

# Sending an Email to Your Chapter Through Neon CRM



## Instructions

Log into Neon at <https://www.z2systems.com/np/clients/vnps/login.jsp>

If you do not yet have a login, please contact us at [vnps.org@gmail.com](mailto:vnps.org@gmail.com).

## OVERVIEW

In Neon, you will:

- Create the email to be sent, and save it.
- Schedule the email to go out at a specific time or right away.
- Send it to the Audience (set of members) of your choice.

### Choose **Communications > Email Audiences**.

You don't need to do anything first with the email audience, but if this is your first time sending an email from Neon, have a look at this page.

Note that some audiences have been created for you ahead of time! You don't need to worry about 'addressing' the email; Neon will dynamically pull a list of the active members of your Chapter for you.

*So, you can move onto creating your actual email.*

## CREATE YOUR EMAIL

### Choose **Communications > Email Campaigns**.

In Marketing, a 'Campaign' is something more complex, for our purposes just think of it as an 'email'.

When you visit this page, you'll see a list of past Campaigns; the list will grow over time as we make more use of Neon and send communication from it.

Choose **Build New Campaign Email**, the tab at the top left.

Campaign Emails [Help](#)

[Build New Campaign Email](#) [Upload Campaign Email](#) [Campaign Email Settings](#)

**Email Drafts**

Action	Name	Update Time
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Mark as Ready</a>	VNPS Invite for Online Account	08/22/2017
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Mark as Ready</a>	Draft PT President Message	07/16/2017


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**Emails Ready to Send**

Published emails made from V2 templates are available to be copied below.

Action	Name	Update Time	Updated By
<a href="#">View</a> <a href="#">Delete</a>	South Hampton Roads Campaign	08/15/2017	Suzanne Dingwell
<a href="#">View</a> <a href="#">Delete</a>	Potowmack Wakefield Park with the Grass Bunch	07/17/2017	Mark Murphy
<a href="#">View</a> <a href="#">Delete</a>	VNPS Early Bird Registration Reminder	07/07/2017	Bob Yacovissi
<a href="#">View</a> <a href="#">Delete</a>	VNPS Annual Meeting Registration, 2017	06/08/2017	Bob Yacovissi
<a href="#">View</a> <a href="#">Delete</a>	BY Login Test	05/09/2017	Bob Yacovissi

On the next screen, choose **Standard – Customize content framed by a saved email template**. This means 'Use a template that has already been established to create my new email'.

 Campaign Email

Standard – Customize content framed by a saved email template.


V2- Choose from a template library with predefined layouts and styles.

Select template:  [Next](#) [Cancel](#) [Build / Upload a new email template](#)

Preview:

If you're having trouble viewing this email, you may [see it online](#).

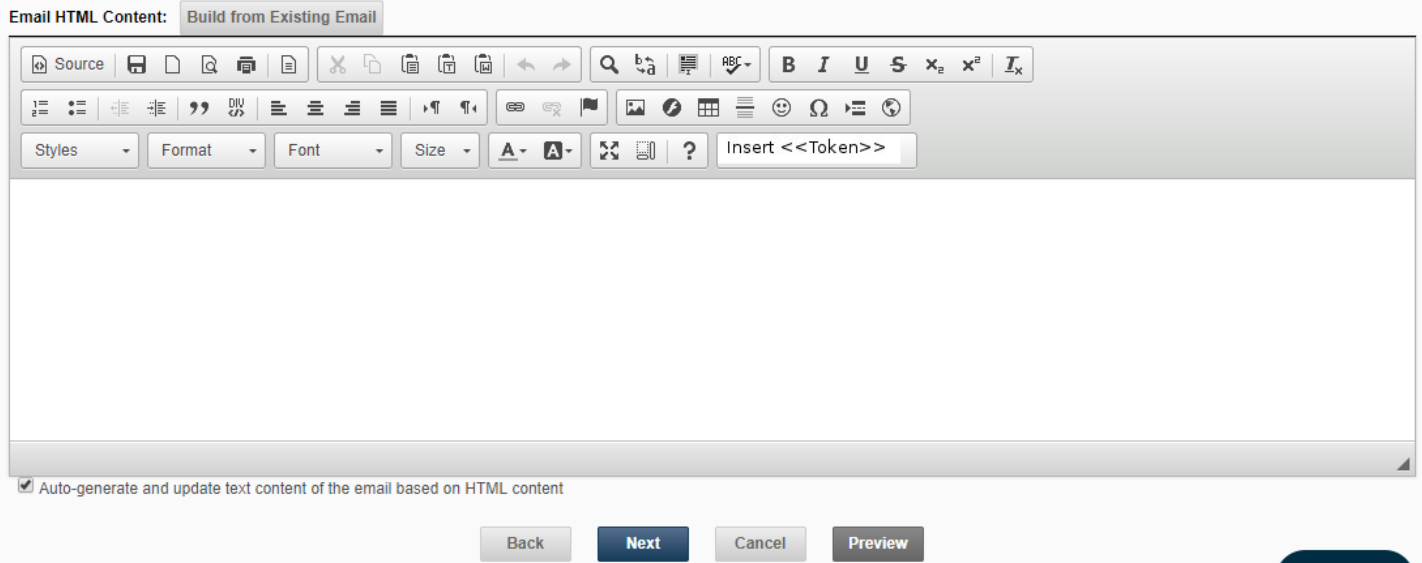
[Tell Friend](#)



Choose Select template: **Default**. If a template already exists for your chapter, choose that one.

Click **Next**.

On the next page, you'll see a standard word-processing display. Don't worry about a header, logo, footer, etc., as *that will be included on the email template that you've selected*. Just enter and format the text you'd like to send to your audience in the space provided.



You can either write your text here in Neon, or copy and paste it from another source (e.g., in Word).

**IMPORTANT!** If you copy and paste content from another source, be sure to bring it over 'clean', with no formatting. So, be sure to copy in the content in Plain Text.

To copy in Plain Text, look for the options at the top center of the formatting bar:



The center option that looks like a clipboard with a 'T' on it allows you to 'Paste as Plain Text'. Choose this, then do your pasting, and the content will be clean and ready for formatting.

## Formatting Your Content

Now that your content has been pasted in, you can use the options in the bar at the top to format it as you'd like.

Once your formatting is complete, choose **Next** at the bottom of the screen.

The next screen ensures you have an 'Unsubscribe' link on the email page.

### What is this?

In email campaigns, the recipient must be allowed to tell you if they don't want to receive any more emails from you.

So every email must have an option to 'Unsubscribe'.

**Email Text Content:**

To ensure that your email can be read by text-only email clients, a text-only version will be sent along with the HTML version. It is best practice to send quality content in the text-only version of your email because you cannot control which version your recipients will choose to receive.

Additionally, the <<Unsubscribe URL>> token must be present in the text-only version of your email. Even if you intend to send a blank text-only email you must include this token.

adfafd

<<Unsubscribe URL>>

Add Token

Back Next Cancel

By default, unless it's been removed, this option will be present. So, on this page you can just choose **Next** to move ahead.

On the next page, enter your email Subject name the Campaign something meaningful, like 'Blue Ridge Fall Meeting Email'. *The Campaign name is for YOU to identify it in the list, and isn't seen by the recipient.*

Enter the Sender's name, i.e. 'Jane Doe, Chapter President'.

Enter the Sender's email address. You can use [info@vnps.org](mailto:info@vnps.org) if you'd like (recommended).

**Do not use your personal email. The Sender's email address must end with "@vnps.org" to ensure the email is not marked as spam.**

1 Enter email subject \*:

2 Enter email campaign name \*:

This is an internal name and will not be displayed in your email.

3 Enter email sender name (optional): (i.e. John Doe)

4 Enter sender email address \*:

info@vnps.org

Back Save Cancel

Choose **Save** to save your campaign. It's now created, and ready to send to the appropriate audience.


Save will not send your campaign! That's done in the next step.

You can send your email at any time, so if you'd like to pre-stage campaigns to send out in the future, Neon allows you to do that. Just choose a future date and time and the email will go out on schedule.

## TEST YOUR CAMPAIGN

After you choose Save, you can do a test of the campaign. We strongly recommend testing it to be sure all links work, that the formatting is as you'd like it, etc.

Enter your own email, and that of anyone else you'd like to receive test/preview, and click 'Test' to send it to those email addresses. This does not send it to your full audience, only to those emails you've entered for testing.

 Campaign Email : SAMPLE FOR DOCUMENTATION

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To make sure the email is created or uploaded correctly, you may send a test email to yourself.

Enter email address:  [Test](#)

When the email is ready, publish the email by clicking the Ready to Send button.

[Edit](#) [Save Draft](#) [Ready to Send](#)


Find an error in the Test email ? Go back to the Campaign and make changes by selecting 'Edit' on this page.

When your tests look good, and your email is ready to go, choose **Ready to Send** to send right away, or schedule the email.

Want to save the email to work on it some more later? Just choose **Save Draft**. This will save your Campaign under ' Communications > Email Campaigns'. It will appear at the top of the list under Email Drafts.

## SENDING YOUR CAMPAIGN

After you choose 'Ready to Send', you'll see the next screen asking you to choose your Audience and to schedule the email. Choose **Setup Email Schedule**.

 Your information has been successfully submitted.  
**To select email audience and set up broadcast date, please click the button to proceed.** [Setup Email Schedule](#)

You will see a complete list of all the pre-established email lists. Choose the appropriate one, then click 'Continue'.

Communications / Send Campaign Emails / Select Email

1. Select email > 2. Select audience > 3. Schedule > 4. Review & Send > 5. Result

### Select Audience

[Continue](#) [Back](#)

Select	Audience Name	Status	Active	Bounce	Error	Unsubscribe	Updated on	Updated By
<input type="radio"/>	VNPS Members	Available	1359	0	0	1	08/22/2017	Bob Yacovissi
<input type="radio"/>	Template for Email Audiences	Available	0	0	0	0	08/22/2017	Liesl Lukacs
<input type="radio"/>	South Hampton Roads	Available	64	3	0	0	08/15/2017	Bob Yacovissi
<input type="radio"/>	Upper James River	Available	37	0	0	0	08/15/2017	Liesl Lukacs
<input type="radio"/>	Prince William Wildflower Society	Available	138	0	0	0	08/15/2017	Liesl Lukacs
<input type="radio"/>	Potowmack	Available	403	0	0	0	08/15/2017	Liesl Lukacs
<input type="radio"/>	Pocahontas	Available	112	0	0	0	08/15/2017	Liesl Lukacs
<input type="radio"/>	Piedmont	Available	147	0	0	0	08/15/2017	Liesl Lukacs
<input type="radio"/>	Northern Neck	Available	112	0	0	0	08/15/2017	Liesl Lukacs
<input type="radio"/>	New River	Available	49	0	0	0	08/15/2017	Liesl Lukacs
<input type="radio"/>	John Clayton	Available	108	0	0	0	08/15/2017	Liesl Lukacs
<input type="radio"/>	Jefferson	Available	192	0	0	0	08/15/2017	Liesl Lukacs
<input type="radio"/>	Blue Ridge Wildflower Society	Available	108	0	0	0	08/15/2017	Liesl Lukacs
<input type="radio"/>	VNPS Email Addresses	Available	1479	64	0	0	07/06/2017	Bob Yacovissi
<input type="radio"/>	BY Login Test	Available	8	0	0	0	05/08/2017	Bob Yacovissi

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Next, either choose **Send Immediately**, or schedule the appropriate time for your email to be sent.

Click **Continue**.

Communications / Send Campaign Emails / Select Email

1. Select email > 2. Select audience > 3. Schedule > 4. Review & Send > 5. Result

### Schedule Email

Send immediately

Send on:

Your emails will be sent at 5:00AM Central Time on the selected date.

[Continue](#) [Back](#)

Take one last look at the details. If they are right, you are ready to send.

**Ready to send or schedule?**

Click **Send**.

Your email will go out to your audience immediately (with a bit of delay to process the send), or will be queued up to send on the date that you selected.

Communications / Send Campaign Emails / Select Email

1. Select email > 2. Select audience > 3. Schedule > 4. Review & Send > 5. Result

### Review & Send

Email	SAMPLE FOR DOCUMENTATION	<a href="#">Change</a>   <a href="#">Preview</a>   <a href="#">Send Test Email</a>
Audience	BY Login Test	<a href="#">Change</a>
Schedule	08/24/2017	<a href="#">Change</a>

[Send](#) [Back](#)

**You are finished!**