



Email Marketing Automation Training

Courses

- 1. Advanced Automation
- 2. Content Blocks + Dynamic Content
- 3. Edit Footers
- 4. Automated Messages
- 5. Survey Creator
- 6. Site Visitor Signup Box
- 7. Template Editor



Template Editor





Create a Custom HTML Email Template

A template can be used to create multiple emails. This template will show your custom layout and can contain your company branding. You'll have access to a variety of premade templates and template block templates as a new user. However, if you would like to create a custom HTML email template, please follow the steps below.

- 1. Open the **Tools** folder
- 2. Click **Template Editor**
- 3. Click the Create New Template button
- 4. Enter a Subject (used as the template name)
- 5. Start creating the template or copy and paste your HTML code into the Source view
- 6. Create editable content areas, as explained below in the Template Help Instructions below
- 7. Save the Template
- 8. Your custom template will now show in the **Templates** section when creating a new message

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Template Help Instructions

You must specify what areas of the template are going to be editable by the user creating a message with it. By default, all areas of the template will be locked down and not editable. To specify what areas will be editable, you must surround them with <cicontent1> </cicontent1> tags.

- 1. Click **Source** to view the source code of the template
- 2. Find the area you would like to make an editable region
- 3. Surround the content with <cicontent1> </cicontent1> tags
 - a. Table cells , Span tags , and sections <div> all support the <cicontent1> tags
 - b. Each table cell, span tag, and section can hold only one content region
 - c. Cicontent tags are uniquely numbered, so after <cicontent1></cicontent1> you'll insert a <cicontent2></cicontent2>
 - d. There can be up to 100 <cicontent1></cicontent1> areas

Once a template is created, it will show under "Templates" when a user creates a new message.

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Create a Drag and Drop Template

A template can be used to create multiple emails. This template will show your custom layout and can contain your company branding. You'll have access to a variety of premade templates as well. However, if you would like to create a custom drag and drop email template, please follow the steps below.

- 1. Open the **Tools** folder
- 2. Click Template Editor
- 3. Click the arrow on the side of the **Create New Template** button, and select **Create New Templates (Drag and Drop)**
- 4. Enter a Subject (this will be used as the template name)
- 5. Start creating the template by dragging in content and row layouts
- 6. **Save** the Template
- 7. Your custom template will now show in the **Templates** section when creating a new message





Create a Message From a Template

To create a message from a custom template:

- 1. Click on the **Messages** folder
- 2. Click Create New Message
- 3. Select a custom template or one of the pre-built templates in the system
- 4. Edit the content regions by clicking once and selecting edit content
- 5. Customize a pre-built template using the tools at the top of the screen:
 - a. Edit Template Formatting (customize borders, background colors)
 - b. Clear Template Formatting
 - c. The Undo and Redo buttons go back and forth between edits to the template formatting only
- 6. Click **Save** to save changes

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