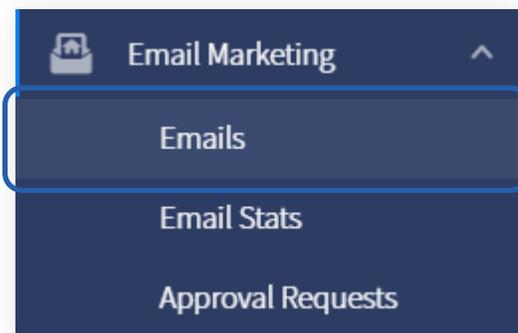


Create the Email

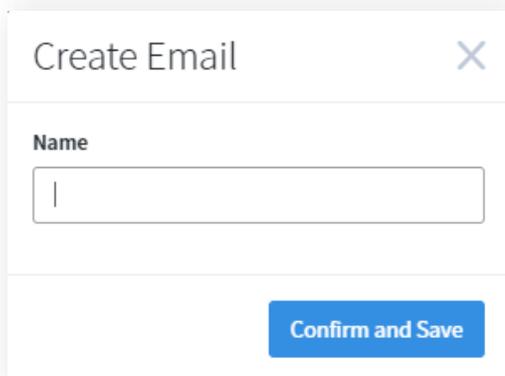
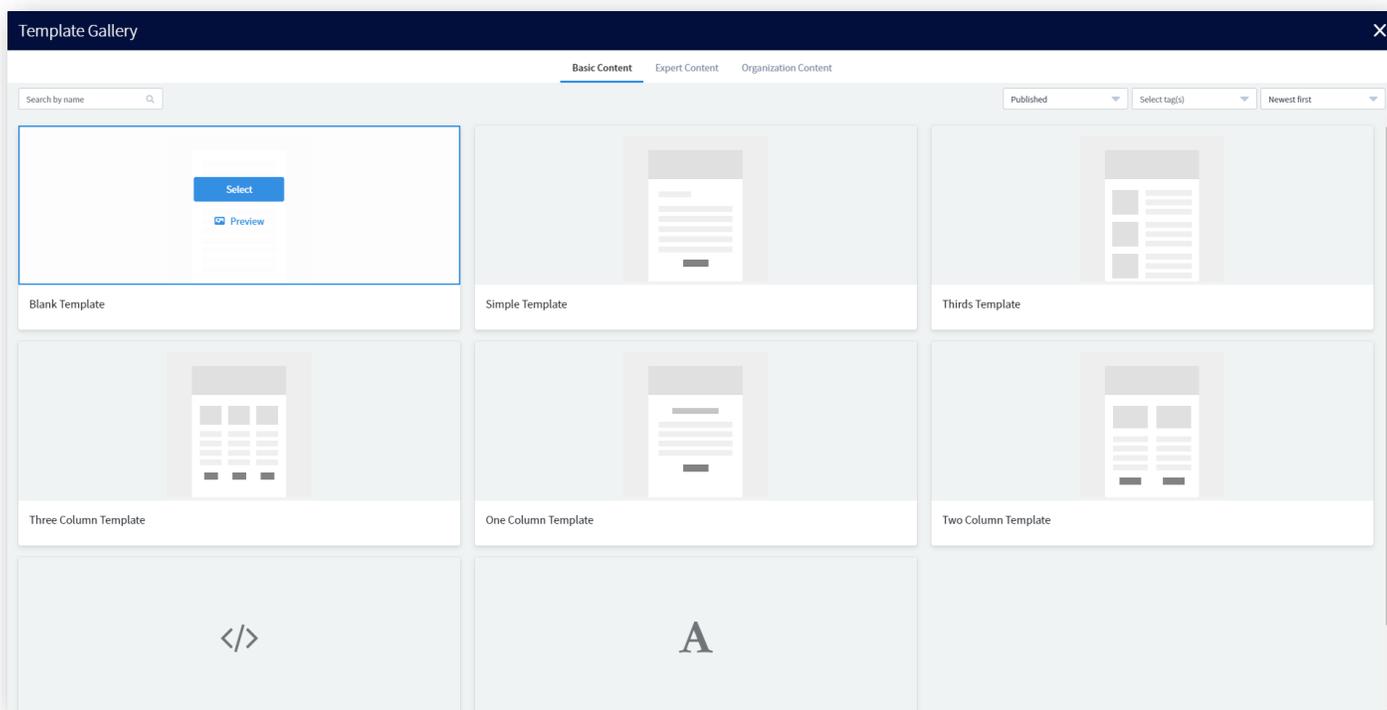


1. Log in to Total Expert Now.
2. Navigate to **Email Marketing** → **Emails**.
3. Click the **Create Email** button.



In the Template Gallery:

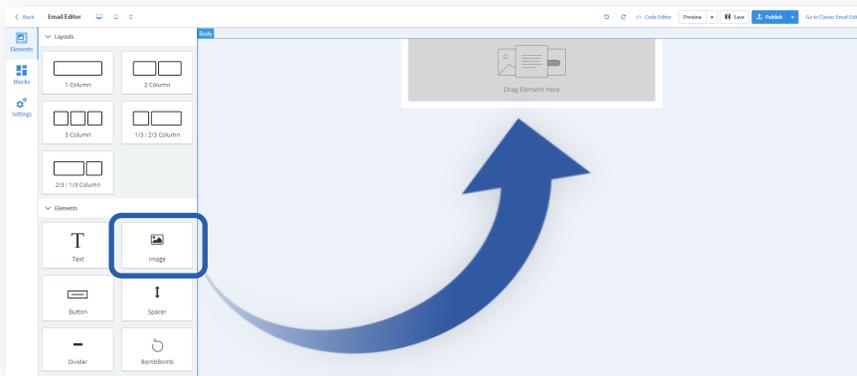
4. Click the **Basic Content** tab.
5. Hover over the Blank Template option and click the **Select** button.



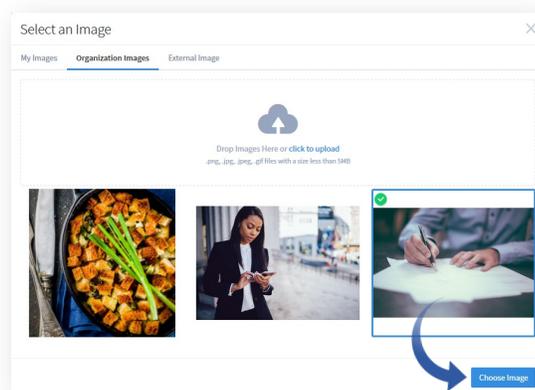
6. Enter a name for your email and click the **Confirm and Save** button.

Add Content: Image Element

1. Drag a **1 Column** layout onto the email canvas.
2. Drag an **Image** element into the placeholder in the row you just added.

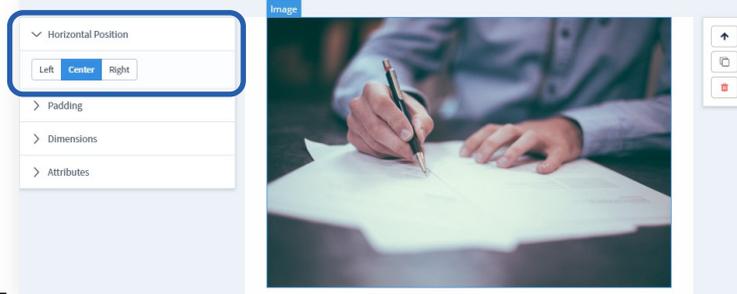


3. Double-click the element you just added. Select or upload an image to place in the email and click the **Choose Image** button.



4. Click the image to specify its options.

- a. In the **Horizontal Position** tab, position the image within its placeholder.
- b. In the **Padding** tab, set the margins around the image.
- c. In the **Dimensions** tab, enter values for the size of the image, in pixels. The aspect ratio of the image is always maintained.
- d. In the **Attributes** tab, enter a URL if you want the image to be linked. Add some alt text to facilitate recipients with screen readers or if the image fails to load for any reason.



▼ **Padding**

Top	Bottom
0 <input type="text"/> - <input type="text"/> + <input type="text"/>	16 <input type="text"/> - <input type="text"/> + <input type="text"/>
Left	Right
16 <input type="text"/> - <input type="text"/> + <input type="text"/>	16 <input type="text"/> - <input type="text"/> + <input type="text"/>

▼ **Dimensions**

Width	Height
524 <input type="text"/> - <input type="text"/> + <input type="text"/>	350 <input type="text"/> - <input type="text"/> + <input type="text"/>

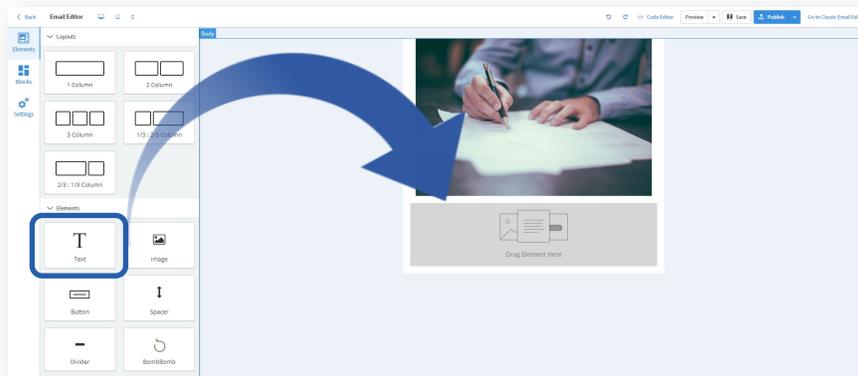
▼ **Attributes**

Url

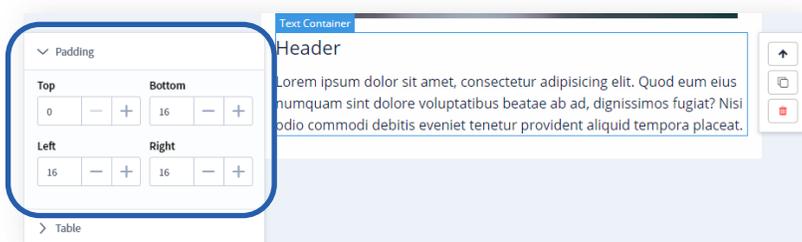
Alt Text

Add Content: Text Element

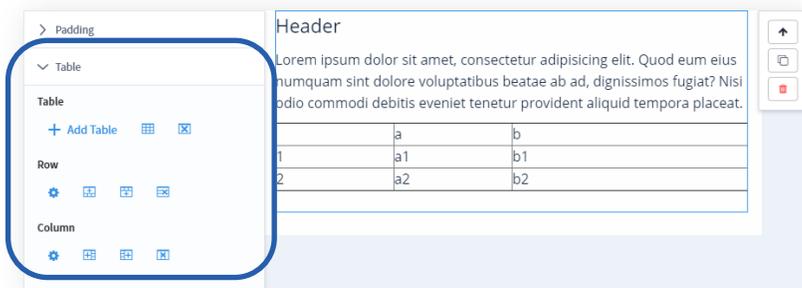
1. Drag a **1 Column** layout onto the email canvas.
2. Drag a **Text** element into the placeholder in the row you just added.



3. Click once on the element to specify its options.
 - a. In the **Padding** tab, set the margins around the text.

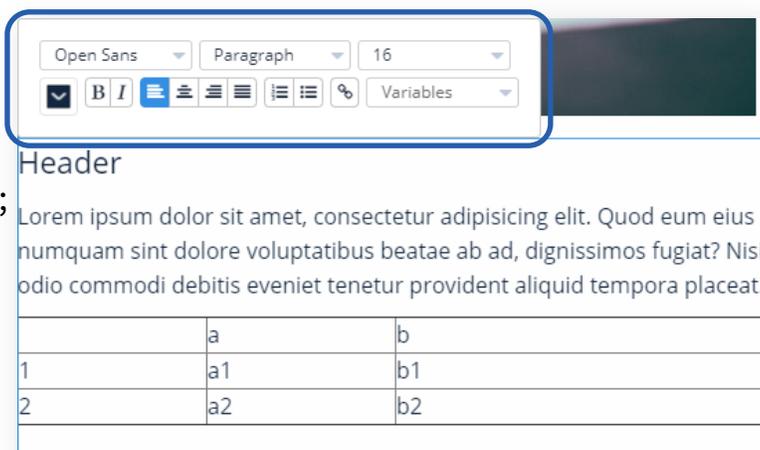


- b. In the **Table** tab, insert and format a table as part of the text element.



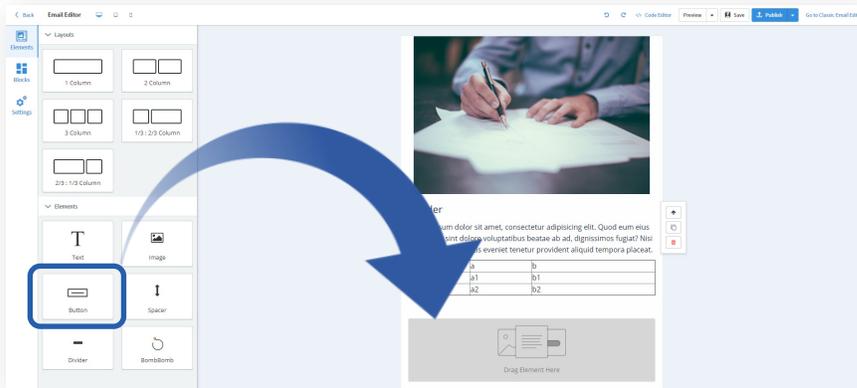
4. Double-click on the element to edit the text and apply formatting.

- a. Use the formatting toolbar to set font type, size, style, and color; set paragraph alignment and style, including bullets or numbering; define links; and insert text variable placeholders.



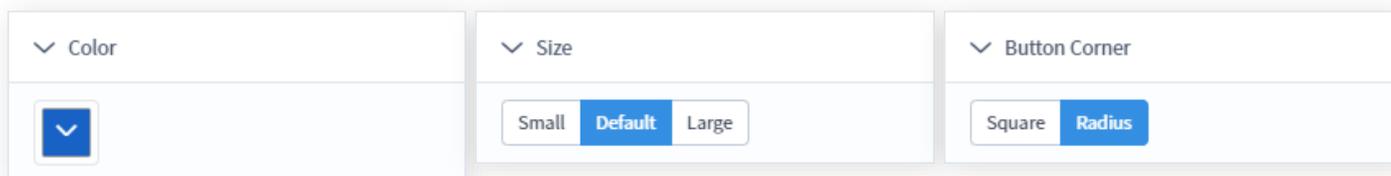
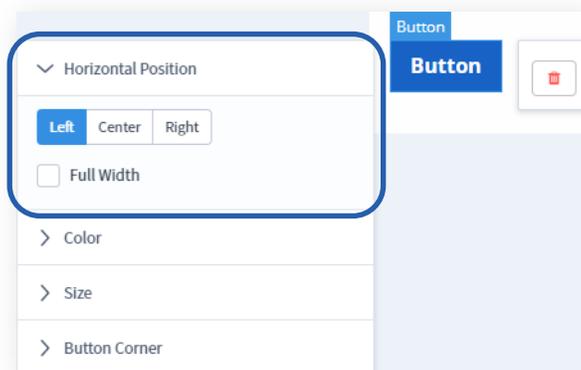
Add Content: Button Element

1. Drag a **1 Column** layout onto the email canvas.
2. Drag a **Button** element into the placeholder in the row you just added.



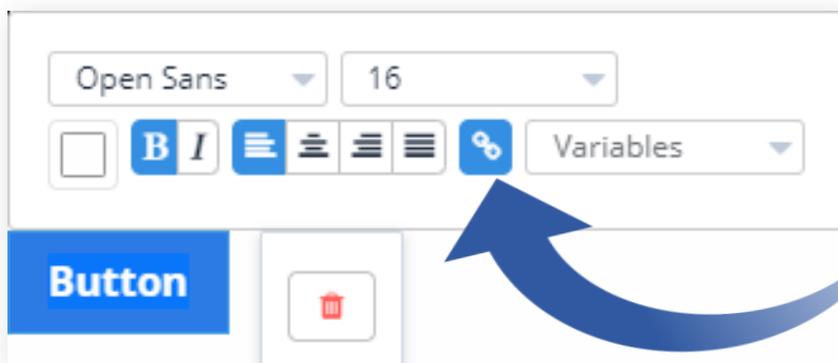
3. Click once on the element to specify its options.

- a. In the **Horizontal Position** tab, position the button within its placeholder or expand the button to the width of its placeholder.
- b. In the **Color** tab, select a color for the background of the button.
- c. In the **Size** tab, modify the size of the button.
- d. In the **Button Corner** tab, define the shape of the button's corners.



4. Double-click on the element to edit the text and apply formatting.

- a. Use the formatting toolbar to define the text on the toolbar. Options are similar to the Text element toolbar, but more limited.



- b. Click the link button to specify the location the button should link to and the text that should appear on the button.

Settings

Elements

Blocks

Settings

Email

Name

Subject

Description

Preheader Text ?

Upload Thumbnail

JPG/PNG files with a size less than 1MB

Transactional Email
[Learn More](#)

Bypass all email de-duplication
[Learn More](#)

Content Placeholders

Choose a sender and recipient to test dynamic placeholders.

Sender

Recipient

Styles

Style Sheet

Email

- *Name* is the name of the email shown in the list
- *Subject* is the subject line that will be applied by default to any emails sent using this template.
- *Description* is text that will help users locate and understand this email in their library.
- *Preheader Text* is preview text that will be shown to recipients before they open the email.
- *Upload Thumbnail* allows you to select an image file to be shown in the email library.
- Check *Transactional Email* to indicate that the template is for a transactional email, which is considered important messaging for a customer transaction or account. It gets priority over marketing emails is sent, even when the recipient has unsubscribed from marketing emails.
- Check *Bypass all email de-duplication* to allow emails using this template to be sent to the same email address multiple times in the same day. This is normally only used for testing purposes.

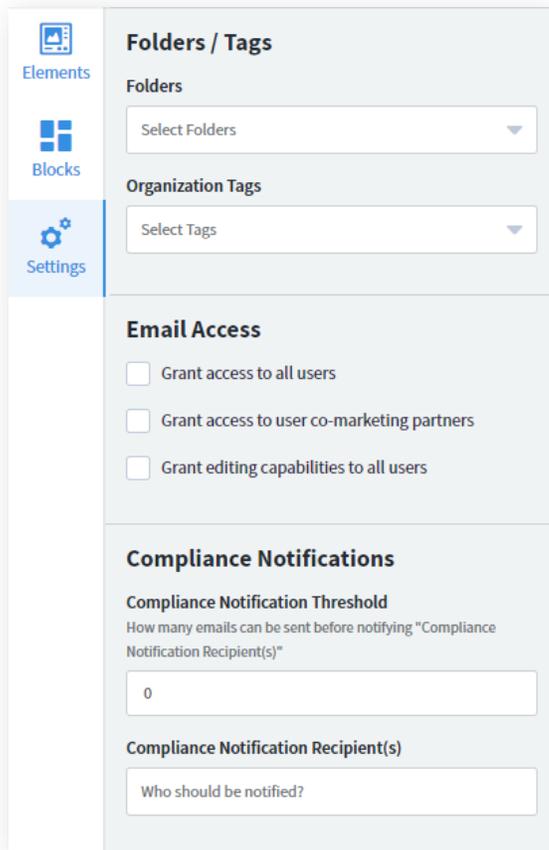
Content Placeholders

Select a user in the *Sender* drop-down list to determine whose information should be populated in `{{sender.xx}}` placeholders when previewing the template. With a sender selected, select a contact in the *Recipient* drop-down list to determine whose information should be used in `{{recipient.xx}}` placeholders.

Styles

Select an option from the *Style Sheet* drop-down list to apply a saved batch of CSS code to the email template.

Settings (continued)



Folders / Tags

Folders

Select Folders

Organization Tags

Select Tags

Email Access

Grant access to all users

Grant access to user co-marketing partners

Grant editing capabilities to all users

Compliance Notifications

Compliance Notification Threshold
How many emails can be sent before notifying "Compliance Notification Recipient(s)"

0

Compliance Notification Recipient(s)

Who should be notified?

Folders / Tags

- In *Folders*, select one or more pre-defined folders to be applied to the email template.
- In *Organization Tags*, select one or more pre-defined tags to be applied to the email template or create and add new ones here.

You can remove a folder or tag from the template by clicking the small x next to its name.

Email Access

These settings apply to all users in your organization.

- *Grant access to all users* makes the template available to every user in your organization.
- *Grant access to user co-marketing partners* makes the template available to co-marketing partners of any user in your organization who has access to the template.
- *Grant editing capabilities to all users* allows users with access to the template to be able to edit the body and subject line of the email before sending. Otherwise, they will only be able to select the recipients and the time and date they want to send it.

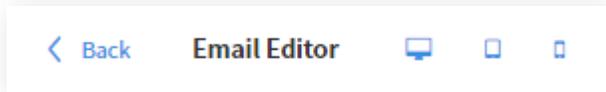
Compliance Notifications

Both of the following must be defined for the threshold notification to work.

- *Compliance Notification Threshold* determines the maximum number of recipients a user may select to send this email template to at one time before a notification is sent to the selected user(s).
- *In Compliance Notification Recipient(s)*, select one or more users in your organization to receive a notification when a user exceeds the threshold value above.

Header Buttons

1. Click the **< Back** button to return to the email library. Unsaved changes will be lost.
2. Use the **Desktop**, **Tablet**, and **Mobile** buttons in the header to get a sense of what your template will look like on various screen types.



3. Use the **Undo** and **Redo** buttons to step backward and forward through recent changes to the template.
4. Click the **Preview** button in the header to open a pop-up window showing the email, including values for any known text placeholder variables.
 - a. In the Preview button drop-down menu, select **Send preview to me** to deliver a copy of the current state of the template to your inbox.
5. Click the **Save** button.

