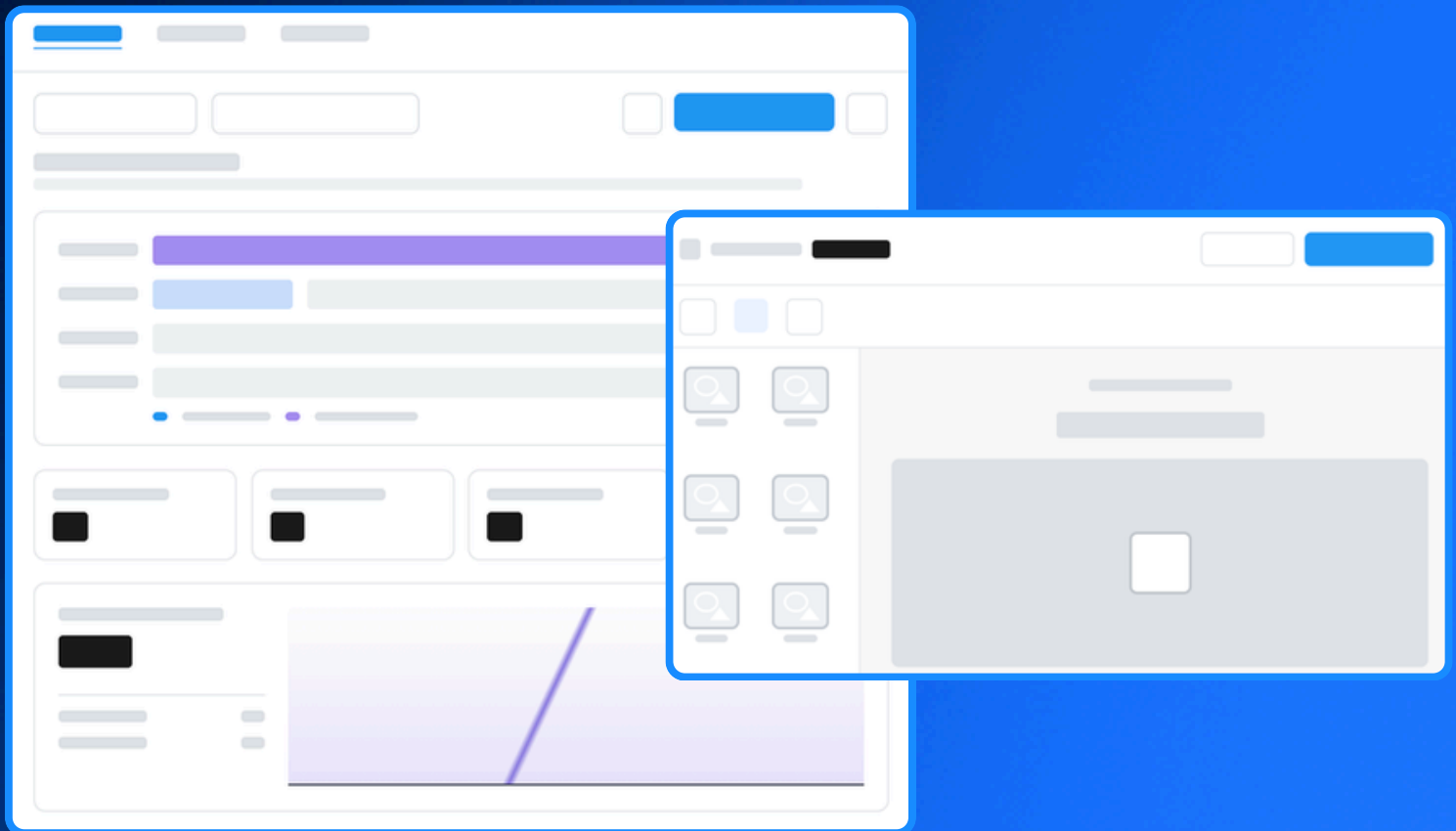


REFERENCE GUIDE

Email Marketing

Sending email campaigns start to finish



Campaigns, Templates and Folders

What It Is

A campaign is one email sent to many people. A template is a reusable starting layout. Folders in both areas keep them organized, and folders can sit inside other folders.

How It Works For Your Business

- Search for Email Builder to reach Campaigns and Templates. Search for Snippets too.
- Each campaign row has a status label, such as Draft, Sent, Failed, or Archived.
- The three dots on a row open a menu of actions for that campaign.
- Click New Folder to make a folder, and open a folder to make a subfolder inside it.
- Use the three dots, then Move to Folder, to file a campaign or template.

Campaigns, Templates and Folders – Tips & Guidelines

Tips

- Think of a template as the mold and a campaign as the cookie.
- Changing a campaign never changes the template it came from.
- Try one folder per year and one per month inside it.
- Status wording can vary, so read the labels your list shows.

DO

- Use campaigns for news to a group
- Build a few good templates
- Name folders by year and month
- Read the three-dot menu once

DON'T

- Message one person with a campaign
- Start from zero every time
- Dump everything in one list
- Edit a template by accident

Starting a Campaign

What It Is

You can start a campaign from a ready-made template, from a blank page, or from your own HTML code. Templates are the fastest and most polished way for most people.

How It Works For Your Business

- On Campaigns, click New, then choose Email Marketing Templates to open the library.
- Click a design to see it bigger, then click Continue to pick it.
- Name the campaign, then it opens in the builder. Click Save to keep your work.
- Look for the Blank option for an empty page, or the Code Editor choice to paste HTML.
- Open the three dots on a campaign and look for See Version History to find earlier versions.

Starting a Campaign – Tips & Guidelines

Tips

- Pick by layout, since structure is harder to change than colors.
- Name it for yourself. Contacts never see the campaign name.
- Stay with a template if you are newer to email building.
- Save right away so you can come back.

DO

- Choose layout before color
- Use a name you can search
- Click Save before leaving
- Check Version History if stuck

DON'T

- Name it Email 1
- Pick by sample pictures
- Start blank without a plan
- Forget to save

The Drag-and-Drop Builder

What It Is

The Design Editor builds emails by dragging pieces onto a canvas and clicking to edit them. A layout sets the columns, and elements like Text, Image, and Button go inside.

How It Works For Your Business

- Open Add Elements to find Text, Image, Button, Divider, Social, Footer, Code, Video, Shopping Cart, and RSS.
- Layouts set up one to four columns. Drag a layout first, then drag elements into it.
- Highlight text to use the in-line toolbar for bold, font, size, color, alignment, and links.
- Click an element to use the properties panel for padding, colors, and link addresses.
- Use Appearance in the top toolbar for rules that apply to the whole email.

The Drag-and-Drop Builder – Tips & Guidelines

Tips

- Follow the order layout, elements, style.
- Use one or two fonts so the email stays clean.
- Click every link after you add it.
- Look at the mobile settings in Appearance.

DO

- Start with a layout
- Use Appearance for global style
- Use properties for one-offs
- Click Save after each round

DON'T

- Bold every word
- Use five fonts
- Skip testing your links
- Fix one piece at a time globally

Custom Values and Defaults

What It Is

Custom values are tags that fill in each contact's own details, like a first name. A default value is the fallback shown when a contact has nothing saved for that tag.

How It Works For Your Business

- In a text block, look for the custom values option in the toolbar and choose a field like first name.
- The value appears in your text as a tag.
- Click the tag to open a small editor, type a fallback such as there, and click Save.
- A green tag means a default is set.
- You can use custom values in the opening line, the subject line, or inside a sentence.

Custom Values and Defaults – Tips & Guidelines

Tips

- Always set a fallback so nobody gets a blank.
- One or two personal touches feel warm.
- Preview with a sample contact to check the result.
- Choose a fallback that reads naturally in the sentence.

DO

- Set a default every time
- Check with a sample contact
- Keep fallbacks short
- Use tags where they fit

DON'T

- Leave a tag without a default
- Use ten tags in one email
- Assume every contact has a name
- Skip preview

Previewing and Testing

What It Is

Preview shows how your email looks on desktop, tablet, and mobile. A test email sends a real copy to your own inbox so you can check it before your contacts see it.

How It Works For Your Business

- Click Preview at the top right and switch between Desktop, Tablet, and Mobile.
- In preview, look for a way to pick a sample contact so custom values fill in.
- Next to Preview, click the three dots, then Test Email.
- Fill in sender name, sender email, receiver email, subject line, and preview text, then click Send Test Email.
- The unsubscribe link does not work in a test, and test sends do not count in your statistics.

Previewing and Testing – Tips & Guidelines

Tips

- Check mobile first, since most people read on a phone.
- Check images, then text size, then button size.
- Send a test to a second inbox too.
- If a test is missing, check spam and your sender email setup.

DO

- Preview all three sizes
- Test with your own address
- Open the test on your phone
- Fix and preview again

DON'T

- Send and hope
- Trust one device only
- Panic over the test unsubscribe link
- Skip the sample contact

Sending and Scheduling

What It Is

The send flow walks you through sender details, recipients, timing, and a final confirmation. After sending, the three-dot menu lets you pause or cancel a scheduled campaign.

How It Works For Your Business

- Click Send or Schedule, then fill in sender name, sender email, subject line, and preview text.
- Fix every warning on the Required Fields checklist. A verified sending domain is also needed.
- Choose recipients by Smart List, Tags, Segment, or individual contacts, and check the count.
- Choose Send Now, or Schedule with a date and time. Check the timezone shown, then confirm.
- Use the three dots to Pause or Cancel. Look for a reschedule option, and do it well before the send time.

Sending and Scheduling – Tips & Guidelines

Tips

- Send to just yourself first when you are learning.
- Use a sender name people recognize.
- Watch the status move on the Campaigns list.
- A sent email cannot be pulled back, so check first.

DO

- Check the recipient count
- Check the timezone
- Read the confirm screen
- Use Pause when unsure

DON'T

- Ignore warnings
- Use a strange sender name
- Reschedule at the last minute
- Send before testing

Templates and Snippets

What It Is

Template work covers building your own layouts, filing them in folders, and reusing them. Snippets are saved bits of text or email content you can drop in anywhere you write.

How It Works For Your Business

- On Templates, click New to start from blank, from the library, or from an import.
- Edit a template, then save it. Footer, Logo, Social, and Button elements make good reusable blocks.
- File templates in folders so the right one is easy to find.
- Use a template when you build a campaign and when you set up a Send Email action in a workflow.
- Search for Snippets. Text Snippets and Email Snippets can use custom values and live in folders.

Templates and Snippets – Tips & Guidelines

Tips

- Build one branded template with your footer and social icons.
- Keep the footer in your template so it never gets forgotten.
- Use snippets for replies and signatures you retype often.
- Edit a snippet before sending so it fits the person.

DO

- Reuse good templates
- Save footers and logos
- Use snippet folders
- Edit before sending a snippet

DON'T

- Rebuild the footer each time
- Keep ten copies of one template
- Type the same reply by hand
- Send a snippet unedited

Segments and Delivery Methods

What It Is

Segments build a recipient group with filters, right in the send screen. Delivery methods go beyond Send Now: batch sending, RSS sending, and Smart Send timing suggestions.

How It Works For Your Business

- In the send screen, create a Segment and click Add Filter. Filters can use tags, contact fields, email engagement, and activity.
- Add an OR Filter when a contact may match one rule or another. Save a segment to reuse it.
- Look for pre-built audiences, such as contacts engaged in the last seven days.
- Batch Schedule sends in groups. You set a start date and time, a batch size, and a repeat interval.
- RSS Schedule sends from a feed URL on a set frequency. Smart Send suggests a best time, and an AI Schedule option may appear.

Segments and Delivery Methods – Tips & Guidelines

Tips

- Use a Smart List for groups you send to often.
- Check the recipient count after every filter change.
- Batch sending spreads a big send over time.
- Labels for these options can differ by account.

DO

- Save segments you reuse
- Check the count
- Try a small batch first
- Test your RSS feed URL

DON'T

- Build the same filter twice
- Stack filters without looking
- Send a huge batch untested
- Guess at the feed URL

A/B Testing and Statistics

What It Is

A/B testing sends two versions of a subject or content to part of your list, then sends the winner to the rest. Statistics show how every campaign performed.

How It Works For Your Business

- In the send flow, find the A/B testing tab and choose Email Subject or Email Content, then add variations.
- Set the test size with the slider, a winner metric (Unique Open Rate or Unique Click Rate), and a test duration from 30 minutes to 24 hours.
- A/B testing needs at least 40 contacts. The winner is reported in your statistics.
- Open Statistics to pick a date range and see the Engagement Summary, Top Performing Emails, and Recent Email Analysis.
- Per-campaign stats show Delivered, Opened, Clicked, Bounced, Unsubscribed, and Spam Complaints. Look for Resend to Unopened in the three dots.

A/B Testing and Statistics – Tips & Guidelines

Tips

- Change only one thing per A/B test.
- Pick the winner metric that matches your goal.
- Look for Tag Contacts and export options in the stats.
- Resend to Unopened lets you set a delay window and a new subject.

DO

- Test one change at a time
- Allow enough test time
- Read Click Performance
- Give resends a new subject

DON'T

- Change five things at once
- Test with under 40 contacts
- Resend too soon
- Ignore bounces

Email Settings and Unsubscribe

What It Is

Email settings control how your emails are sent and who they appear to come from. They also cover the unsubscribe link, bounce handling, and tracking links back to your site.

How It Works For Your Business

- Search for Email Services to set up a dedicated sending domain and reply and forward settings.
- Your From name and address can come from more than one place, and a priority order decides which one is used.
- In Settings, Business Profile, General, look for the Include Unsubscribe Link toggle and custom text.
- You can also add custom unsubscribe links inside the builder.
- Look for Auto-enable Email DND on bounce, and UTM parameters with email attribution options in the send flow.

Email Settings and Unsubscribe – Tips & Guidelines

Tips

- Set up your sending domain before your first real send.
- Check which From address wins before you hit send.
- Keep an unsubscribe link in every campaign.
- UTM parameters help you see which email sent a visit.

DO

- Set up the sending domain
- Keep unsubscribe on
- Turn on DND for bounces
- Add UTM tags to links

DON'T

- Send without a verified domain
- Hide the unsubscribe link
- Keep mailing bounced emails
- Guess which From wins

Key Terms Glossary

Campaign

One email written once and sent to many people at the same time.

Template

A reusable starting layout you build campaigns from.

Status

A label showing where a campaign is, like Draft or Sent.

Nested folders

Folders placed inside other folders to keep things organized.

Builder

The editing screen where you design and write your email.

Layout

A column setup, from one to four columns, that holds elements.

Custom value

A tag that fills in each contact's own details.

Default value

Fallback text used when a contact has no value for a tag.

Smart List

A saved group of contacts you can send to again.

Segment

A custom recipient group you build with filters.

Snippet

Saved text or email content you can reuse when writing.

Bounce

An email that could not be delivered to an address.

Getting Help

Your software changes over time, so some buttons, labels, and menus may look different from this guide. If something does not match, check the Email Marketing help articles inside your account. They are always the most current.