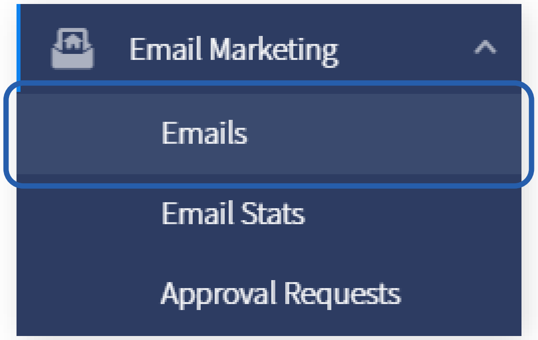
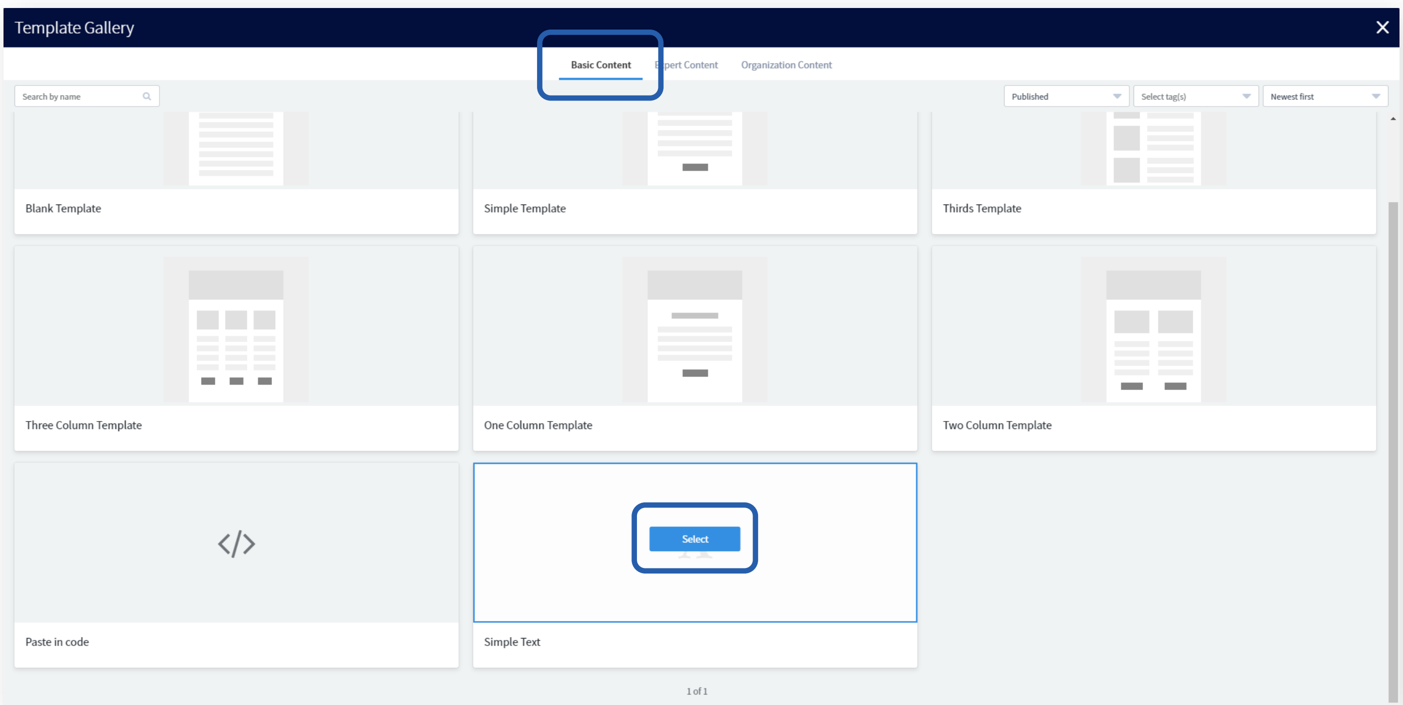
Create the Email

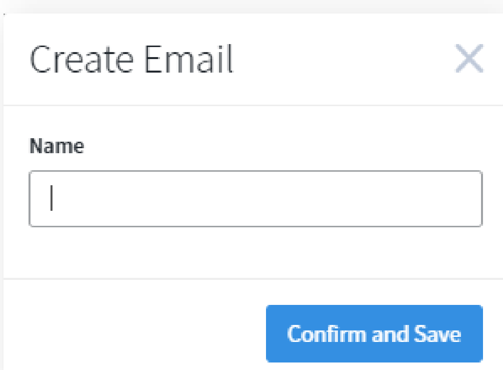


1. Log in to Total Expert Now.
2. Navigate to **Email Marketing → Emails**.
3. Click the **Create Email** button.

In the Template Gallery:

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

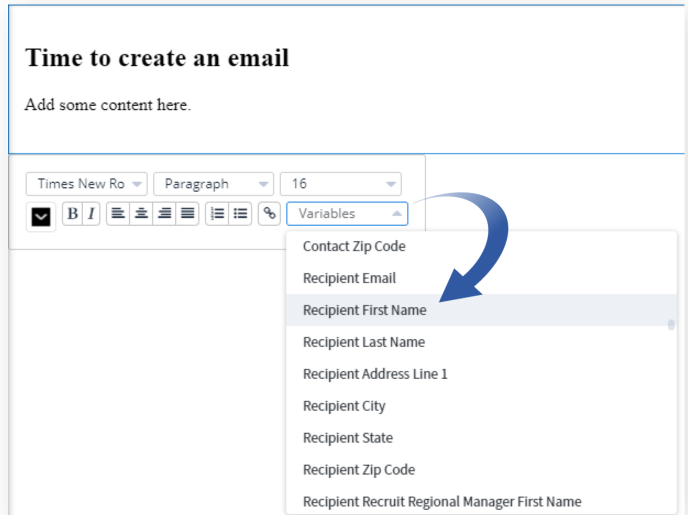




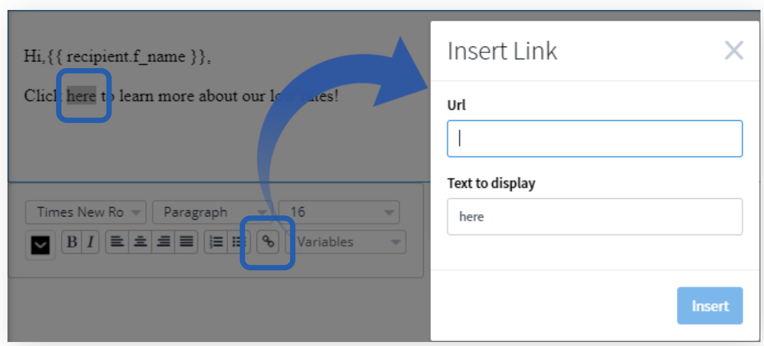
6. Enter a name for your email and click the **Confirm and Save** button.

Add Content

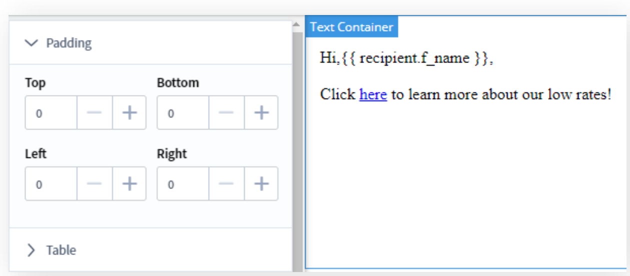
1. Double-click in the text area to modify the text and activate the toolbar.
2. Click the **Variables** drop-down menu and select **Recipient First Name** to insert the text placeholder.
3. The text and paragraph formatting options are comparable to standard word processing options.



4. To create a link:
    a. Select a portion of the text to add a link to.
    b. Click the **link** button in the toolbar.
    c. Enter a URL and click the **Insert** button in the dialog box.

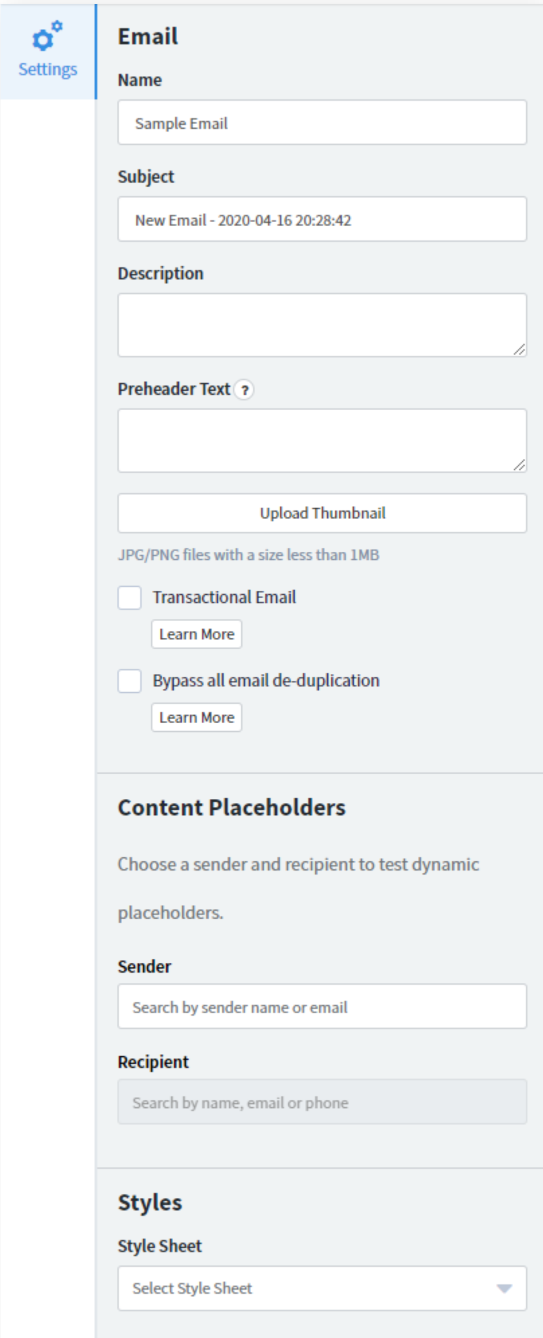


5. Note the menu to the left of the canvas.
6. Select **Padding** to adjust the amount of space around the sides of your content.
7. Click **Table** to insert and customize a table. Standard basic table editing options (add or remove columns or rows, adjust spacing, borders, and size) are available.



8. Place the cursor at the end of the text and use the Variables menu again to insert Sender text placeholders to create a signature line.

Settings



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.

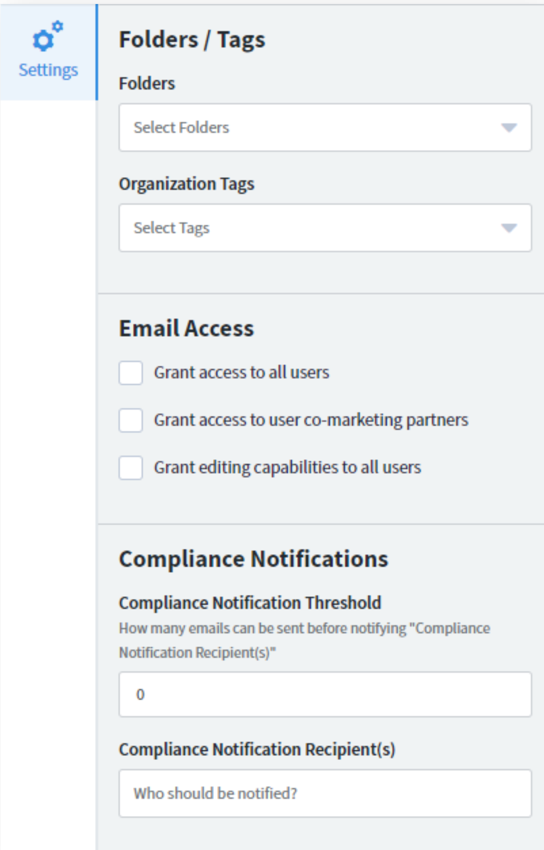
Content Placeholders

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

- 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.

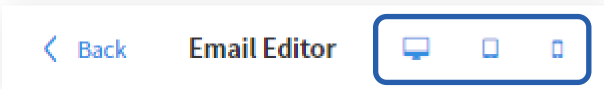
Compliance Notifications

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.