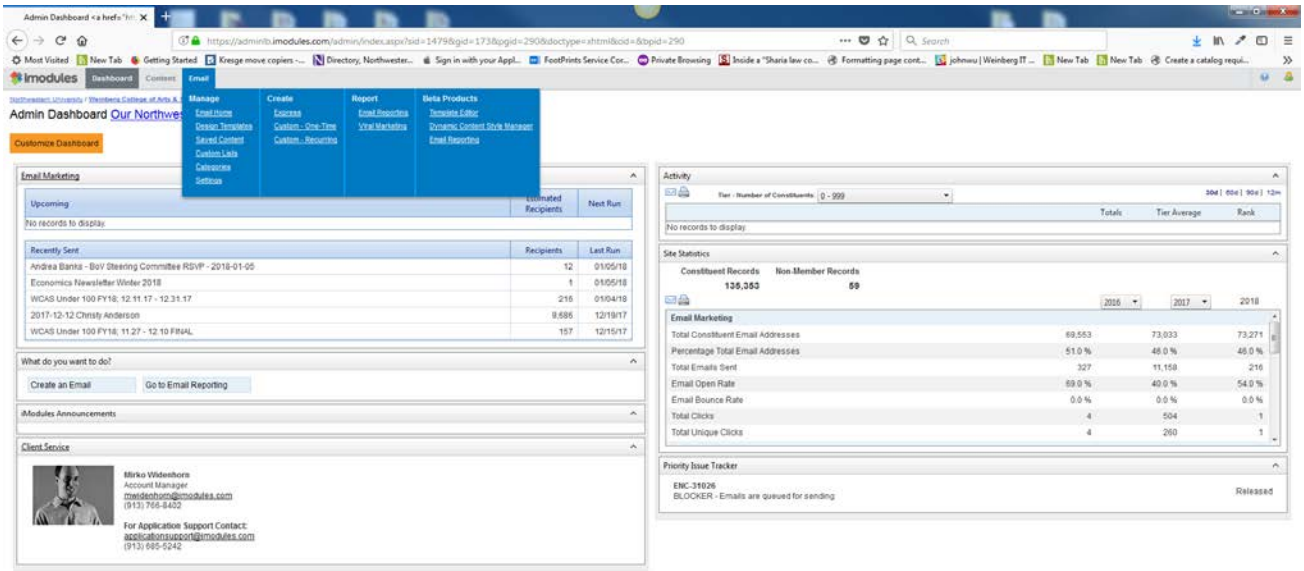
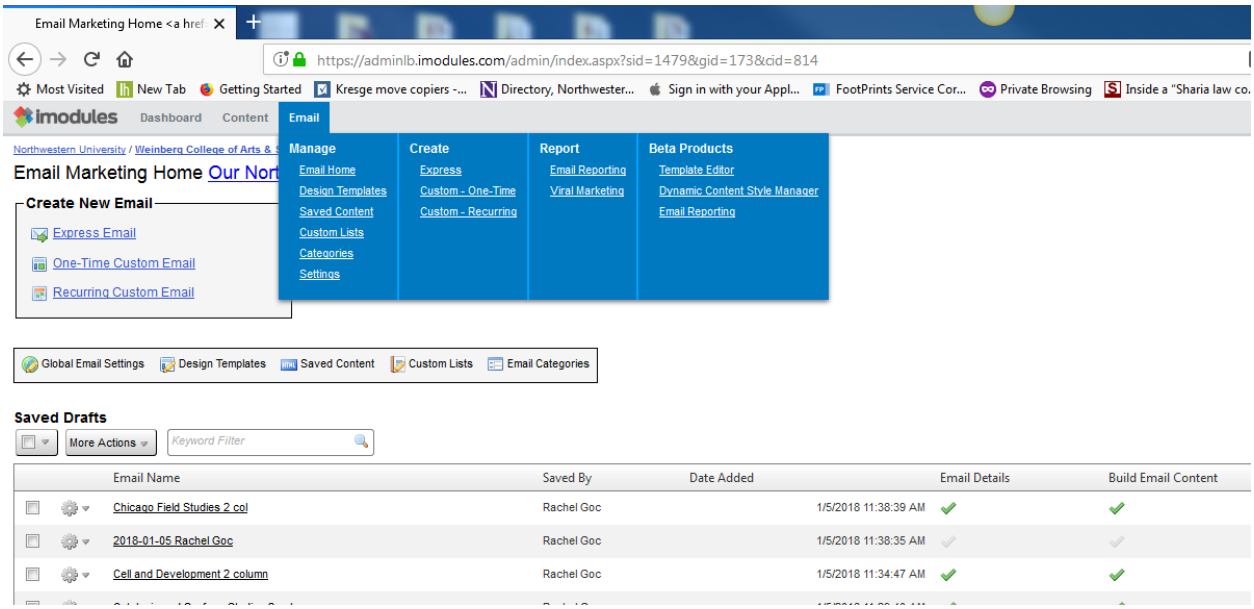
iModules Step-by-step Guide

Navigating the Dashboard and Email Menu

1. After signing into iModules, you will see the main dashboard. To navigate to the email section, go to the top toolbar and click on **Email**. Generally, you will want to select Email Home from the dropdown. However, if you know you want a specific template or previous email, you can make other selections from the dropdown.

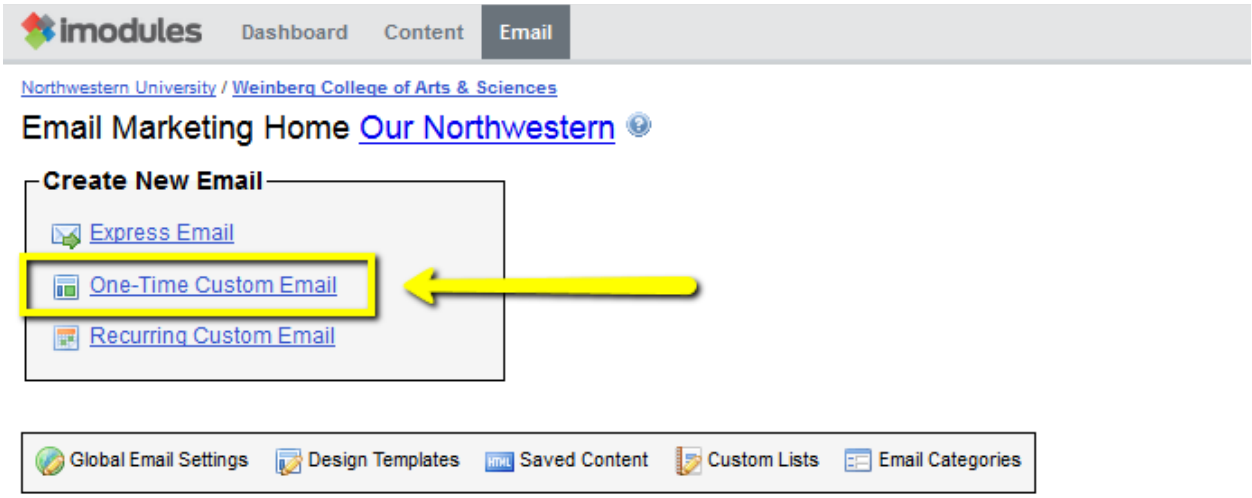


2. In the Email area, you can navigate to a template by clicking on **Design Templates** from the dropdown menu or by clicking on **Design Templates** text and icon in the middle menu.

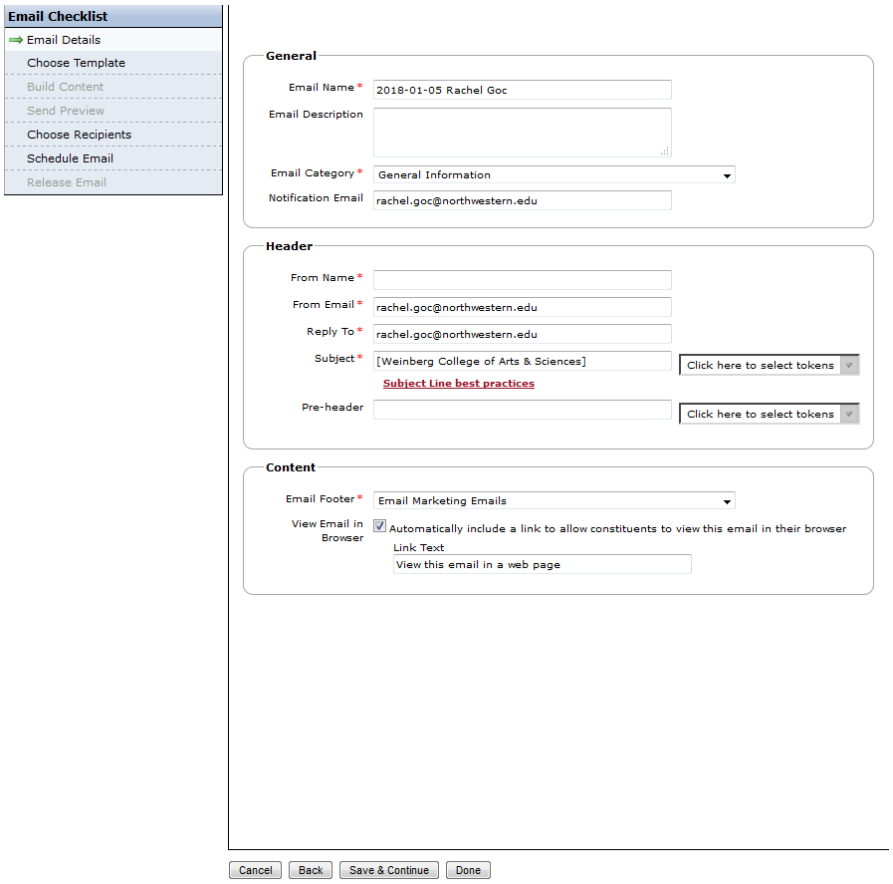


Create a New Email

1. To create a new email click on **One-Time Custom Email**.

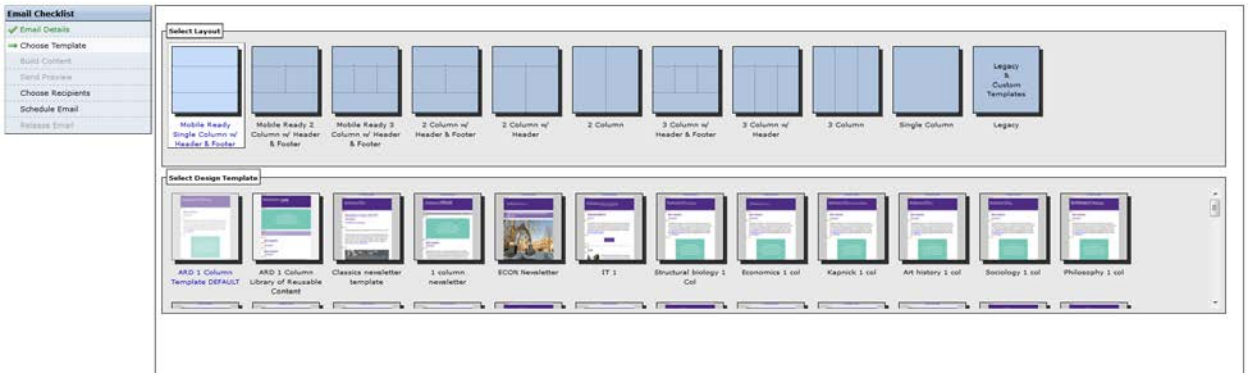


2. Fill out the Email Details for your email.



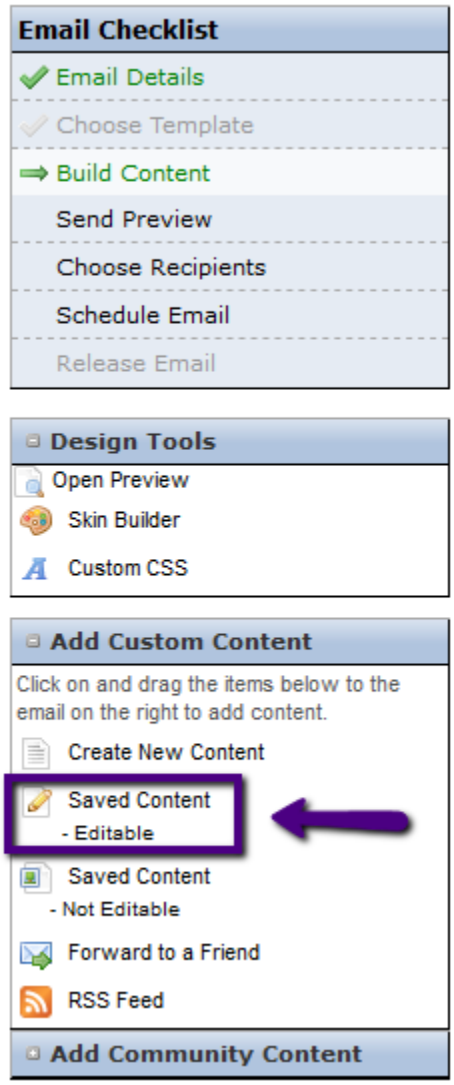
Email Name: This should describe the email for your reference and will not be seen by email recipients.
Email Category: Select your department/program/group.
From Name: This from name will display to your recipients. We recommend sending from a particular person, for example the Departmental Chair. Email research shows that people are more likely to open an email that is coming from a person than a general department.
From Email: The email address that the email will come from.
Reply To: The email address that any responses should be directed to.
Subject: There is some text pre-loaded into the subject line. You can delete that text and write a new subject.
Email Footer: Select your department/program/group from the dropdown menu. This footer includes a physical address, as is required by law for email marketing.

3. After completing the required fields, click **Save and Continue**.
4. Choose your template by selecting from the categories **Mobile Ready Single Column w/ Header & Footer** or **Mobile Ready 2 Column w/ Header & Footer**. Do not use the templates that do not start with "Mobile Ready," as they will not render well on mobile devices.
    a. Click on either the 1 or 2 column categories. The pre-loaded templates will populate from the library. Choose from this list by clicking on the template.

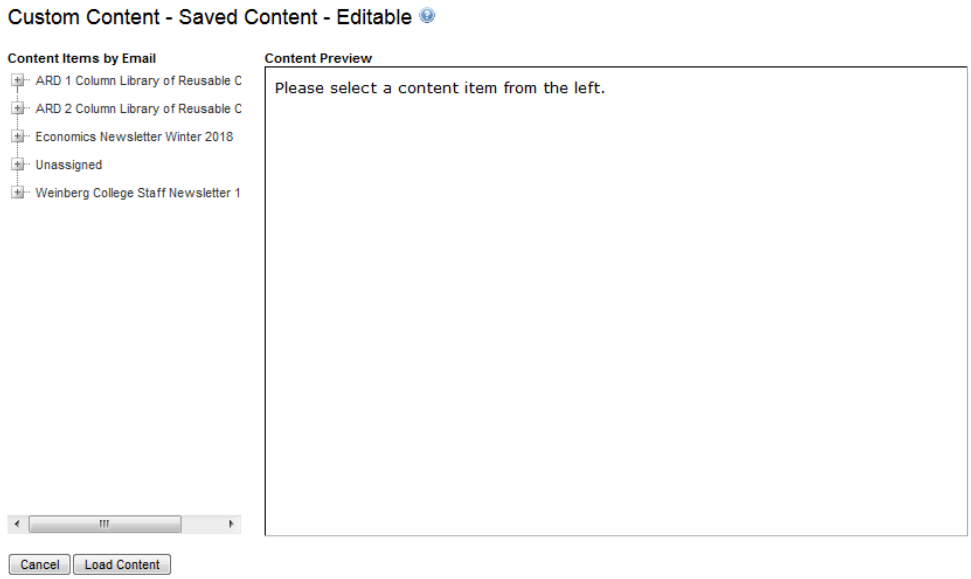

Email Checklist
Email Details
Choose Template
Build Content
Send Preview
Choose Recipients
Schedule Email
Release Email
Select Layout
Mobile Ready Single Column w/ Header & Footer
Mobile Ready 2 Column w/ Header & Footer
Mobile Ready 3 Column w/ Header & Footer
2 Column w/ Header & Footer
2 Column w/ Header
2 Column
3 Column w/ Header & Footer
3 Column w/ Header
3 Column
Single Column
Legacy & Custom Templates
Legacy
Select Design Template
ARD 1 Column Template DEFAULT
ARD 1 Column Library of Reusable Content
Classics newsletter template
1 column newsletter
ECON Newsletter
IT 1
Structural biology 1 Col
Economics 1 col
Kapnick 1 col
Art history 1 col
Sociology 1 col
Philosophy 1 col

Add Content Blocks

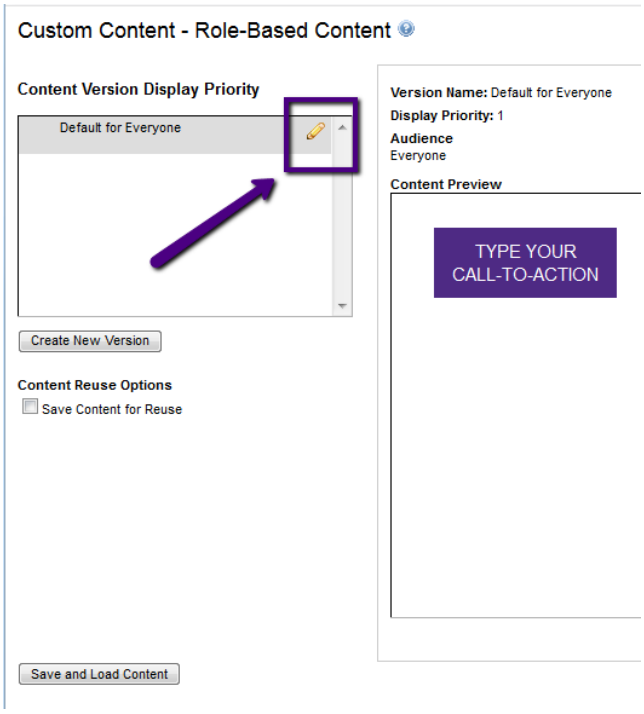
1. Add new blocks of content by pulling in saved blocks from the content library. Click on Saved Content-Editable in the left toolbar and drag over to where you'd like to add new content.



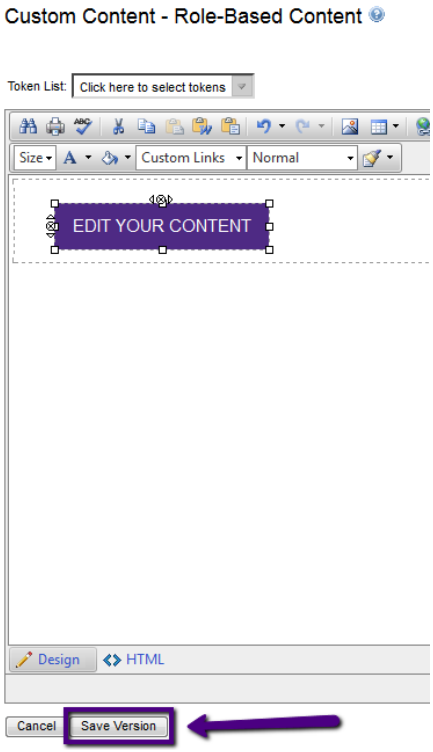
2. Use the ARD 1 Column or 2 Column library depending on which template you're using. Open the column libraries by clicking on the plus sign next to the folder name.



3. Click on the content block you'd like to add and preview the block in the Content Preview window.
4. Click **Load Content** to insert the block into your email.
5. If you click **Save and Load Content,** the block will be loaded into the email with the default content. To edit the content, click on the pencil icon to open the content editor.

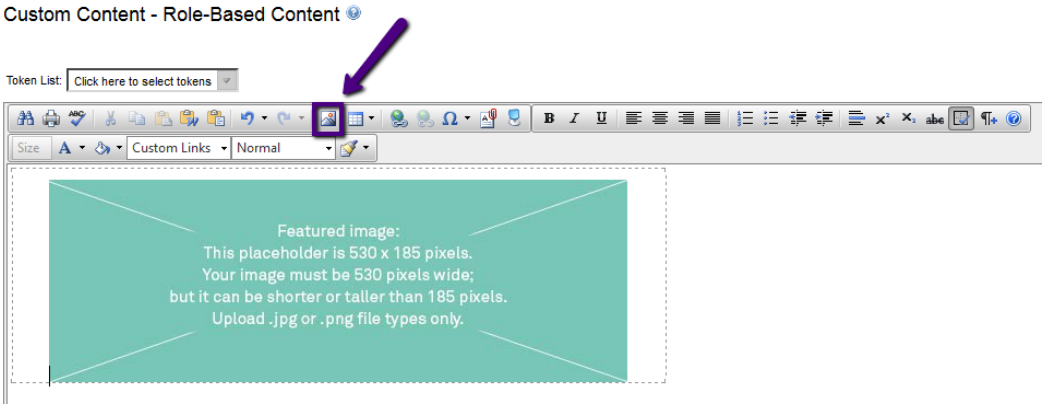


6. After editing your content, click **Save Version**. In the following window, click **Save and Load Content.**

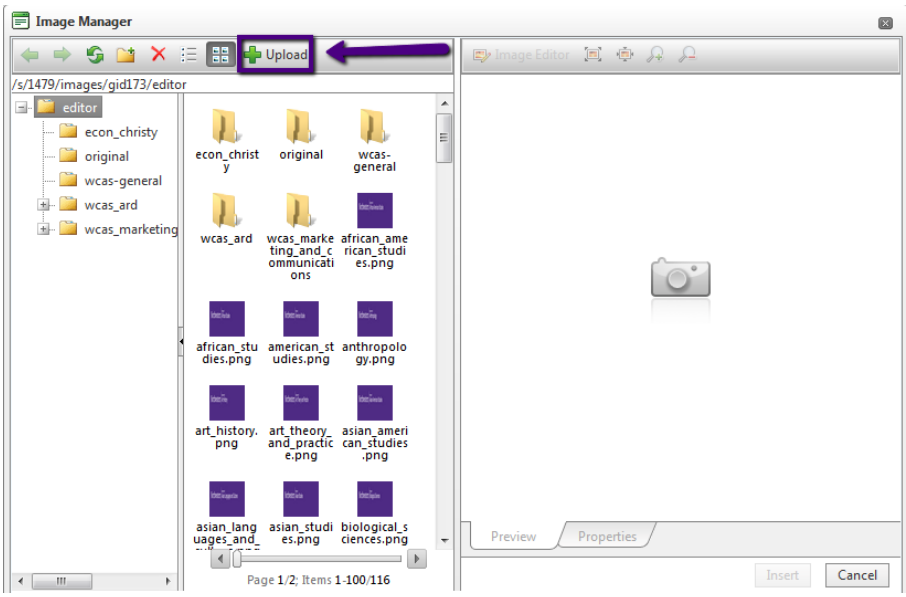


Upload and Insert an Image

1. In the block content editor, use the Image Manager to upload images. Click on the Image Manager Icon in the WYSIWYG toolbar.

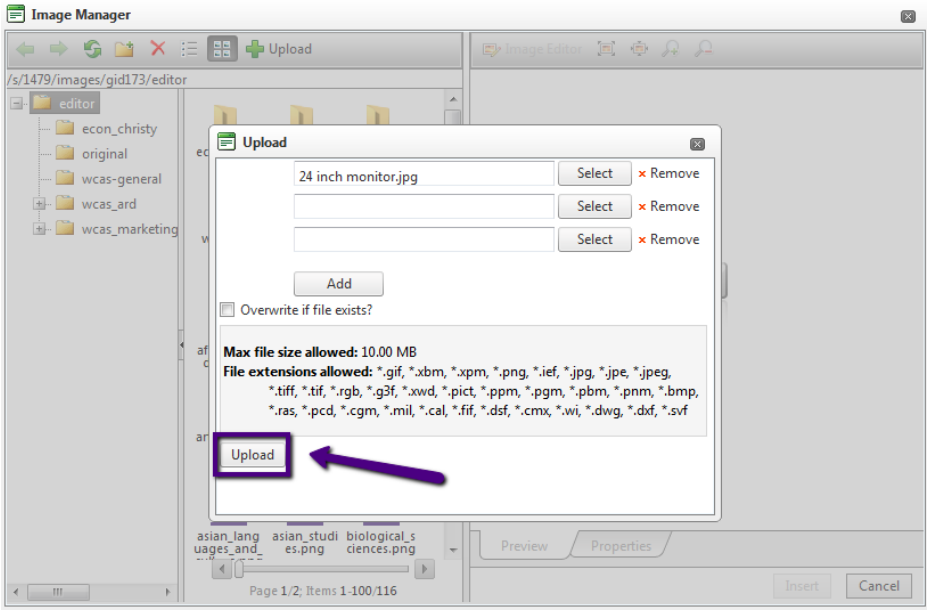


2. You may see a pop-up window that says that you are trying to navigate to a non-existing folder. Please ignore this message and click on OK.
3. Click on the folder where you'd like to upload an image. It is best for you to upload your images to the WCAS-GENERAL folder, which is in the EDITOR folder. Click on WCAS-GENERAL to enter the folder.
4. Click on the green plus to open the upload window.

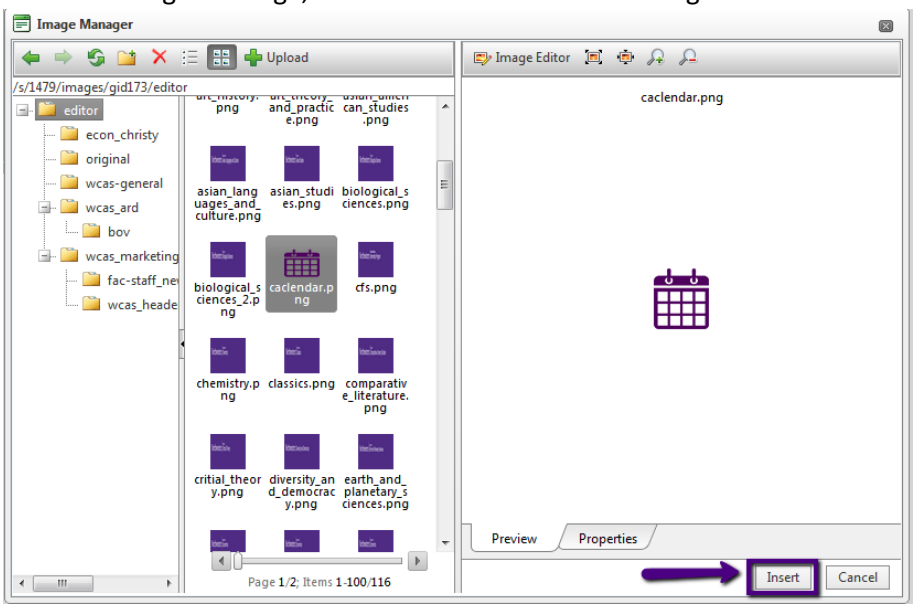


5. Click on Select to browse your computer for images. If you want to upload several images at once you can add upload lines by clicking on the **Add** button.

6. Once you've selected the images you want to upload, click **Upload.**



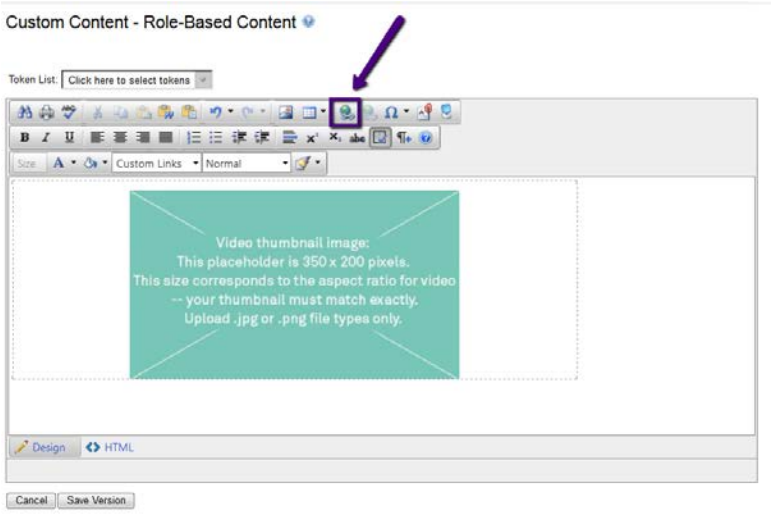
7. To insert an image once uploaded, click on the image in the folder. It should appear in the Image Editor window on the right hand side. It is not recommended to edit your photo in iModules. Photo resizing or editing should be done in an external program like Canva or Photoshop before uploading into iModules.
8. After selecting the image, click on **Insert** to insert the image into content editor.



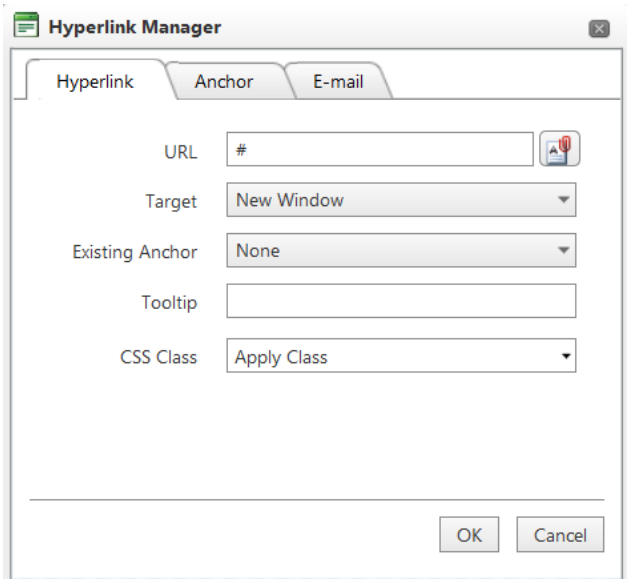
9. Click **Save Version**.
10. Finish by clicking **Save and Load Content**.

Upload and Insert a Video

1. This process is similar to uploading an image. Select **Saved Content-Editable** from the left-hand Add Custom Content menu and drag it to where you'd like to place the video.
2. From the ARD reusable content libraries, select **Image_Video Placeholder** and click **Load Content.**
3. To insert this block in draft form, click **Save and Load Content.** To edit the block, click on the pencil icon.
4. Insert a still image from the video as a placeholder. Reference the section on how to upload an image if needed.
5. To insert a link to the video, select the link icon in the WYSIWIG toolbar.



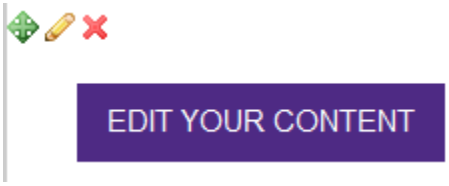
6. Place your hyperlink in the URL field and click **OK.**



7. Click **Save Version**.
8. Finish by clicking **Save and Load Content**.

Manipulating Blocks

1. To move a block click on the **green arrow** and drag the block to the new position.
2. To delete a block click on the **red X**.
3. To edit a block click on the **pencil icon**.



Send a Preview

1. After editing your content, click on **Save & Continue** in the bottom of the screen or select **Send Preview** from the upper left hand workflow.
2. In the Send Preview window, add recipients to your test preview by typing the email address of the recipient and then clicking **Add**.
3. If you would like to save the email you've created as a template for future use, click the box next to **Create a Design Template based on this email.** Give the template a unique name and it will be saved in the Design templates gallery.

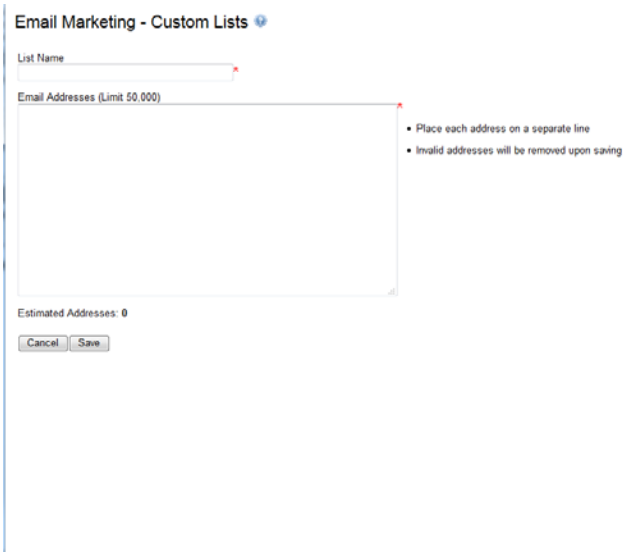
Test Sending

We recommend sending your email to several different email clients, especially Outlook and Gmail. It's also a good idea to look at your email on different devices, especially a mobile device like a phone or tablet.

Choose Recipients

1. Add a one-time Excel or CSV file of recipient emails by using the **Email Address File** to upload.
2. Created a list you can use again by selecting Custom Lists by clicking on **Configure**.
3. Select **Create New List.**

4. Name your list and paste in the email addresses.
5. Click Save.



Schedule Email and Release Email

1. Select Immediately or In the Future to send your email. If you select In the Future, you can choose the date and time you'd like to send.
2. When you are ready to send or schedule your email, click **Save & Continue** or **Done** in the Release Email window.