How To Convert Existing Emails To The New Email Builder 🔗

For long-time Infusionsoft users, the prospect of having new and updated features is both exciting and potentially daunting. Each new wrinkle brings the possibility of necessary changes to existing content in order to ensure its continued functionality.

One example of this is converting Legacy edition emails into messages that can be used in the new email builder. Not everything can be converted. Certain types like code builder emails will not translate, as well as HTML, file attachments, and email signatures.

Campaign Builder

Option 1: If the email is already saved in templates

1. Ensure that emails are saved under Marketing Templates
2. Open the campaign sequence you want to change
3. Drag over a new email object and open it
4. Click the **Actions** button
5. **Import the legacy** template
6. Select the template name
7. Once selected, choose **Convert Template**
8. Review the email and make necessary changes. (Note: Not all information will convert, some tweaking may be necessary. Specifically, check the From, To, and Subject fields.)
9. Set to **Ready**, and then **Publish**

Option 2: Steps for Legacy emails that are not to be saved as a template

1. Open the campaign that includes the legacy email
2. Open the email
3. Click the **Actions** button
4. Note: Save as a template for future use!
5. Click **Actions** again (The email will close if you save it as a template)
6. Select **Convert to New Builder**
7. Review the email and make necessary changes. (Note: Not all information will convert, some tweaking may be necessary. Specifically, check the From, To, and Subject fields.)
8. Set to **Ready**, then **Publish**

Broadcast Email

1. Go to **Marketing > Email & Broadcasts**
2. Click **Get Started**
3. Click **Actions**
4. Select **Import Legacy Templates**
5. Select the desired template name
6. Click **Convert Template**
7. Review the email and make necessary changes. (Note: Not all information will convert, some tweaking may be necessary. Specifically, check the From, To, and Subject fields.)