

Tap into something you already have. Get new clients through your existing network

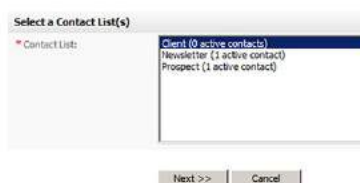
To add new clients to your client area follow these simple steps...

1. Login to emailMARKETER at [www.websmithsemailmarketer.com](http://www.websmithsemailmarketer.com) using the username and password provided to you by email.



2. Go to **CONTACTS > ADD A CONTACT**.

3. Choose the Client list and click **NEXT**.



4. Enter the details of the client.

Please ensure you use these values in the following fields:

- **AccId** should be **YOUR-ID (username)**.
- **AccLv** should be **2** for clients (**1** is for prospects).
- **Password** **MUST** be set as **accountant** when the subscriber is added via emailMARKETER. The client will be able to change this upon logging in, or you can do it for them by logging in and then choosing to **CHANGE THE PASSWORD**.
- You should also ensure you have a **First Name** field to be able to personalise emails you send out to clients if you wish.



## Additional information

If you wish to import a list of all your clients at once, follow the [how to import your contact list tutorial](#). Make sure you have the required values for all the fields before trying to import a clients list.

Click **SAVE AND EXIT**

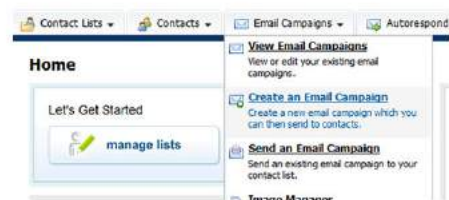


The current issue of the newsletter is usually ready a few days before the end of the preceding month.

Please follow the simple steps below to create an email campaign containing your monthly e-newsletter.

## How to create your email campaign

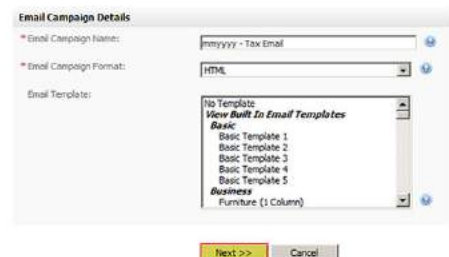
1. Log into [www.websmithsemailmarketer.com](http://www.websmithsemailmarketer.com) using the username and password provided by email.
2. Go to **EMAIL CAMPAIGNS > CREATE AN EMAIL CAMPAIGN**.



3. In **EMAIL CAMPAIGN NAME** enter something relevant like *Apr2021 - Tax Email*. This is for your own reference, no-one else sees this.

In **EMAIL CAMPAIGN FORMAT** select either *HTML and Text* or if you only ever want to send it as an **HTML** email, select **HTML** - this makes the process easier!

Select *no template* from **EMAIL TEMPLATE** and click **NEXT >>**

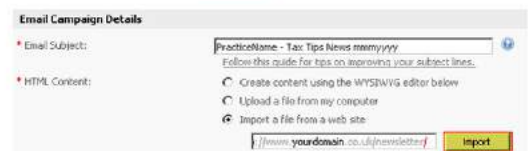


4. In **EMAIL SUBJECT** enter the subject of the email as seen by the recipient, something like *Tax Tips and News - April 2021*, or maybe your practice name.

*Making this familiar for the recipient and interesting will result in a higher open rate*

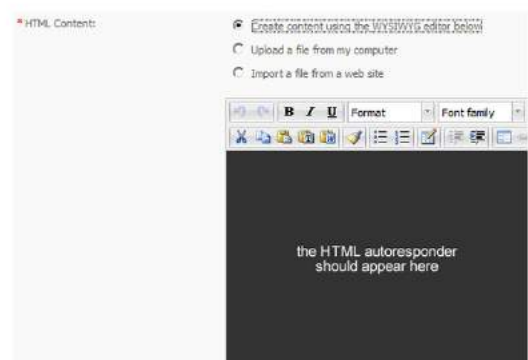
For the **HTML CONTENT**, choose something like **IMPORT A FILE FROM A WEBSITE**, then type <http://www.yourdomain.co.uk/newsletter/> and click **IMPORT**.

*Make sure you have the closing / at the end.*



5. You can then edit any of the text you wish to in the screen on the right.

*If you want the "Need Help", "New Clients Welcome" or "About Us" sections permanently edited, simply send us an email with the new text.*



6. We highly recommend sending yourself a preview by typing your own email address in the **TO** field and pressing the **SEND PREVIEW** button. Once you have made sure everything looks ok, you can click **SAVE AND EXIT** at the bottom of the screen.



**⚠ You should only import subscribers who have explicitly agreed to receive emails from you.**

Using emailMARKETER to send **unsolicited emails that are reported as spam will result in the deletion of your account** from the system as it may cause our email server being blacklisted, affecting every user.

## Stage 1 - Get all contacts into a file ready to import

You will probably want to separate any existing email lists you have between prospects and clients and **for our website clients, these lists are already setup.**  
If the contacts are all presently in a distribution list within Outlook a simple way to get them is...

1. Open the distribution list and choose **FILE > SAVE AS** and save the list as a text only file type.
2. Then open the text file and copy and paste all the field details into Excel.
3. Put some headings in a row at the top of the columns - email, first name, last name, etc. The first name is very useful as it enables you to personalise emails sent out.
4. You need to add three additional columns with the titles *AccId*, *AccLvl* and *Password*. All of the entries need to have YOUR-ID (username) inserted in the *AccId* column.

Prospects need to have an *AccLvl* of **1**; Clients an *AccLvl* of **2**. This is what grants them the appropriate access rights within your website.

The password must be set to **accountant** for everyone (regardless of whether they are a prospect or client) - they will be able to change this the first time they log in.

5. Then save with **FILE > SAVE AS** and save the file as a **CSV (COMMA DELIMITED) (\*.CSV)** file type. Click **OK** and **YES** to the prompts that may come up. If you have fields not already setup in emailMARKETER you will need to create custom fields for them before they can be imported.

**⚠ If you have any active autoresponders, please disable them before importing contacts**

**📌 If you get really stuck doing this please send us your list and we will import it for you!**

## Stage 2 - Import the file into emailMARKETER This assumes you are importing your **prospect** email list.

1. Log into [www.websmithsemailmarketer.com](http://www.websmithsemailmarketer.com) using the username and password provided.

2. Go to **CONTACTS > IMPORT CONTACTS FROM A FILE**.

3. Select your list (**Prospect** in this case) and click **NEXT**.

4. For the **IMPORT DETAILS** leave all the default settings of **Confirmed**, **HTML**, **OVERWRITE EXISTING DETAILS** and **AUTORESPONDERS** **unticked**.

5. For the **FILE DETAILS**, tick the **FILE CONTAINS HEADERS**, leave the **FIELD SEPARATOR**, leave **ENCLOSURE** empty and then browse to the file to be imported from your computer..

Click **NEXT**

6. Match up the fields being imported to those available. Click **NEXT**.

7. Click **START IMPORT** and all records should then import successfully.

### Import Contacts

Click the button below to start importing your contacts.

**Start Importing...**

**🟢 The contact import has been completed successfully**

- 1 contact was imported successfully
- 0 contacts were updated successfully
- 0 contacts contained duplicate email addresses
- 0 contacts are unsubscribed
- 0 contacts are suppressed from joining this contact list
- 0 contacts contained bad data
- 0 contacts were not imported successfully

### Additional information

**⚠ If importing clients, please follow the instructions in adding new clients to your client area.**

**📌 To Import subscribers to mailing lists, the list first needs to be created in emailMARKETER.**



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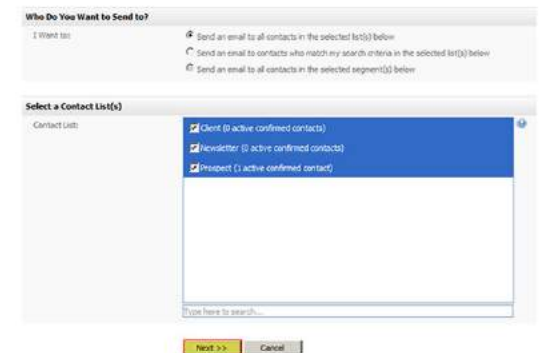
Please follow the simple steps below to send an email campaign containing your monthly e-newsletter.

## How to send your email campaign

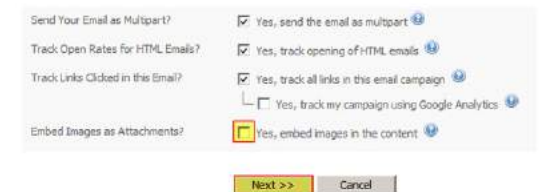
1. Go to **EMAIL CAMPAIGNS > VIEW EMAIL CAMPAIGNS**, then click the **SEND** link to the right of the campaign you want to send out.



2. Select lists you wish to send the email to and click **NEXT >>**



3. You can probably leave all options on the next page as they are, simply make sure that **YES, EMBED IMAGES IN THE CONTENT** is not ticked. Click **NEXT >>**



4. Review the campaign summary, and then click **YES, SEND THIS EMAIL CAMPAIGN**



## Additional information



*Why emails may not arrive? Most recipients will receive the email as intended, but it is possible that it does not reach every subscriber on the list. If this is the case, the most likely cause is that it was caught by their spam filter. All our emails are tested to pass spam filters verification - before we make them available to send out - but some spam filters are extra sensitive and may stop certain emails. This is because they are large HTML emails and also by their nature often talk about things like profit, income, property etc which are high on the list of spam-related subjects.*

*One way to increase email delivery is for the recipient to add your "from" email address to their safe-sender list. This needs to be done in their email software as well as in any anti-spam they have locally, on their email or ISP's server.*