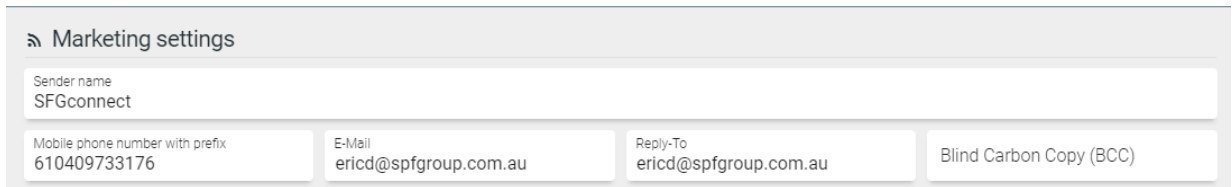



Spring 2020 Marketing Email Template

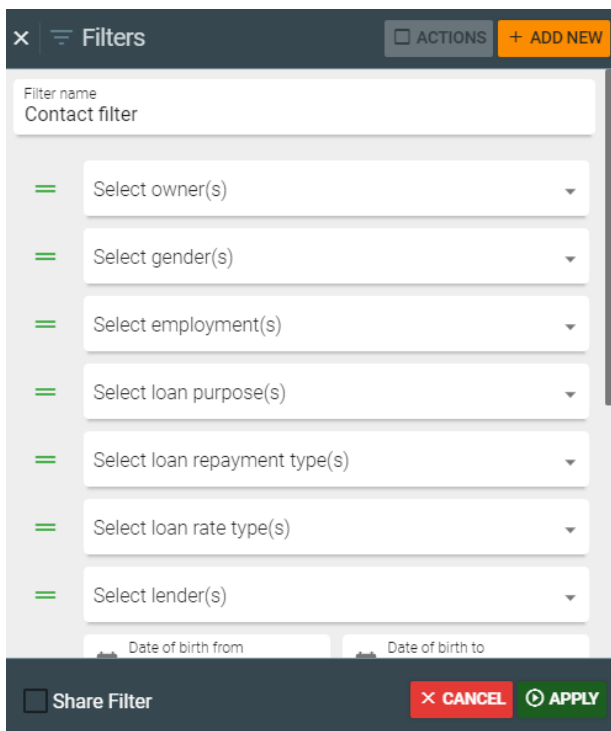
Setting up the Email Marketing Template

1. To set up your marketing settings, go to [Settings > Marketing](#). Ensure your mobile number includes a prefix and remove the email in the 'Blind Carbon Copy (BCC)' field.



The screenshot shows the 'Marketing settings' form. It includes a 'Sender name' field with the value 'SFGconnect'. Below this are four input fields: 'Mobile phone number with prefix' (610409733176), 'E-Mail' (ericd@spfgroup.com.au), 'Reply-To' (ericd@spfgroup.com.au), and 'Blind Carbon Copy (BCC)'.

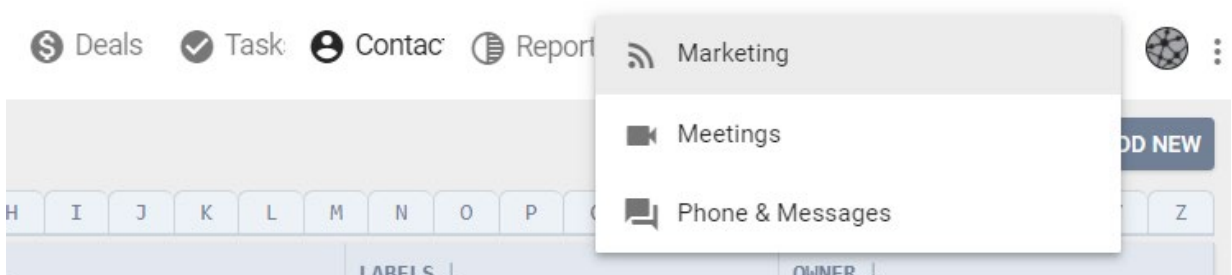
2. Click on 'Contacts' in the top navigation bar.
3. Next, click on the  button to create a contacts filter. You must create a filter to select which contacts you would like to send this marketing email to.




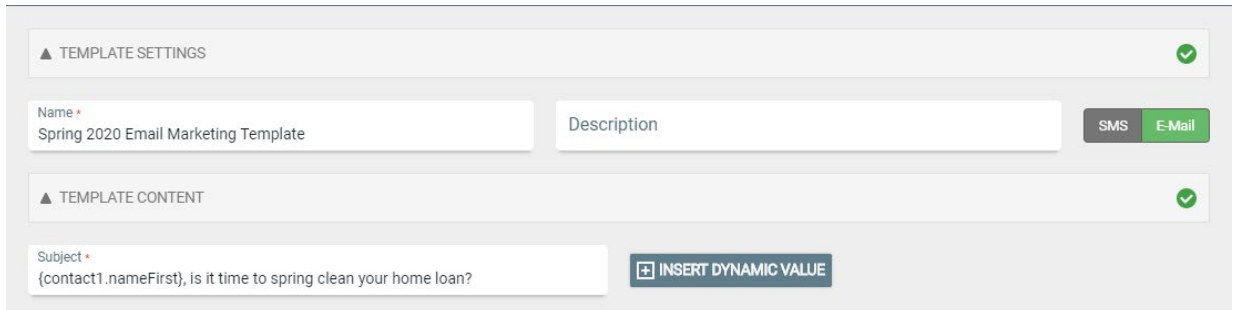
The screenshot shows the 'Filters' dialog box. The 'Filter name' is 'Contact filter'. There are several dropdown menus for filtering: 'Select owner(s)', 'Select gender(s)', 'Select employment(s)', 'Select loan purpose(s)', 'Select loan repayment type(s)', 'Select loan rate type(s)', and 'Select lender(s)'. At the bottom, there are 'Date of birth from' and 'Date of birth to' fields. The dialog has a 'Share Filter' checkbox, a 'CANCEL' button, and an 'APPLY' button.


Note: For further information on filtering contacts, please review the [knowledge base article](#).

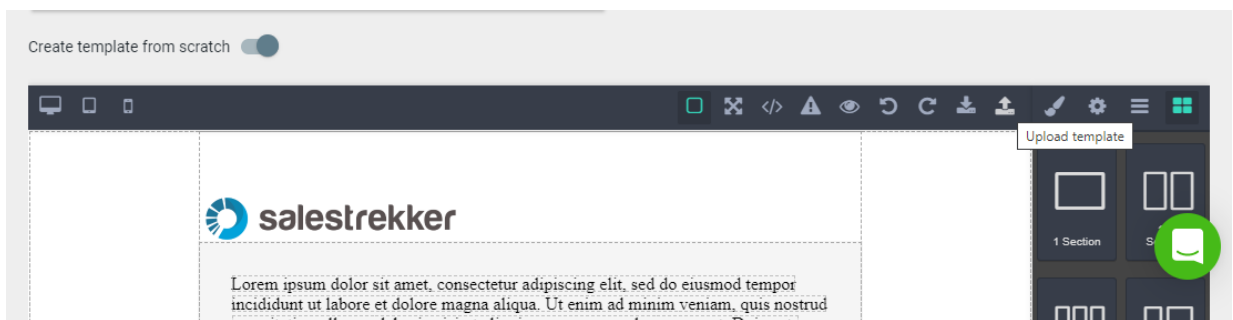
4. Click on 'Connect' in the top navigation bar and then select '[Marketing](#)' from the dropdown menu.



5. Click on the 'Templates' tab.
6. Next, click on the  button to view the 'Template Settings' and 'Template Content'. Complete the mandatory sections as per below:
 - a. **Name:** Spring 2020 Email Marketing Template
 - b. **Subject:** {contact1.nameFirst}, is it time to spring clean your home loan?



7. Switch the toggle for 'Create Template from Scratch' on. Click on the  button to upload the provided [HTML email template](#).




Note: For further information on how to build or edit a HTML template, please review the [knowledge base article](#).

8. Click on the  button once finished.

Sending the Email Marketing Campaign

9. To send the email marketing campaign, click on the 'Campaigns' tab.

Note: For further information on the advanced marketing feature, please review the [knowledge base article](#).
10. Next, click on the  button and complete the mandatory sections as per below:
 - a. **Name:** Spring 2020 Email Marketing Template
 - b. **Sender:** Select the 'Organisation' or 'Contact Owner' from the dropdown menu
 - c. **Template:** Select the previously created 'Spring 2020 Email Marketing Template' from the dropdown menu
 - d. **Contact Filter:** Select the previously created contact filter

- Next, enter your email in the 'E-Mail for Preview' field and then click on the **SEND PREVIEW** button to see how the email campaign will look like and also if anything needs correcting.

Note: We recommend you send a preview email to yourself first before sending out to your contacts. This way you can ensure everything is appearing as it should.

- If all is ready, press the **SEND CAMPAIGN** button.

Note: You can market/advertise directly to your clients, provided that you have obtained consent to do so, and the [Australian Privacy Principles](#) are met.

Need Help? Use our LIVE chat feature

If you need assistance using Chief and want your question answered quickly please use our live chat feature built into your Chief account. This help desk feature is open Monday to Friday from 7am to 11pm AEST and Saturday from 8am to 3pm AEST. Please click on the green circle button in the bottom right hand corner of your Chief screen to get started.
