Guide to Benchmark

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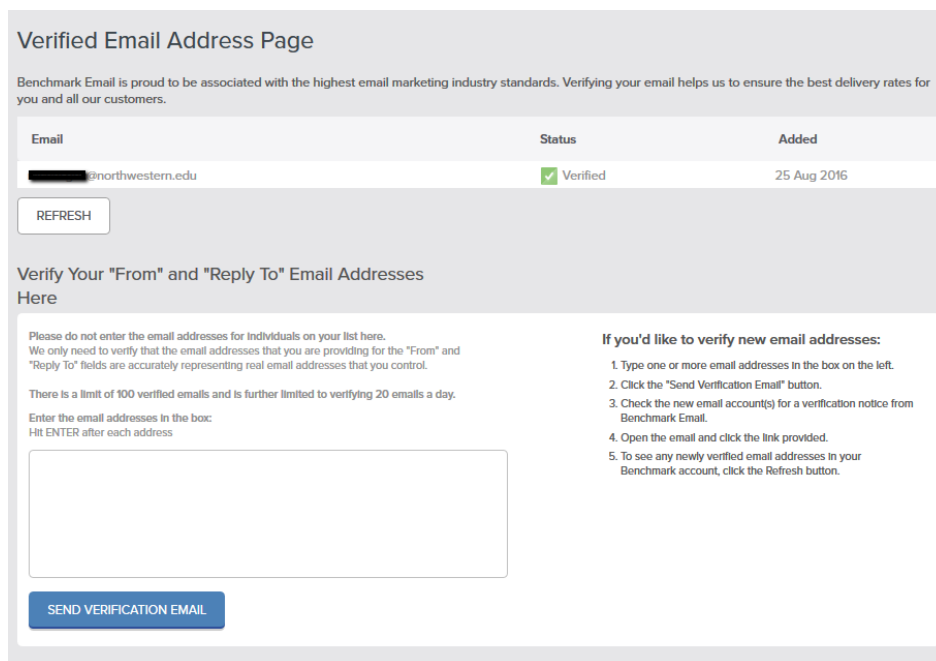
1. Verifying Email Addresses

Before you can send any emails from Benchmark, you must verify at least one sender email address through Benchmark. An email with a verification link is sent to the address. Click on that link to complete the verification.

Add additional addresses

a. Hover over the **Avatar** (see arrow) drop down on the top of the page and select **Email Verification** from the dropdown menu.

b. Addresses that have already been verified are listed at the top of the page. At the bottom, you can see the option to add new emails.

c. Add each email address you want to verify in the bottom box. If you're adding multiple email addresses, make sure to hit enter after each email address you add.

d. Click on **Send Verification Email**.
e. Check the email in the account you want to verify for the link.

Start-to-Finish Guide

1. Log into Benchmark

Go to www.benchmarkemail.com to log in.

Locate and click the "sign in" button. Use the assigned login and password to log into your Benchmark account.

2. Navigating the Dashboard

Video Overview of the Benchmark Dashboard

a. **Tool Bar**

Toward the top of the screen you will see a grey tool bar. This is the main tool bar. You can use this to access past emails, create new emails, look at reports, view galleries, and update contact lists.

b. **Tab**

There is a "Get Started" tab where you can start an email, organize your contacts, and access additional tools.

c. **Quick Add/Search**

Use the Quick Add search bar to quickly find a previously sent email or draft by searching the email name.

d. **Recent Email Statistics**

Quickly access the reports from your most recent emails.

3. **Create an Email**

   Video Overview of Creating an Email

   a. In the dashboard, go to the green **Create Email** button and select "Regular Email Campaign."

   b. Select the **Drag & Drop Editor** by clicking the blue button.

   c. Name the email and enter other details about the email.

      i. The **Subject** is what the people receiving the email will see.

      ii. **Email Name** is how your email will be saved in your archive. This is for your records, so name it something that helps you remember that template or content for later use.

      iii. By changing the **From/Reply Email Address** you can customize the addresses that the email is sent from and where you want replies to go to.

   d. Click **Save & Next** in the lower right hand corner to proceed to the next step.

   e. **Select Contact List(s)** by clicking on the box on the left of the contact list you want to email. If the contact list you want to use isn't already uploaded, click on **Create New List**.

   f. Click **Save & Next** in the lower right hand corner to proceed to the next step.

4. Upload Contact List

[Video Overview of Managing Your Contacts](#)

You can upload contacts individually or do bulk uploads.

a. Make sure your file is saved as an .XLS, .XLSX, .CSV or .TXT file.

b. In the Benchmark dashboard click on the **Contacts** Tab.

c. Click **Add Contacts to a List**.

d. Select the **Import Contacts from a file** option.

e. In Step 1, **select the contact lists** to which you want to add the new contacts.

f. In Step 2, **browse and upload the file** from your computer. You must confirm the terms of usage to continue.

g. In Step 3, the system will show your list in the Preview Section. Here you can match the Field Types for the columns in your list. For example, the First Name Column should be associated with "First name."

h. In Step 4, provide details about how the list was acquired. These are important to show that the list was not harvested or purchased. Click **Save & Next** and you should receive a message that your list will be uploaded in a short while.

Note: It can take approximately 15 minutes for your larger lists to be uploaded.

5. Edit your email

In the Editor you have three choices to create an email; Layouts, Benchmark created Templates, and Past Emails. To access the templates created for you by Weinberg College select **Past Emails.**

    a. Use the **Drag and Drop** editor to adjust the templates.

    b. Click in the blocks and type to edit the content.

    c. Style text color, font, and size using the toolbar at the top.

    d. Every section in the email can be rearranged by clicking and dragging it to its new position.

    e. As you edit, you can see how your campaign will look on desktop and mobile devices by clicking **Preview** in the bottom right hand corner.

    f. When you are done editing, click **Save & Next**.

6. Edit a Weinberg-produced Template

    a. Complete steps **a-f** of creating a new email. When choosing a layout, select **Past Emails**. The templates created by the master account will be saved there.

    b. Use the drag and drop editor to alter the template.

    c. To replace a template image, click on the image. In the left tool bar, select **Replace**. If your image is already uploaded to the gallery, click on it to insert it into the email. To upload an image select **Upload** in the top toolbar. Drag the image to the square or click **Browse** to upload your image.

    d. Finish editing text and send the email using the same steps as a newly created email.

7. Send

    a. In the **Schedule Delivery** window, make any changes to the subject line, test the subject line, or send as a draft.

    b. Choose your send time and click **Schedule**. You will receive a confirmation email when your campaign has been sent.

8. View Reports

    a. In the dashboard, click on **Reports** in the top menu.

    b. Choose **Email Reports**.

    c. Click on the Campaign name to see the report on that email.

    d. You can also compare campaigns by selecting several campaigns and click **Compare Reports.**

    e. All reports can be **printed** or saved as an **Excel** or **pdf file**. Click on the icons in the left hand corner to complete these actions.

Formatting and Branding Information

Heading 1: Bold, 14px, Black, Helvetica

Purple Hex Code: #4E2A84

Recommended Image Sizes

3 column image size: 356 x 300 pixels

Left/right text image size: 358 x 506 pixels

Long image/text image size: 800 x 357 pixels

See the [Weinberg College Branding Resources webpage](#) for more information.

Additional Resources

Editing Images in Benchmark

Other video tutorials

Benchmark FAQ

Email Marketing Resources

Benchmark's website has many articles about the basics of email marketing and ideas for improving your emails. Additionally, there are some good resources on Lynda.com (access through your Northwestern netID). If you are new to email marketing, a good primer course is "Email Marketing Basics."

Learn more about Lynda at Northwestern.