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.

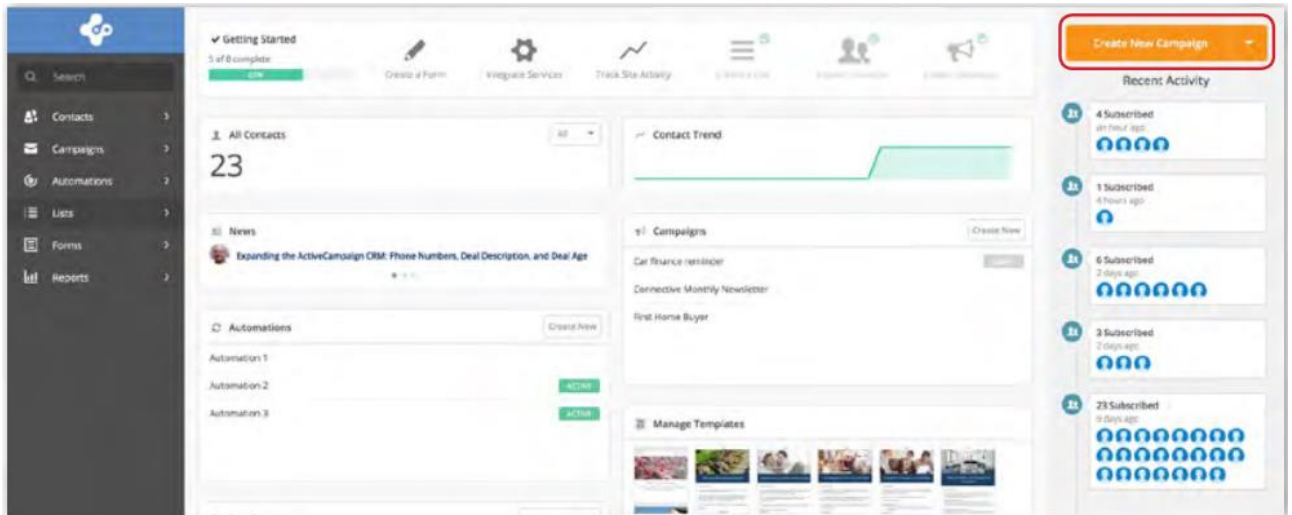
6. Click **Send Merged Emails** to send.

Contact your BSM or [Helpdesk@connective.com.au](mailto:Helpdesk@connective.com.au) if you have any issues.

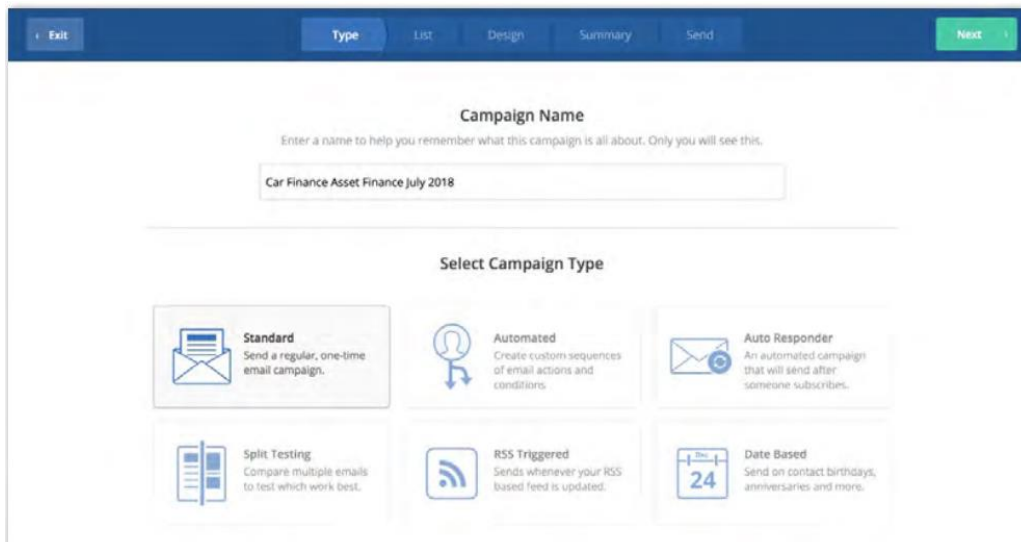
# Digital Marketing Hub

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

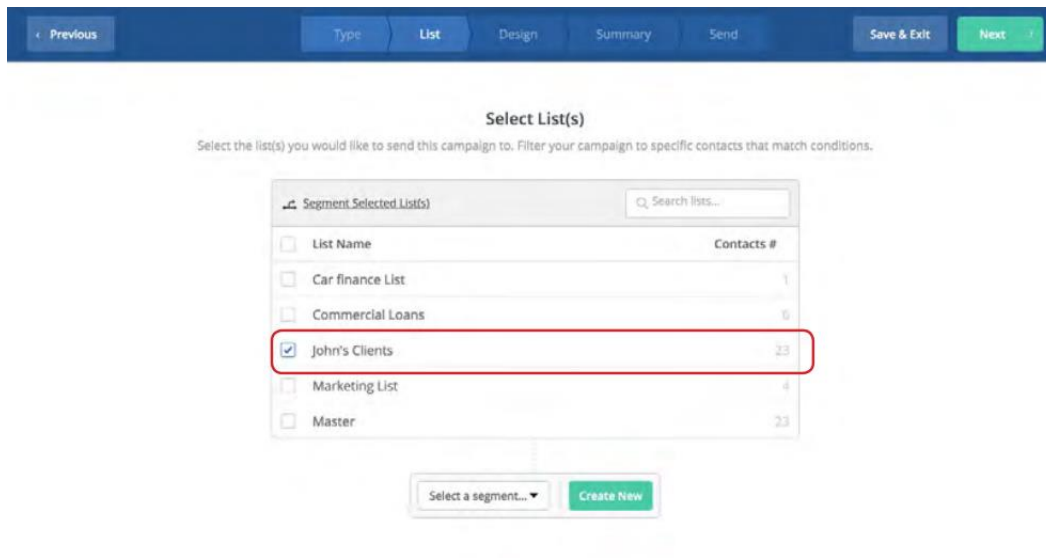
1. From the home Navigation page, click on **Create New Campaign** located at the top of the screen. Alternatively, click on "Campaigns" in the sidebar and click "New Campaign" at the top right of the screen.



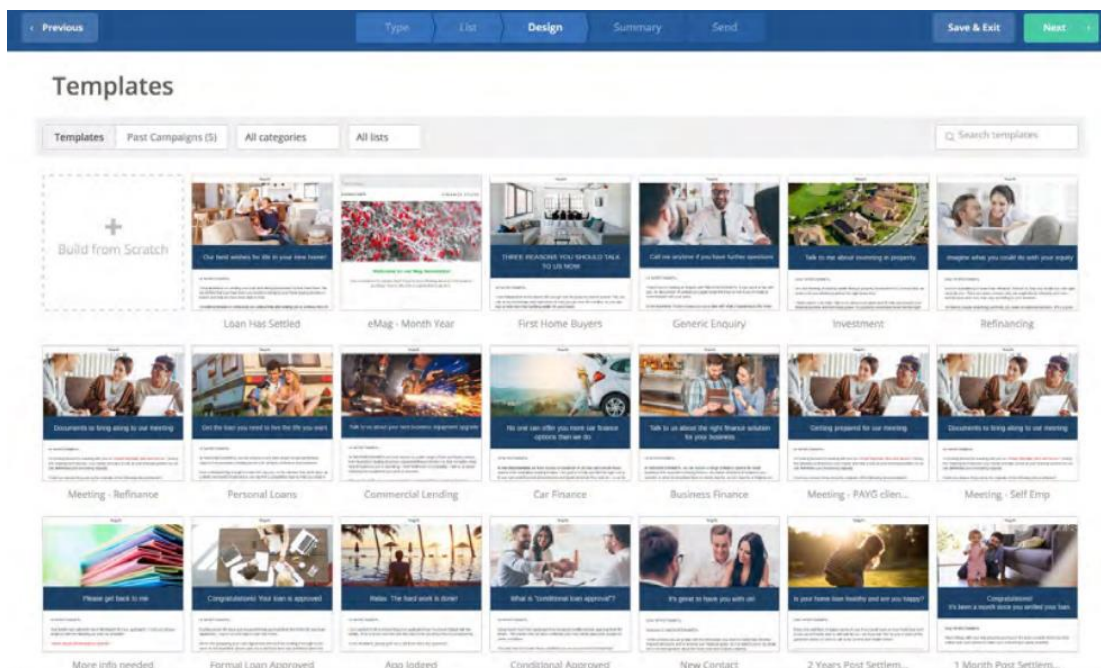
2. Name your campaign.



- 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.

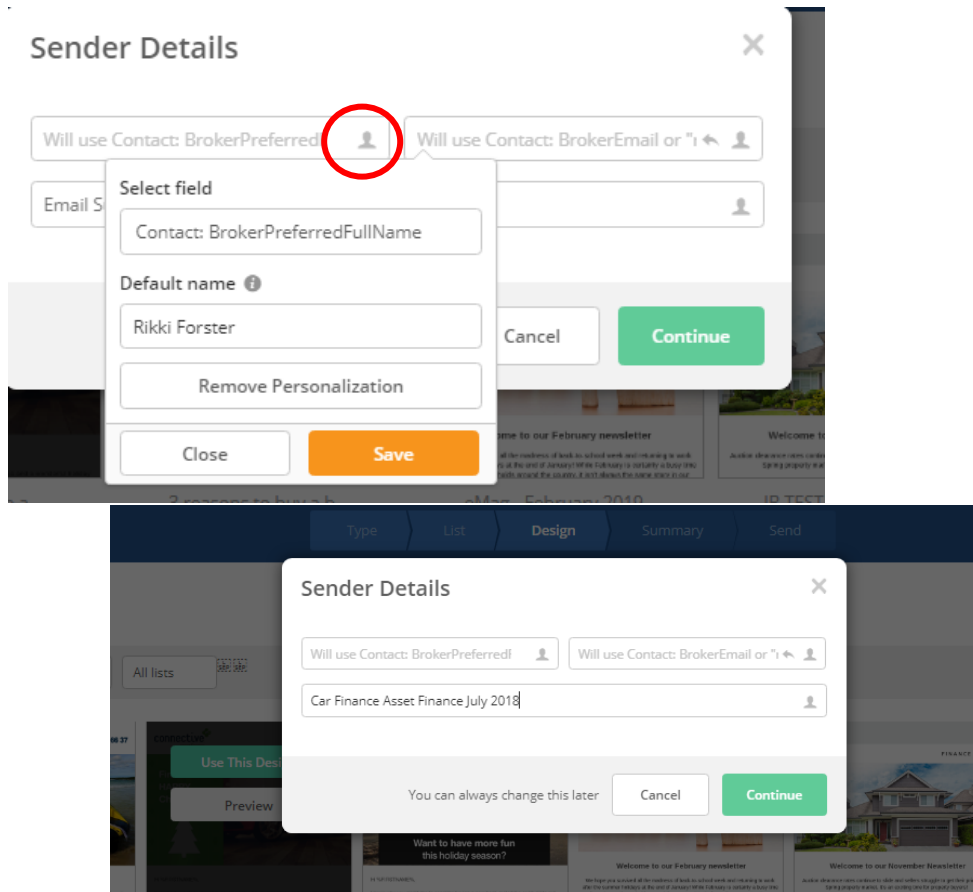


- Select the **#Royal Commission Response** template design from the library to use as the basis for your email.



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.

The screenshot shows the 'Campaign Summary' interface. At the top, there is a navigation bar with buttons for 'Previous', 'Type', 'List', 'Design', 'Summary', 'Send', 'Save & Exit', and 'Send Now'. The 'Send Now' button is highlighted with a red box. Below the navigation bar, the 'Campaign Summary' section contains the following details:

- Subject:** Car Finance Asset Finance July 2018 (with an 'Edit' button)
- From:** John The Broker (john@thebroker.com.au) (with an 'Edit' button)
- List(s):** John's Clients (23 Contacts) (with an 'Edit' button)
- Address:** Connective, 567 Collins Street, Melbourne VIC ... (with a dropdown arrow)
- Options:**
  - Open/Read Tracking: 0 Automation(s) (ON)
  - Link Tracking: Customize (ON)
  - Reply Tracking: (OFF)
  - Google Analytics: (OFF)
  - Campaign Archive: Public Private
- Delivery:** (This campaign will send immediately) (with a 'Schedule' button)

Contact your BSM or Marketing HUB [marketinghub@connective.com.au](mailto:marketinghub@connective.com.au) if you have any issues.