


Unite Education Program v6.2

Job Aid: 5592

## Add an Email Record to Unite

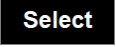

When you add an email record to Unite, you and others can select the record as a starting point when sending email communications. You can also publish the record for use in a customer journey. Unite provides analytics for all emails once they are sent.

### To add an email record

1. Open a browser and log on to Unite.
2. On the main menu, click JOURNEYS.
3. On the navigation pane, click **Marketing emails**.
4. Click  .

#### Note

If there is a similar email in Unite, you can open an email and use the **Save As** option to add a new email record with your updates.

5. If you want to start with a template, click the layout and then click  .  
Otherwise, click  .

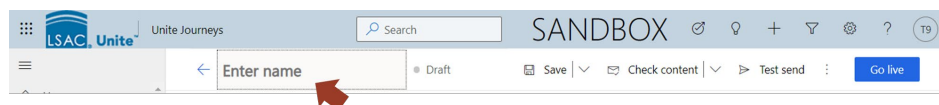
#### Note

You can start with a system template or a custom template added by a Unite user from your school.

6. Enter a unique name for the email record.

### Note

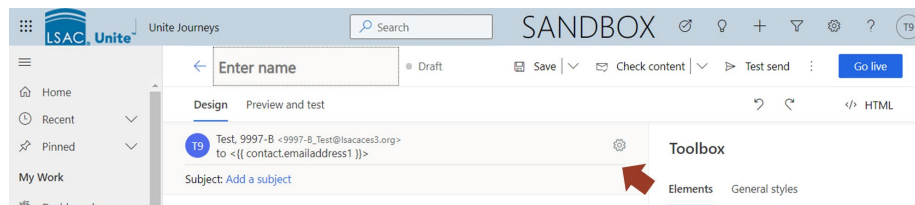
Unite assigns a default name to new email records. Click the default name to enter a name that helps identify the email in searches, on grids, and in customer journeys.



7. Verify you are on the *Design* tab.
8. Click the email header.

### Note

The email header includes the subject of the email message along with other general settings.



9. Specify email header settings.

### Note

Settings for the email header are organized into four sections, three of which you can collapse and expand as needed.

### Note

If you are running multiple instances of Unite, confirm the default **School Id** is correct for the email record you want to add.

10. Design the email message.

11. Perform email checks.

**Note**

You can check for errors, check for accessibility, and check the spam risk level. Emails must pass the error check before you can publish and use in a customer journey.

12. Click  **Save** .

13. If you want to include the email record in a customer journey, click  .  
Otherwise skip this step.

14. Click  to close the record.