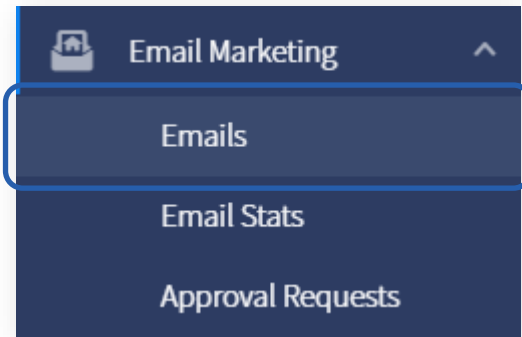


## Create the Email

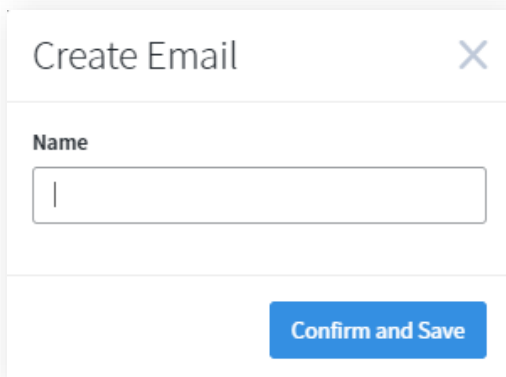
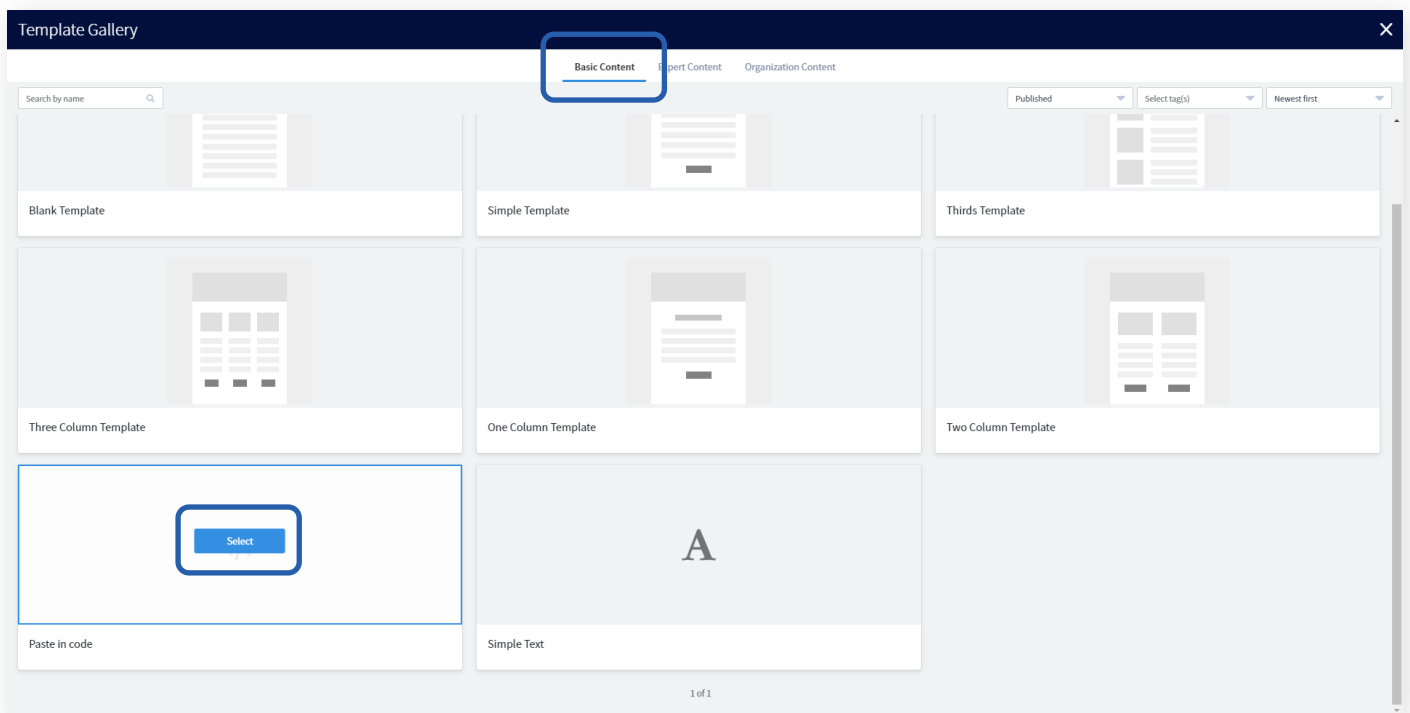


1. Log in to Total Expert Now.
2. Navigate to **Email Marketing** → **Emails**.
3. Click the **Create Email** button.



In the Template Gallery:

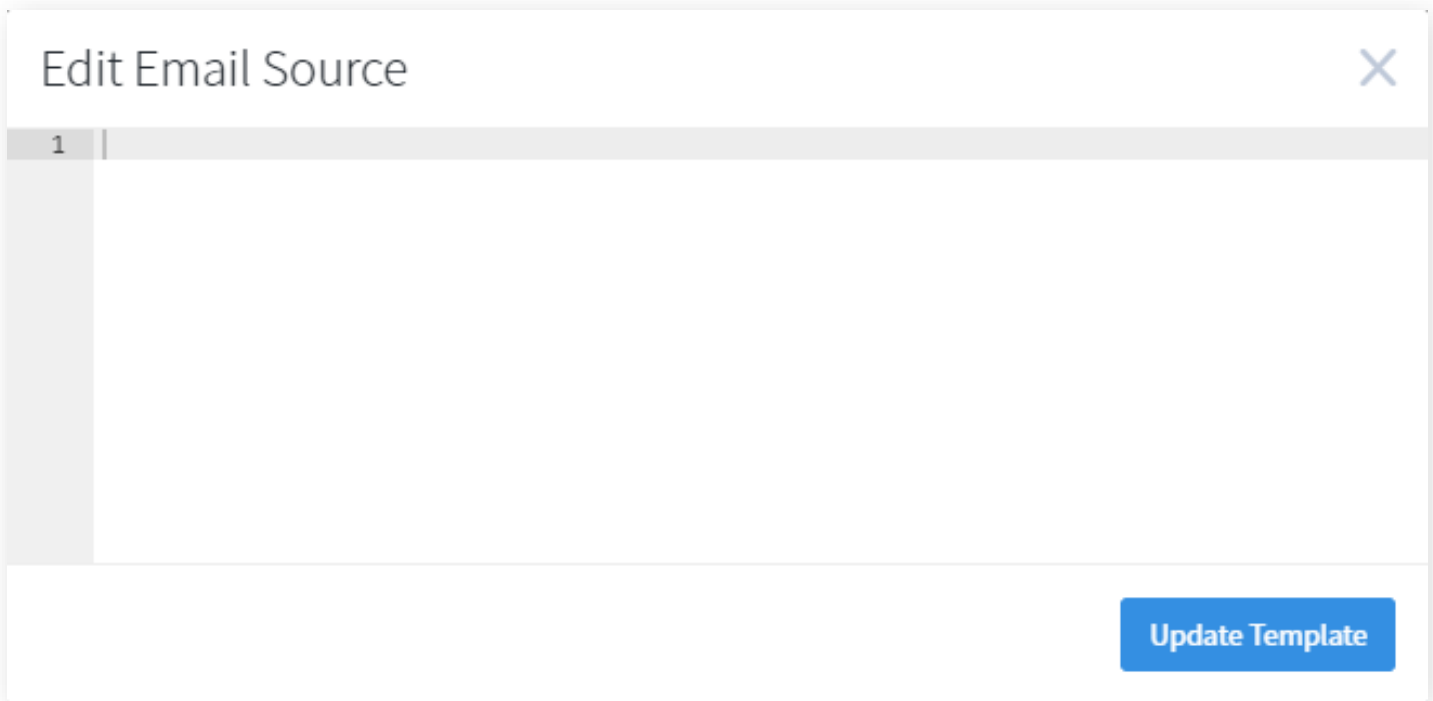
4. Click the **Basic Content** tab.
5. Hover over the Paste in code option and click the **Select** button.



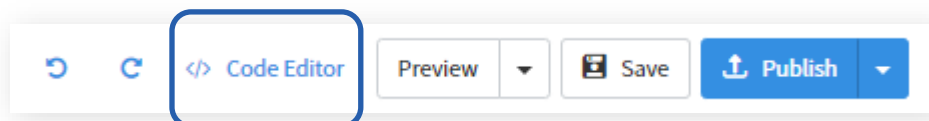
6. Enter a name for your email and click the **Confirm and Save** button.

## Add Code

1. In the Edit Email Source box, paste or write HTML code that will build your email as desired.
2. Click the **Update Template** button.



3. You can reopen the Edit Email Source box by clicking the `</>` **Code Editor** button in the header.



## 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**

Select 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.

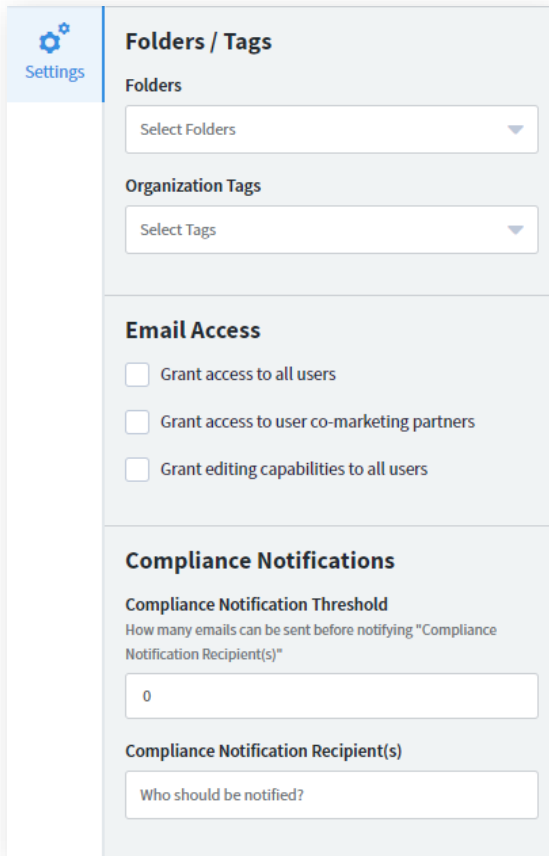
### Content Placeholders

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)



The screenshot shows a settings panel with a sidebar on the left containing a gear icon and the word "Settings". The main content area is divided into three sections:

- Folders / Tags**: Contains two dropdown menus. The first is labeled "Folders" and has a "Select Folders" placeholder. The second is labeled "Organization Tags" and has a "Select Tags" placeholder.
- Email Access**: Contains three checkboxes:
  - Grant access to all users
  - Grant access to user co-marketing partners
  - Grant editing capabilities to all users
- Compliance Notifications**: Contains two input fields. The first is labeled "Compliance Notification Threshold" with a subtext "How many emails can be sent before notifying 'Compliance Notification Recipient(s)'" and has the value "0". The second is labeled "Compliance Notification Recipient(s)" with a subtext "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.

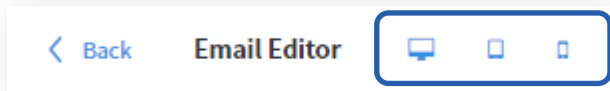
**Compliance Notifications**

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.

