

Below are the base instructions on how to log in and send out the Budget summary communication.

To edit the Budget communication/email you need to:

1. Log on with your account details – username & password
2. Click on *Client Communications* from the top navigation bar
3. Select and click on the communication titled **Federal Budget 2021 summary**, or it will be something very similar to this. It will be the first one listed on the morning of Wed 12th May
4. Default *Welcome text* is entered for you, if want to edit this text click on *Edit Welcome text* from left hand editing option menu
5. If pasting content from Word or Outlook say “Yes” to the pop-up box, then;
 - a. Paste content into the “Paste from Word” pop-up and click “Insert”
 - b. Otherwise say “No”
6. Edit the dates in the welcome text and add any extra text
7. Scroll to bottom and click **SUBMIT**
8. Send a test email - you'll find this option in the second top nav bar, then:
 - a) Type in a *Notification email subject* line
 - b) Fill in *To Firstname*
 - c) Fill in *To Email*
 - d) click on *Submit*

Then view your email browser inbox to check the test email.

Note - In the *From name* & *From email* fields the test email uses the admin email account details, if one is set up. Otherwise it uses the default account email details.

To send out the Budget memo you need to:

1. Get your [client email list set up in the correct format](#).
2. [Upload your email list into subscriber management](#) - do this BEFORE Wednesday 12th May
3. Click on *Client Communications* from the top navigation bar
4. **Select the *Federal Budget Summary* communication, it will be the first one listed on the morning of Wed 12th May**
5. Click on *Send Out*
6. Check the ***Notification email subject*** line and edit it if needed
7. Tick the box next to "*Sendout clientalert* " or *All Subscribers* or select *your Mailing Groups* and click "Continue "
8. **Read the final screen and check your email list by clicking on the link *View list of subscribers***
9. Then click on *Confirm and send*

If you have any questions please feel free to call Donna or Peter on 02 4342 1888