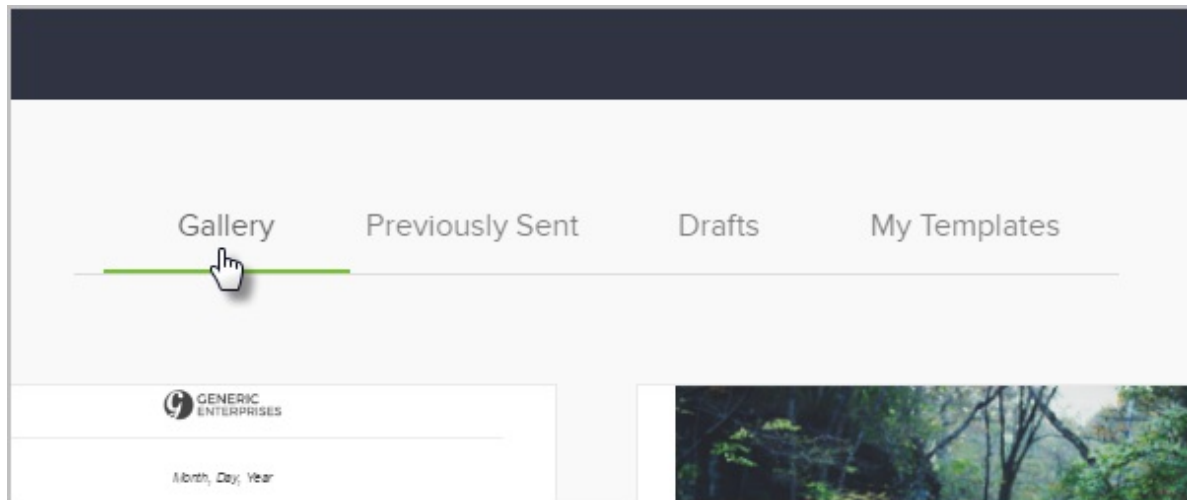


# How to use the Email Builder

## 1. Choose your template



You can choose from:

- **Gallery:** The Gallery contains several starter templates that you can use. Just hover over the template icon and click the "eye" icon to preview the template, or click **Use Template** to start customizing it.
  - **Previously Sent:** This section contains a list of the most recent email broadcasts that you've sent. Hover over the template and click **Use as Draft** to start customizing it. You can also click the **Save** icon to save the template to the "My Templates" area.
  - **Drafts:** When you are customizing an email template and click the **Save & Exit** button, the email will be saved as a draft so that you can come back to it later.
  - **My Templates:** To save an email template to the "My Templates" area, click on **Previously Sent**, hover over the email template and click the **Save** icon. To save a template while in the campaign builder, click the **Actions** drop-down while customizing the template and select, **Save to My Templates**.
2. Chose the Email Broadcast recipients. Click inside the search box to find an existing tagged list, or click the **New Search** link to create a new list to send this message to. (Optional) Click the **Recipient options** link if you need to change the default "To" email address.

Recipients: leads|

SAVED SEARCHES

Subject Line: Hot Leads

**YOUR MOST RECENT + NEW POST TITLE**

Customize this section by editing the text, adding your own copy, using the options **bold**, *italicize*, or create links and bullets, or use the options in the "Design" panel change the font styles of your email.

### 3. Enter a Subject Line

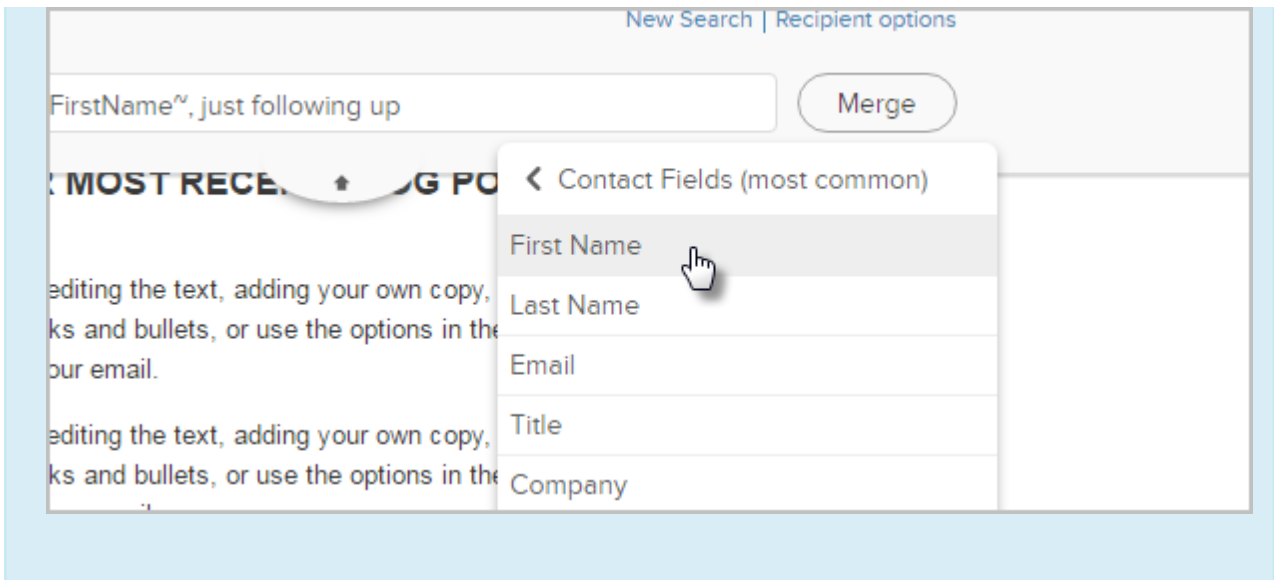
Recipients: Start typing to add tagged contacts or saved searches... [New Search](#) | [Recipient](#)

Subject Line: Hi "Contact.FirstName", just following up| [M](#)

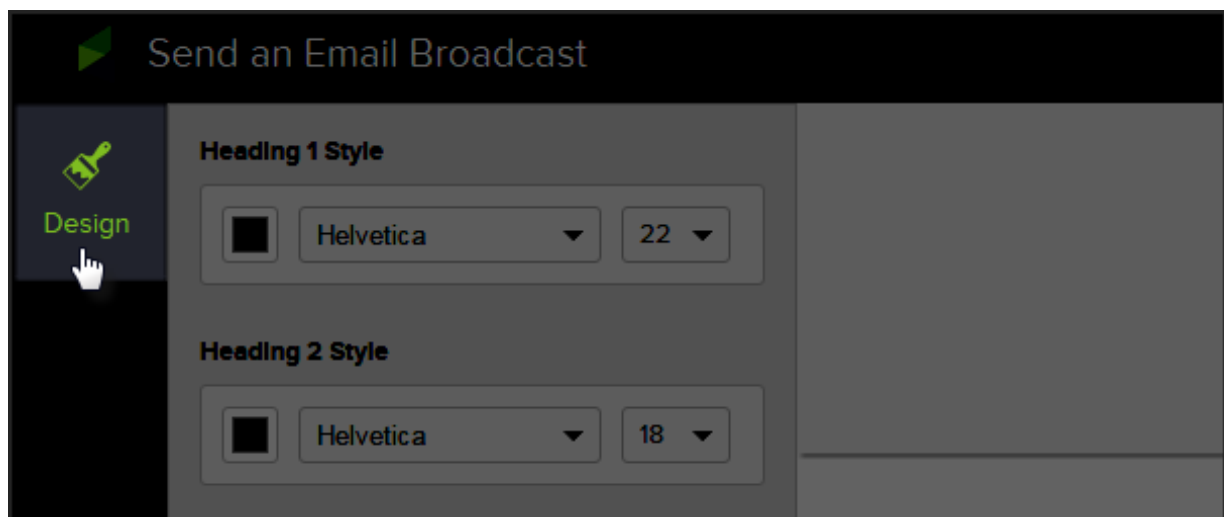
**YOUR MOST RECENT + NEW POST TITLE**

Customize this section by editing the text, adding your own copy, using the options above to **bold**, *italicize*, or create links and bullets, or use the options in the "Design" panel on the left to change the font styles of your email.

**Pro-Tip!** You can personalize the subject line by merging in the recipient's contact details. For example, if you want the subject line to call out their first name, click inside the subject line text box and click the **Merge** button > **Contact Fields (most common)** > **First Name**.



## Customize the Email (Design View)



Pro-Tip! Your work is auto-saved every 30 seconds

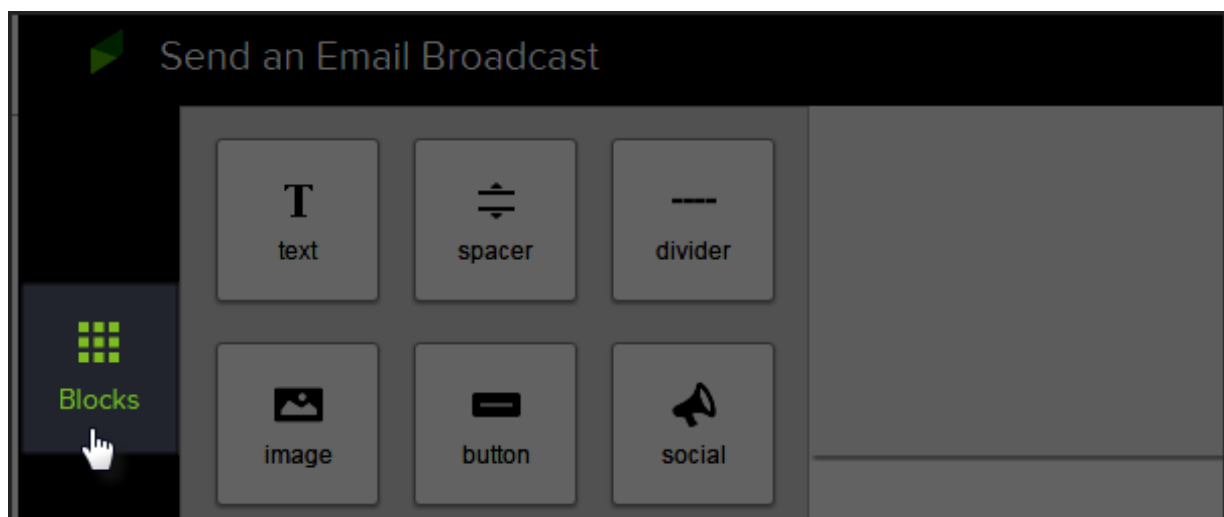
In Design View, you can style various attributes of the email.

- **Heading 1 Style:** This allows you to configure the font, color and size of any text in the template that is formatted as "Heading 1". You can specify text as "Heading 1" by

highlighting some text and choosing **Heading 1** from the drop-down.

- **Heading 2 Style:** This allows you to configure the font, color and size of any text in the template that is formatted as "Heading 2". You can specify text as "Heading 2" by highlighting some text and choosing **Heading 2** from the drop-down.
- **Normal Text:** This allows you to configure the font, color and size of any text in the template that is formatted as "Normal Text". You can specify text as "Normal Text" by highlighting some text and choosing **Normal Text** from the drop-down.
- **Hyperlink Style:** This allows you to format the color of hyperlinks in your email.
- **Email Background Color:** Changes the background color of the email.
- **Email Position:** You can toggle the position to **left-justified** (this is more typical when creating a personal, "hand written" email style) or **centered** for a more professional look.

## Customize the Email (Blocks)



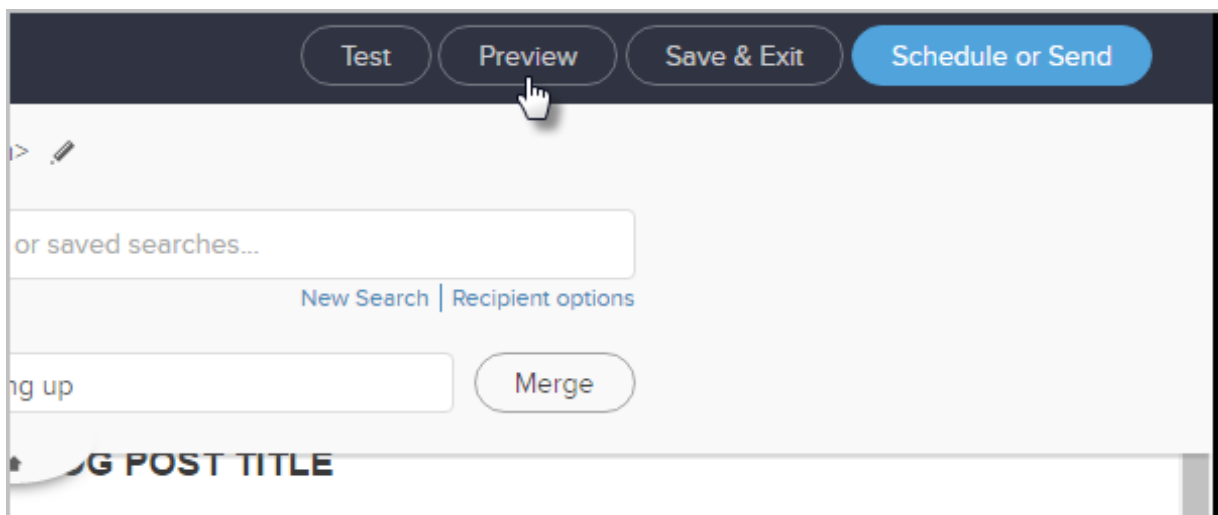
Click and drag blocks into your email to add new elements. To modify a block, select it and use the configuration panel on the left to make changes. For a Text block, just click inside the block and start typing.

- **Text:** Adds the most basic block for holding text.
- **Spacer:** Allows you modify the spacing between blocks (both vertical and horizontal).
- **Divider:** Adds a divider line across the width of the email.
- **Image:** Adds an image. You can choose an image from your image library, upload a new image, or link to an image on the web. Image files must be under 10mb!
- **Button:** Adds a button on the email. The button can be a link to a page on your website, or you can send them to web forms, landing pages, etc...
  - **URL:** Sends them to the web page of your choice.
  - **Email Address:** This is a "mailto" link which opens the recipients default email client when they click on it.
  - **Phone Number:** Adds a phone number link which can be interacted with on a

- mobile device.
- **File Download:** Adds a download link from your filebox. You can also upload a new file.
  - **Web Form:** Choose from a list of Web Forms that you have created. When the recipient clicks the button, they will be redirected to the form.
  - **Landing Page:** Choose from a list of Landing Pages that you have created. When the recipient clicks the button, they will be redirected to the landing page.
  - **Social:** Call out your social media channels with this block: Facebook, Twitter, LinkedIn, YouTube, Google+, Pinterest, and Snapchat.
  - **Group:** This block adds an image, text, and a button all in one block.
  - **Video:** Embeds a linked video thumbnail compatible with Wistia, Vimeo and YouTube.
  - **Signature:** Merges the signature from your user profile.
  - **HTML:** This block allows you to inject custom HTML into the email. There is a limit of 65,535 characters when saving to the My Templates area.

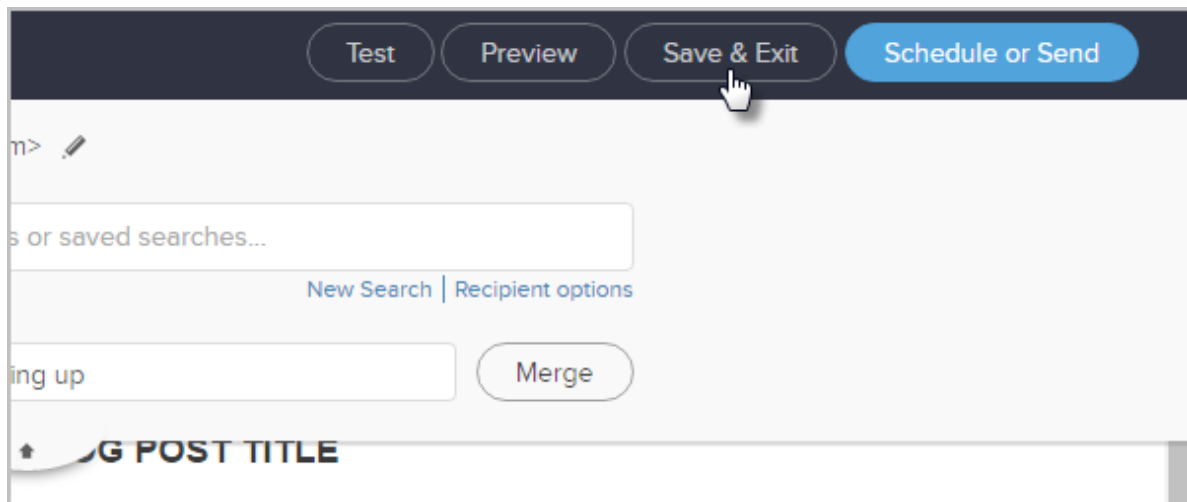
**Important Note!** Using custom HTML in responsive emails could impact the way your email displays on different devices. Please test all emails before sending them to your entire customer list.

## Preview and Test your email

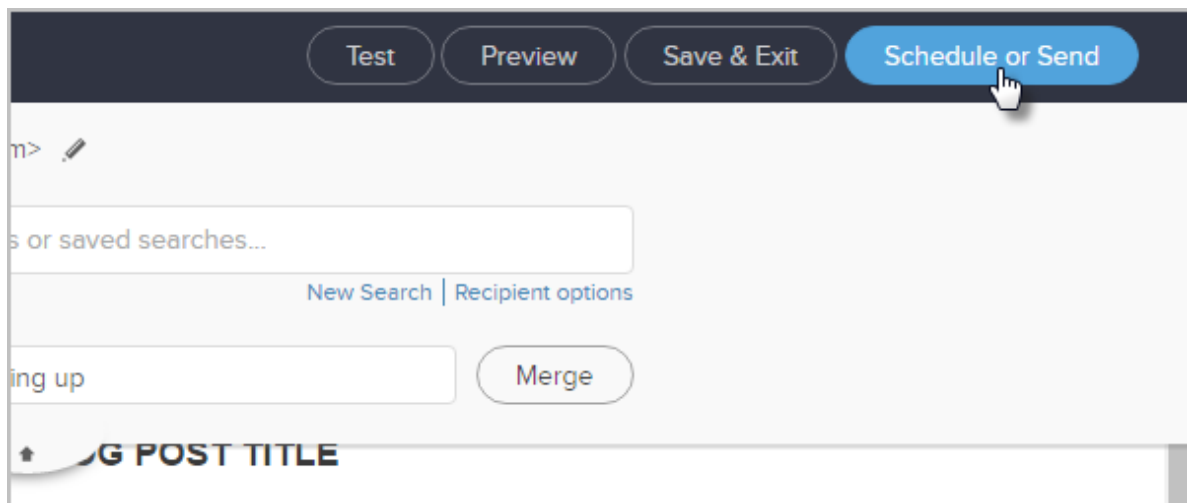


Click the **Test** button to send yourself an email, or just click the **Preview** button to see how the email will look in most email clients and mobile devices.

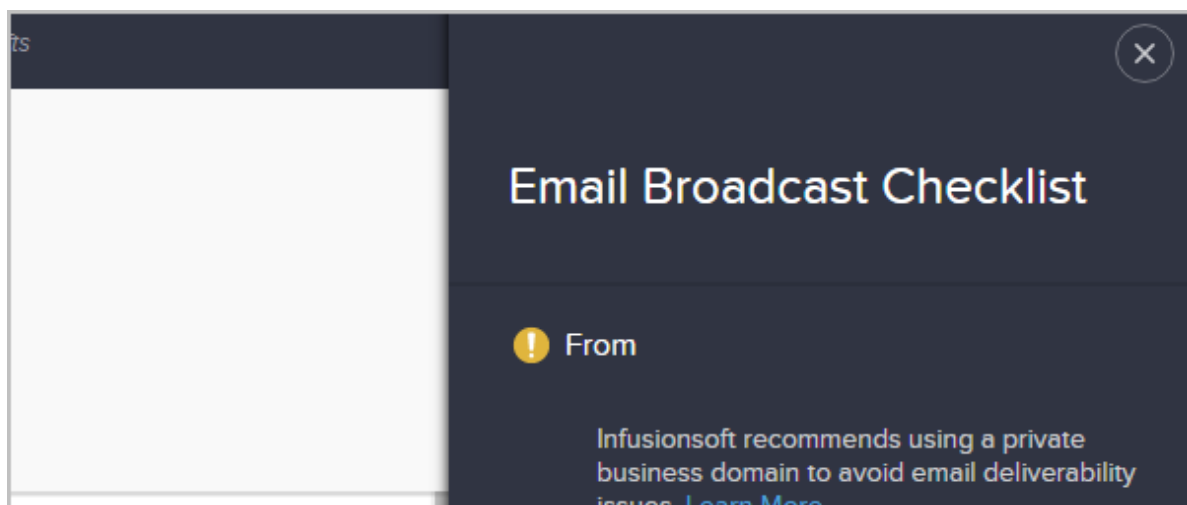
1. (Optional) Click **Save and Exit** to save this email in the Drafts area so you can come back and finish it later



2. Click Schedule or Send to View the Email Broadcast Checklist

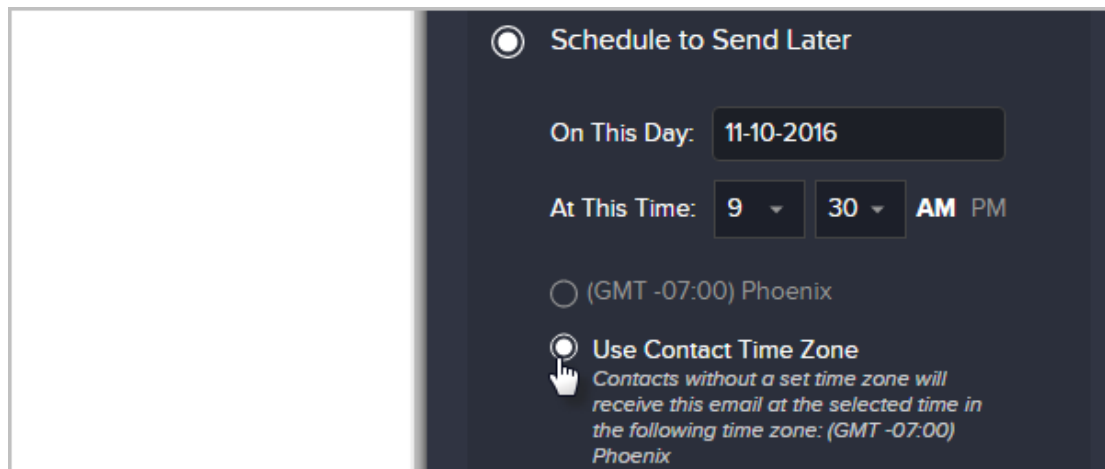


Send with Confidence! The Email Broadcast Checklist will scan your email for errors and suggestions.



When you are ready send, choose:

- **Schedule to Send Later:** You can schedule the email based on *your* time zone or the time zone that is on the [customer's contact record](#) .
- **Send Now:** Starts sending the email immediately



The screenshot shows a dark-themed interface for scheduling an email. On the left is a large white rectangular area. On the right, the 'Schedule to Send Later' option is selected with a radio button. Below this, there are input fields for 'On This Day:' (11-10-2016) and 'At This Time:' (9:30 AM). There are also two unselected radio button options: '(GMT -07:00) Phoenix' and 'Use Contact Time Zone'. The 'Use Contact Time Zone' option is highlighted with a hand cursor icon. Below it, a note states: 'Contacts without a set time zone will receive this email at the selected time in the following time zone: (GMT -07:00) Phoenix'.