

# Creating a List for Sending Emails



# Agenda

Access Targeted Email

Creating a new/existing Email

Creating a list

Next Steps

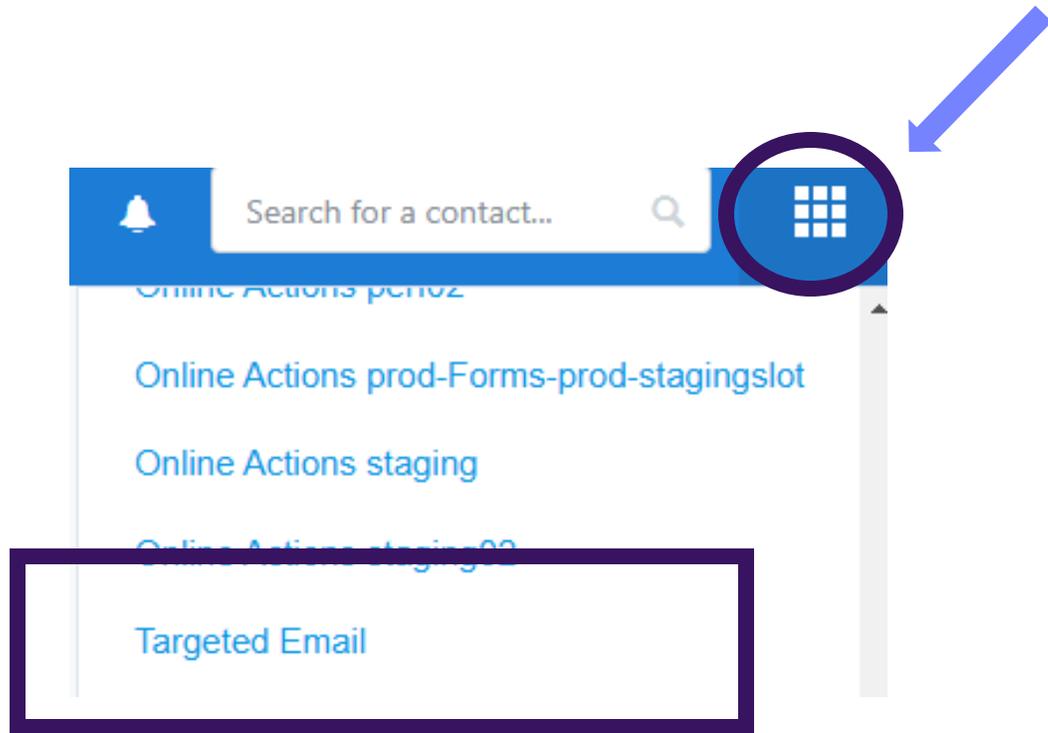
# Accessing Targeted Email in EveryAction

Log in to  
EveryAction

Locate and  
Access  
Targeted Email

Create a  
new/existing  
email

# Accessing Targeted Email



# Creating a New/Existing Email

Create An Email ×

New  From Existing

Email Name \*

Internal use only. Your recipients will not see this name.

**Choose your editor**

Drag & Drop Editor (new)  
Build engaging emails with adjustable content blocks. No coding experience necessary.

Classic Editor  
Build your own email from scratch using our visual editing tool, with access to source code for more advanced users.

Create An Email ×

New  From Existing

Email Name \*

Internal use only. Your recipients will not see this name.

Select an existing email Show 5 Per Page ▾

Frank Email Test ● Updated by Jaime Ransom  
Dec 23, 2024 8:38 AM

# Create a list

- Select Create a new saved Search

## Jaime Email Test

### Include In Audience:

**Build an Audience** (Recommended)

Combine multiple Saved Lists and up to one Saved Search to create an audience. Subscribers from a Saved Search will automatically update before send time. Subscribers from a Saved List will remain static.

#### Saved Search

Add a Saved Search to target a segment of your mailing list. ▼

Don't see the segment you need? [Create a new Saved Search](#) ↗

#### Saved Lists

You have no Static Saved Lists. Create a Static Saved List to segment your audience and improve open, click, and conversion rates.

### Exclude From Audience:

**Do not exclude segments**

No additional filtering required

**Saved Search and Lists**

Lists will remain static. Searches will automatically update before send time.

#### Saved Search

Add a Saved Search to exclude a segment of your mailing list. ▼

Don't see the segment you need? [Create a new Saved Search](#) ↗

# Create a list

CONTACTS

## Create A New Search

Step 1: (Start with anyone who meets the selected criteria)

FAVORITES

Click the stars below to move search criteria to the top.

OTHER SEARCH CRITERIA

› Activist Codes ★

› Addresses ★

› Age • Registration Date ★

› Asks ★

› Attached Files ★

› Automation ★

› Contact Status ★

› Contribution Summaries ★



Create a new search

## Save Search



New Search

Replace an existing Search

Folder\*

New Folder

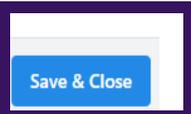
Name\*

Description

Up to 250 characters

Cancel

Save & Close



Save the new search

Let's try it out!

# Create a list

Step 1: Select Targeted Email

Step 2: Create New/Existing Email

Step 3: Select create a new Saved Search

Step 4: Create the list and save that list

Step 5: Select from the saved search your new saved list

Step 6: Continue to complete your email



# What's next?

# Additional Resources

# Support

- Contact your System Administrator
- Email [help@EveryAction.com](mailto:help@EveryAction.com)
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



# Help Center Resources

- [How to: Track Targeted Email performance and statistics](#)
- [Fundamentals: Email performance terms](#)
- [Training Webinar: Sending and Reporting on Emails](#)
- [Improving Email Deliverability with Email Scoring](#)



# Additional Training

- Bonterra Academy:  
<https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup>
- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy



Thank You for Attending!

