

## How to Create and Send an eNewsletter

**Market:** House, Senate

**Module:** Outreach

**Purpose:** This guide provides instruction on how to select the template, create the content, select the audience, review the information, and process the publication of an eNewsletter using the IQ eNewsletter Wizard.

### Key Benefits

IQ provides a selection of standard or customizable templates to create an eNewsletter. In addition, it offers an eNewsletter Wizard to guide the process from building to publishing the eNewsletter. As a result, users can reuse templates to save time and also to confirm that all the necessary steps have been completed to properly build the eNewsletter.

Contact your Office IQ Consultant to discuss the configuration of your office's eNewsletter templates.

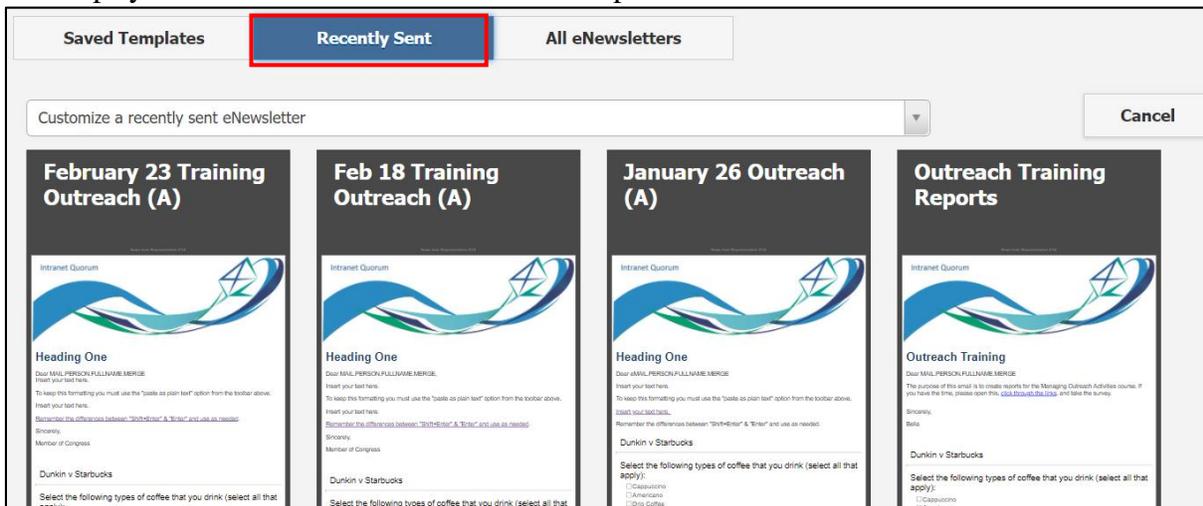
### Selecting the Template

1. Navigate to **Outreach > New > eNewsletter**.



**Note:** In IQ, an eNewsletter uses the same process as creating a Press Release.

2. Select a template from the available options. A best practice is to select from the **Recently Sent** tab as that displays those that have been finalized and published.

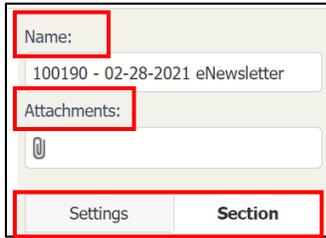


### Adding the Content

3. The template is displayed along with the **eNewsletter Wizard**, which is automatically set to **Content**.



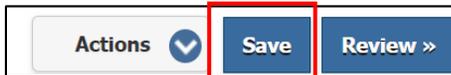
4. On the left page, change the title, attach documents as needed, and modify the settings and sections of the eNewsletter...



5. Modify the content using the menu. Hover the cursor over an icon to identify their function, as needed.



6. Select **Save**.



## Selecting the Audience

7. Click **Select Audience**.



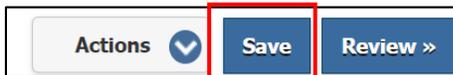
8. Complete the fields by selecting values for each field. To determine the size of the audience build by the selection, click **Review Audience Size**.

The screenshot shows the 'Select Your Audience' form. It includes fields for Name, Start with, Salutation, and Audience Selection. The 'Review Audience Size' button is highlighted with a red rectangular box. The form also features sections for including and excluding contacts based on various attributes.

**Note:** The **Audience Builder** feature in the **Contacts** module can also be used to create a list of contacts used as an audience for correspondences, eNewsletters, surveys, etc. Thus, this list can be accessed and used in the eNewsletter from the **Start With** field.

Refer to the **How to Use the Audience Builder** Quick Reference Guide for instructions on using this feature.

9. Select **Save**.



## Reviewing the Information

### 10. Click **Review**.



### 11. Complete the fields. Additional information on the highlighted fields are provided below.

**Review & Schedule** 🔗

Name:

Postal Address:

From:

Subject:

Attachments:

Start:  Date:  Time:

**Build Only** (highlighted in red box)

Build and Send

Build and Send Immediately

Bill Information:

Bill Position:

**Show Click-throughs** (highlighted in red box)

Link Name	URL	Affiliation
COVID Relief Information	https://www.cdc.gov/coronavirus/2019-nCoV/index.html	INFECTED - Had... ✕

#### Start

- **Build Only:** IQ will generate the eNewsletter only.
- **Build and Send:** IQ will generate the eNewsletter and will send it to the target audience based on the specified date and time.
- **Build and Send Immediately:** IQ will generate the eNewsletter and immediately send it to the target audience.

#### Show Click-throughs

This section displays all hyperlinks that are included in the eNewsletter. IQ enables ability to associate or “hyper-tag” an affiliation code to an existing constituent’s record who click on the link. Refer to the *How to use Hyper Tagging in IQ* Quick Reference Guide on how to use this feature.

### 12. Click the button that is displayed. The type of selection will vary based on the type of build.



Select **Build**, which is the display if **Build Only** is selected above.



Select **Send**, which is the display if **Build and Send** is selected above.



Select **Send Now**, which is the display if **Build and Send Immediately** is selected in the previous step.