



# Creating an Email Campaign

## What is the purpose of email campaigns?

Email campaigns are a great way to empower partners to promote products and services while generating leads in a ready-made format. Emails include marketing assets, which allow partners to co-brand email campaigns, and can also include landing pages to generate leads through forms.

Emails allow partners to monitor the success of their marketing efforts through open and click rates using the reporting feature within marketing center.

## How do I create them?

Like forms, start by copying an existing email to use as a framework. Be sure to select an email that mirrors the type of email you want to create. (In other words, the email you create should maintain the same structure as the email you copied).

Once copied, update the content and images within the body of the email. Before activating the email, enter marketing center and send yourself a test email to ensure that the content and images are placed correctly.

## What will I do in this lesson?

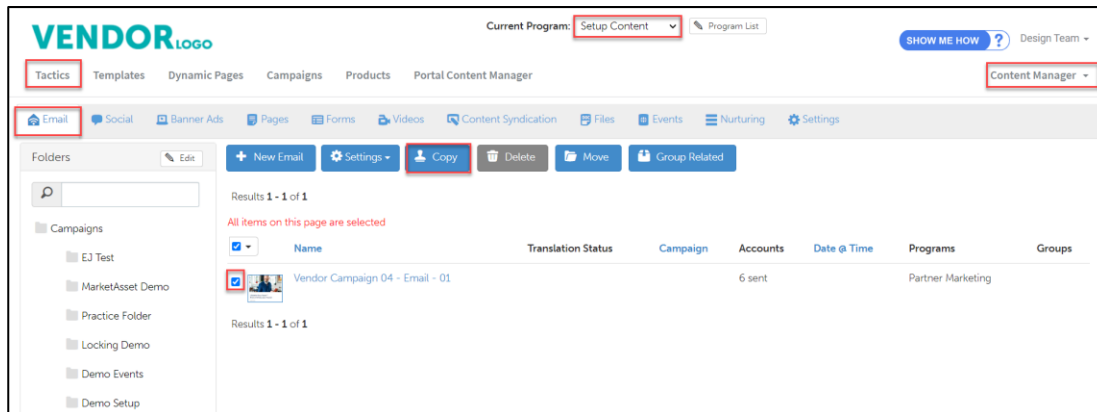
By the end of this lesson, you will be able to do the following:

- [Copy an email campaign](#)
- [Create email settings](#)
- [Add a subject line](#)
- [Delete body content](#)
- [Add banner](#)
- [Add body content & image](#)
- [Add button and attach landing page](#)
- [Run a test message](#)
- [Publish email](#) (This step is for **reference only**. Publish emails for partner use. **Do not publish practice email content created during this onboarding program.**)

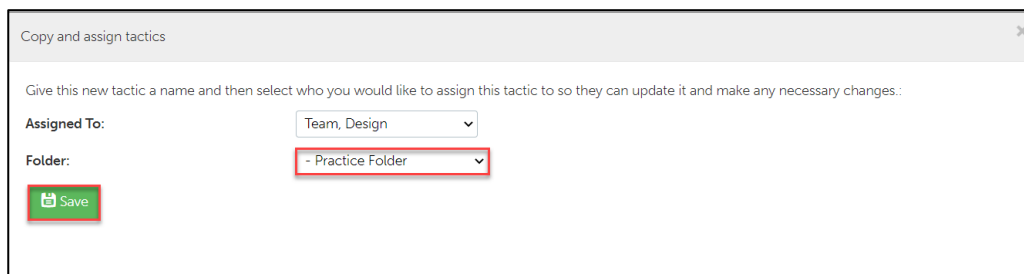
## Steps

### COPY EXISTING EMAIL

- 1 In **Content Manager**, from **Current Program**, select **Setup Content**.
- 2 From the **toolbar**, select **Tactics > Emails**. A list of existing emails appears.
- 3 Place a **checkmark** next to the email you want to copy. Then click **Copy**.



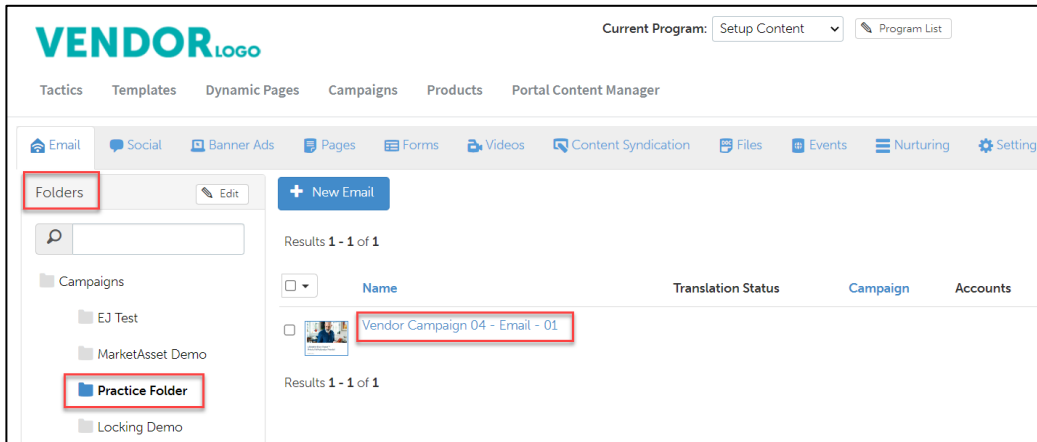
- 4 From the **folder** drop-down menu, select the **folder** to copy your email.



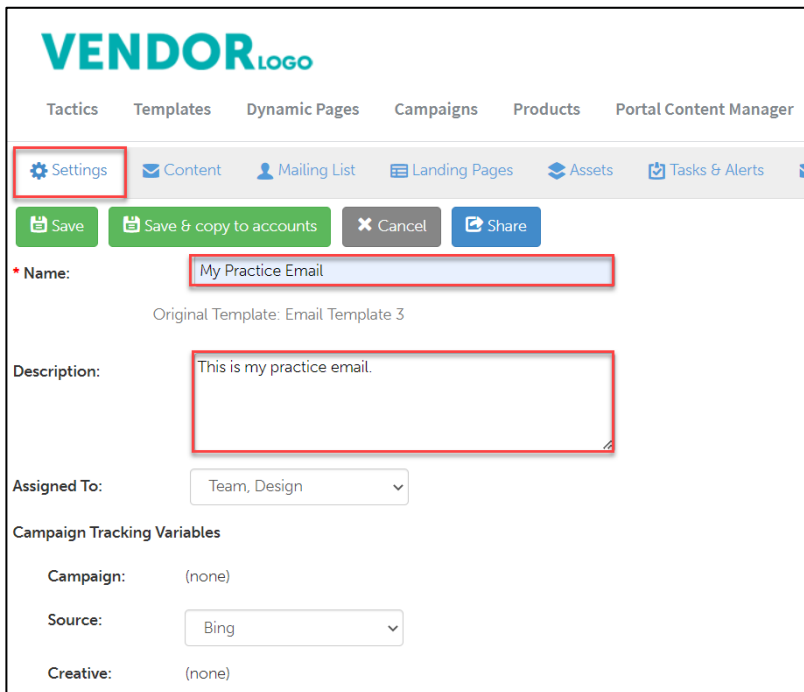
- 5 Click **Save**.

## CREATE EMAIL SETTINGS

- 1 From the **Folders** panel, select the **folder** for which you copied the email. Then select the **email**.



- 2 From the **toolbar**, select **Settings**.
- 3 In the **Name** field, type **My Practice Email**.
- 4 In the **Description** area, type **This is my practice email**.



- From **Send Email From**, select **Use the name and email address associated with each contact or account**.
- In **Custom Thumbnail**, click **Allow system to overwrite your thumbnail with a generic version**.

Send Email From:

Use the name and email address of the user associated with each contact or account.

Use this name and email address:

Name:

Email:

Note: We recommend using a marketing asset (ex. [MarketAsset123]) or the merge fields [MyFirstName], [MyLastName], [MyEmail]

Unsubscribe message:

Thumbnail image:  No file chosen (File must be in the following formats: .jpg, .gif, .png and 200 x 150 pixels)

Custom Thumbnail:  Allow system to overwrite your thumbnail with a generated version.

- In **Enable testing mode**, click **No, disable testing mode, I am sending out this campaign**.
- In **When would you like this to be available in the managed library**, click **Always**.
- In **What program would you like to use the campaign in?**, click **Setup Content**.
- In **Would you like to limit access based on account profile fields**, click **No**.

Enable testing mode: (Note: Make sure you copy all accounts)

Yes, I am still testing this message.

No, disable test mode I am sending the campaign out.

When would you like this to be available in the managed library?

Always

Only during the following period

Feature Campaign:

Feature this campaign in the library

What programs would you like to use this campaign in:

CMS-Live

CMS-Setup

Partner Marketing

Setup Content

Would you like to limit access based on account profile fields:

No

Yes

11 In **What attributes would you like to set for this asset?**, select **all attributes**.

What attributes would you like to set for this asset:

**\* Languages**

All

English (United States)

English (United Kingdom)

Spanish

**\* Marketing Focus**

All

Prospects

Existing Customers

Enterprise

SMB

12 Click **Save**.

## ADD SUBJECT LINE

1 From the **Email** toolbar, select **Content**.

2 In the **Subject** text box, copy & paste: **Simplify Content Creation**.

VENDOR<sub>LOGO</sub> Design Team ▾

Tactics Templates Dynamic Pages Campaigns Products Portal Content Manager Content Manager ▾

Settings **Content** Landing Pages Assets Tasks & Alerts Call Tracking Reports Related Tactics

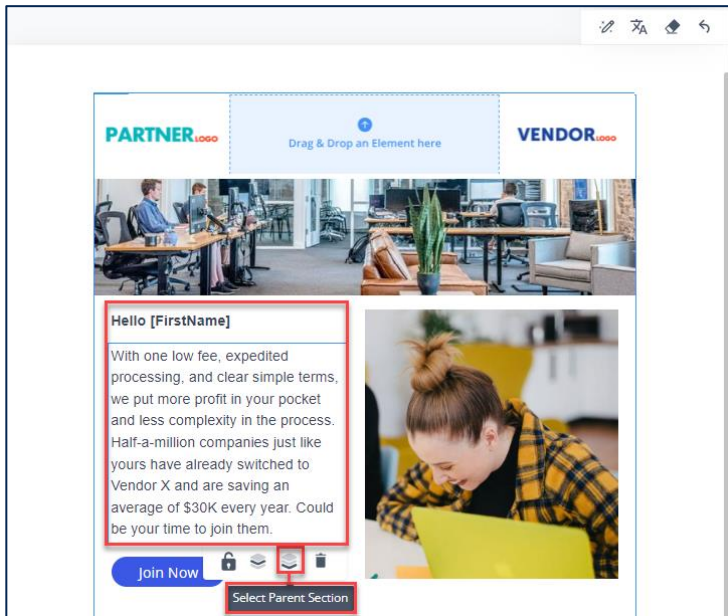
Download Test Email Edit Email

\*Subject:  
Simplify Content Creation

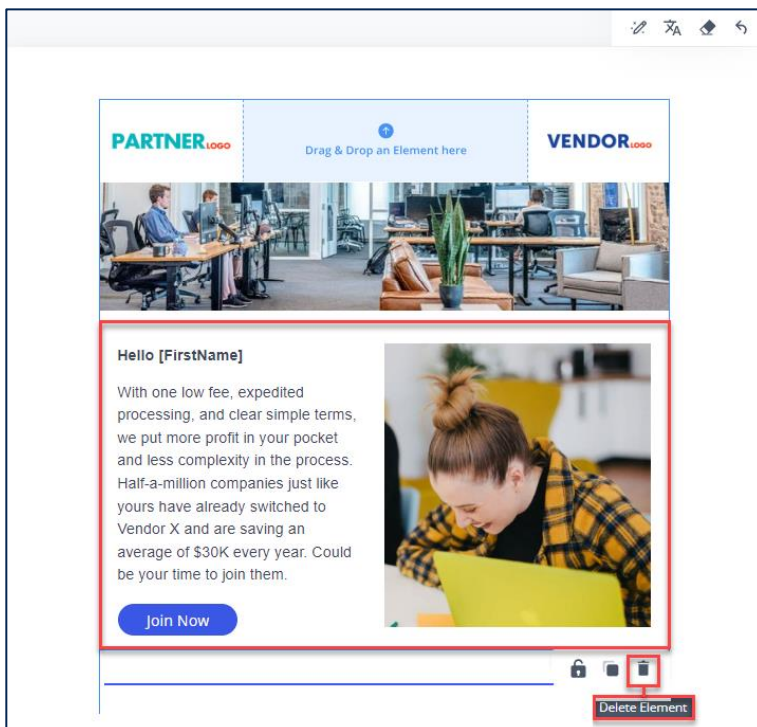
3 Click **Save**. Then click **Edit Email**.

## DELETE BODY CONTENT

- Note:** To ensure consistency across your content and save time, be sure to retain headers and footer. However, for best results, delete all body content and elements and start from scratch.
- In the **canvas**, for each **body section**, click the **Select Parent Section** icon.



- Once selected, click the **Delete Element** icon.

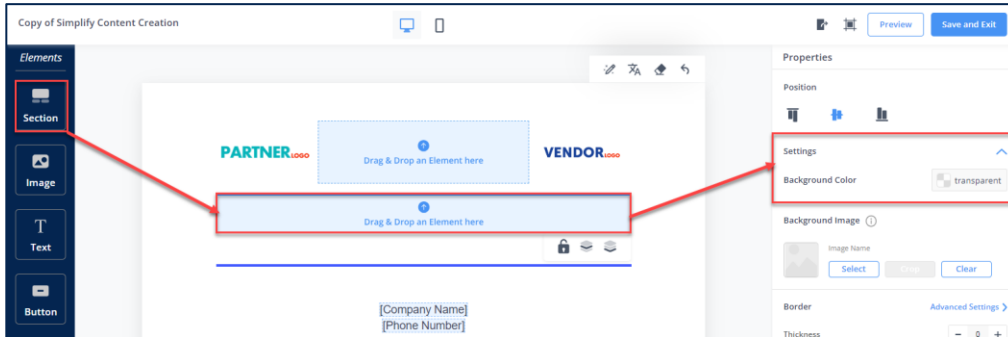


- Repeat steps 2 & 3 until all body content is cleared. (Note: Only the header & footer remain)

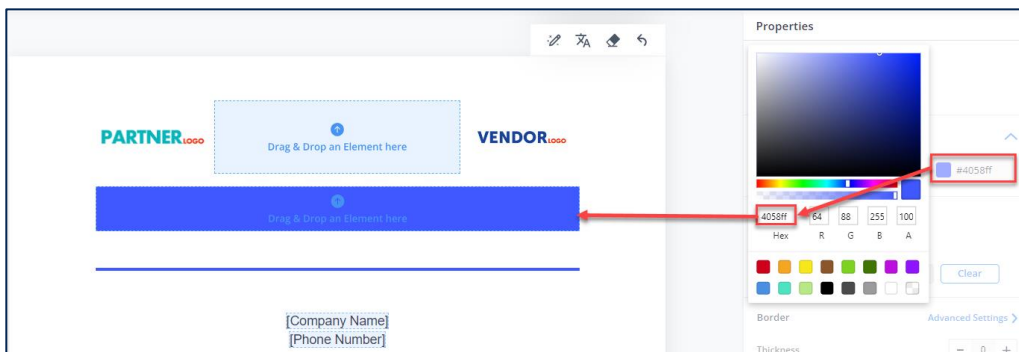


## ADD BANNER

- 1 From the **Elements** panel, drag & drop the **Section** element onto the canvas.
- 2 From the **Properties** panel, click the **Settings** drop-down.



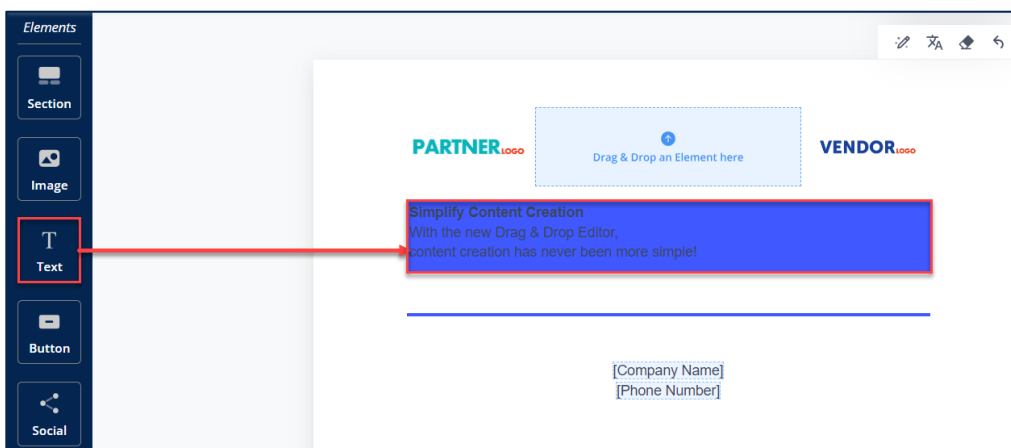
- 3 Click the **Background Color** option, then in the **Hex** box, type **4058ff**.



- 4 From the **Elements** panel, drag & drop the **Text** element into the section.
- 6 Double click inside the **Text** box, then copy & paste the following content into the text box:

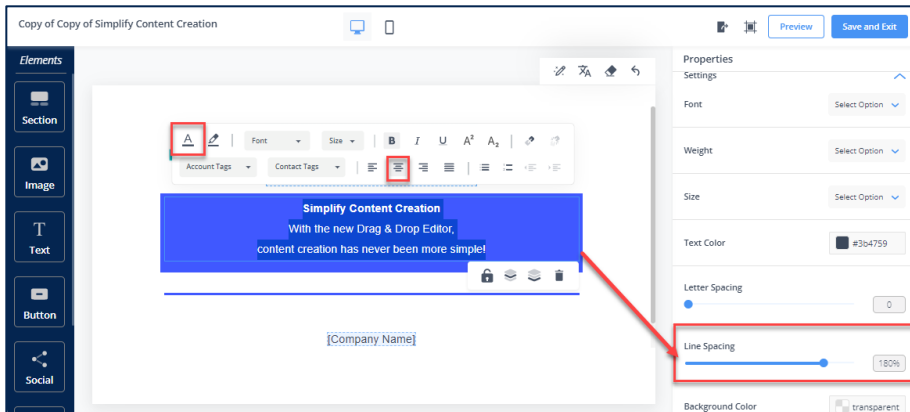
### Simplify Content Creation

With the new Drag & Drop Editor,  
content creation has never been more simple!



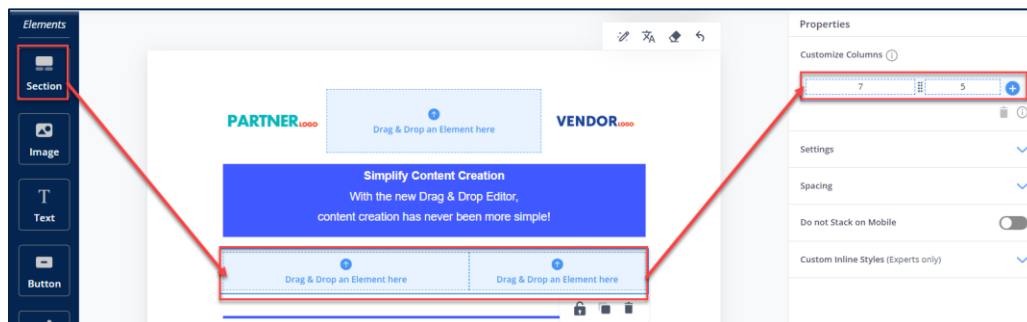


- Using the toolbar, click the **Center** icon. Then, click the **Text Color** icon and select **White**.
- From the **Properties** panel, in **Settings**, increase the line spacing to **180%**.

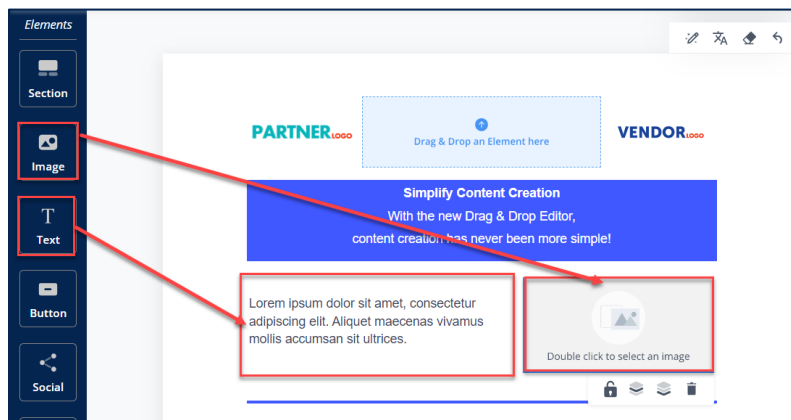


## ADD BODY CONTENT AND IMAGE

- From the **Elements** panel, drag & drop the **Section** element onto the canvas.
- From the **Properties** panel, in **Customize Columns**, click the **+** icon. Then adjust the column size to a **7:5 split**.



- Drag & drop the **Text** element into the left column, and the **Image** element into the right column.



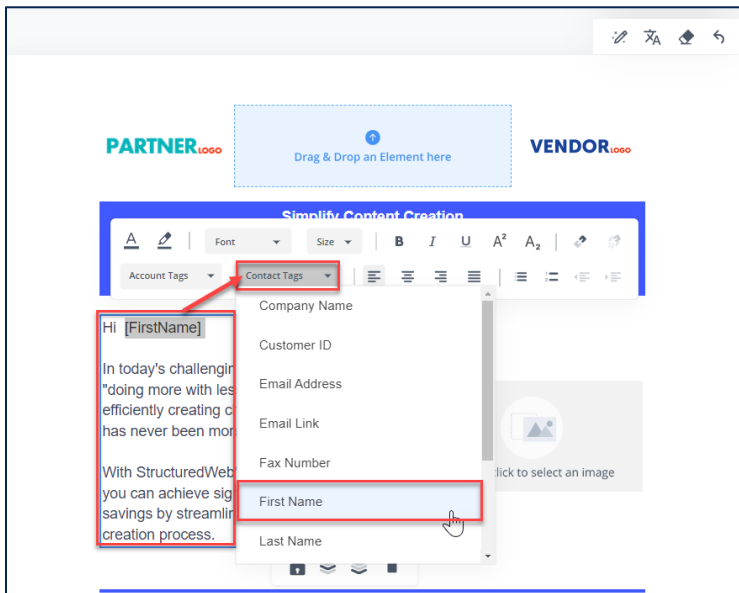
- 4 Double click **inside** the text box, then copy & paste the following content into the text box:

Hi [FirstName]

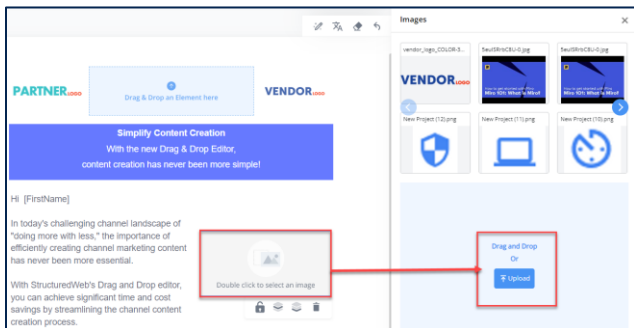
In today's challenging channel landscape of "doing more with less," the importance of efficiently creating channel marketing content has never been more essential.

With StructuredWeb's Drag and Drop editor, you can achieve significant time and cost savings by streamlining the channel content creation process.

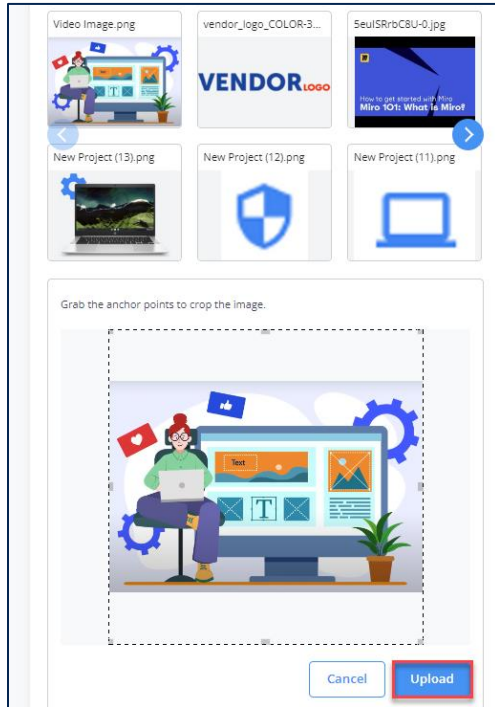
- 5 Highlight **[First Name]**. Then, from the toolbar, click the **Contact Tag** drop-down and select **First Name**.



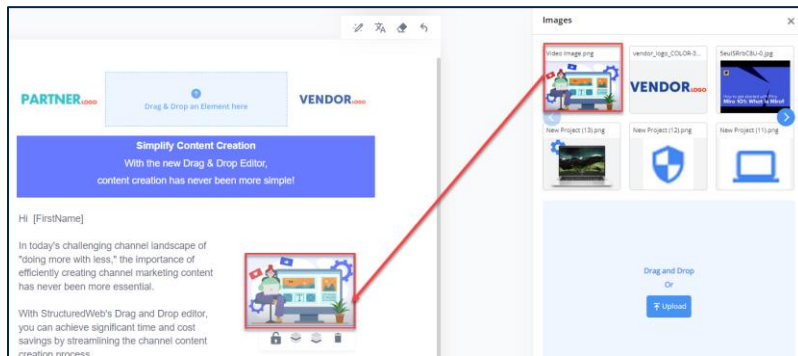
- 6 Double-click the **Image** element. Then click **Upload**.



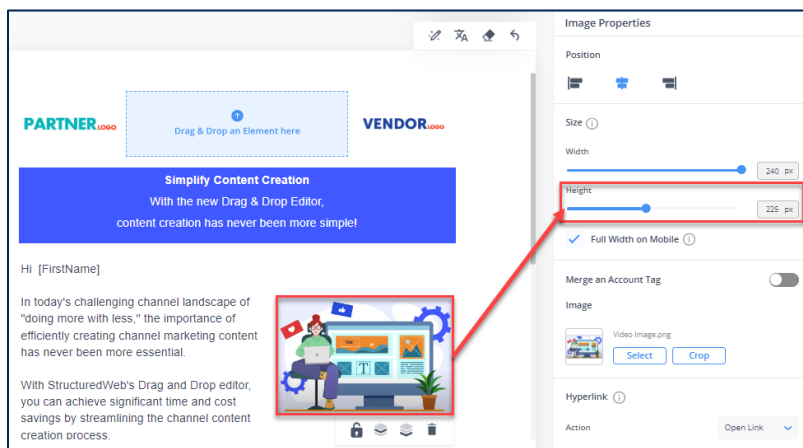
7 Select **VideoImage.png**. Then click **Upload**.



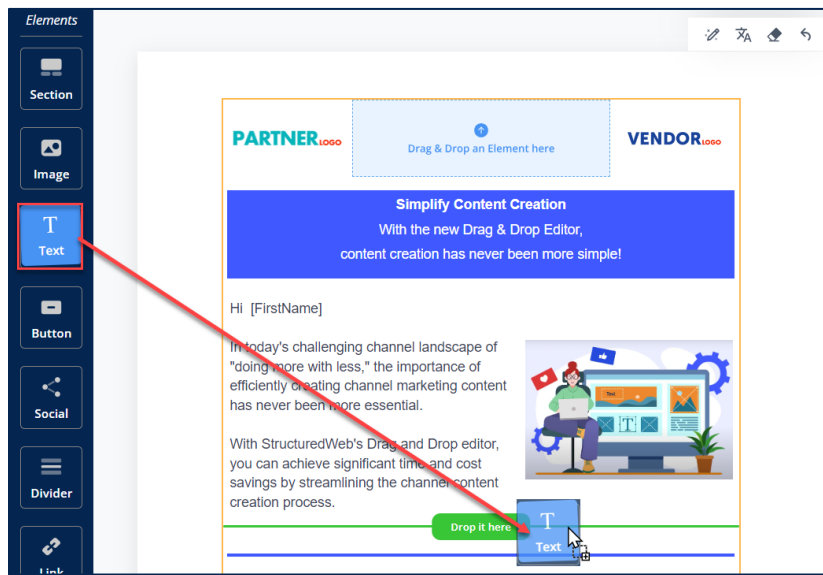
8 From the **Images** library, click the **VideoImage.png** tile.



9 On the canvas, click the **image**, then from **Image Properties**, increase the **height** to **225px**. (click the slider or type inside the box).



## 10 Drag & drop a **Text** element onto the canvas.

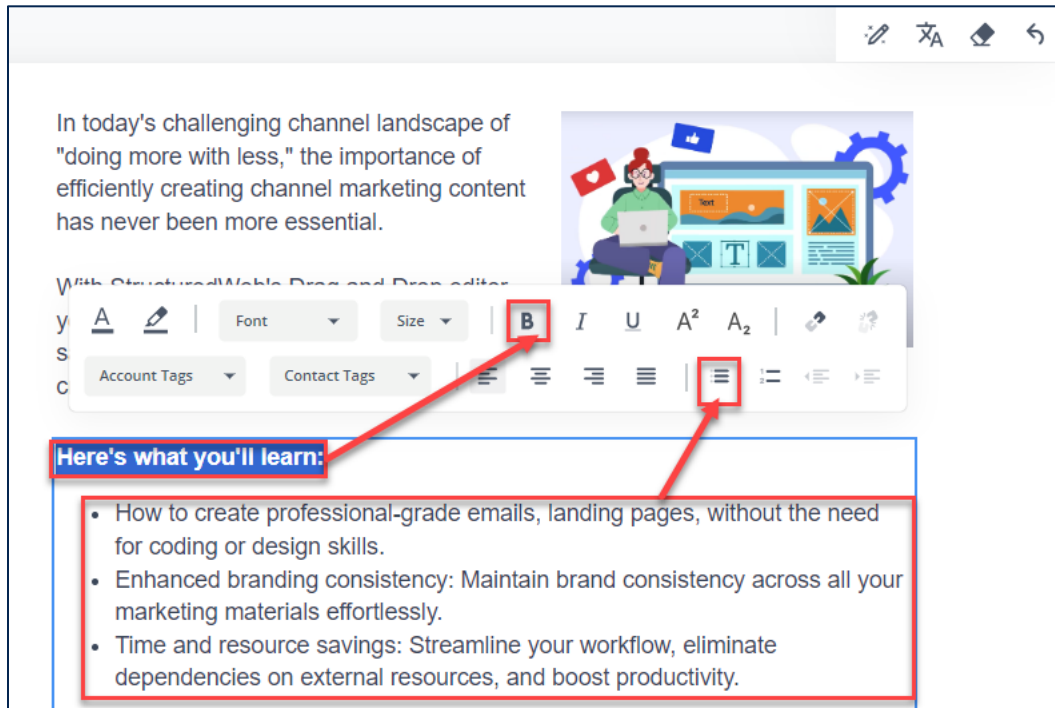


Double click inside the **text** box, then copy & paste the following content into the text box:

### Here's what you'll learn:

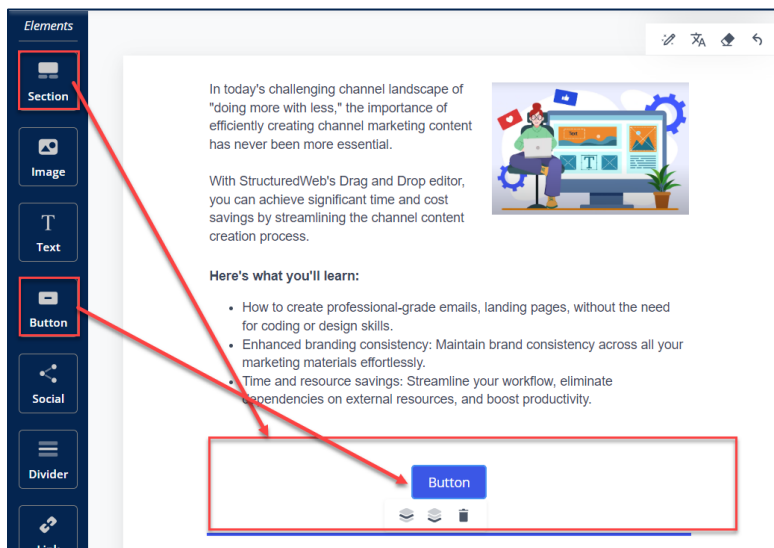
- 11
- How to create professional-grade emails, landing pages, without the need for coding or design skills.
  - Enhanced branding consistency: Maintain brand consistency across all your marketing materials effortlessly.
  - Time and resource savings: Streamline your workflow, eliminate dependencies on external resources, and boost productivity

- 12 Highlight **Here's what you'll learn**. Then, from the Toolbar, click the **Bold** icon.
- 13 Highlight the **bulleted lists**. Then from the Toolbar, click the **Bullet** icon.

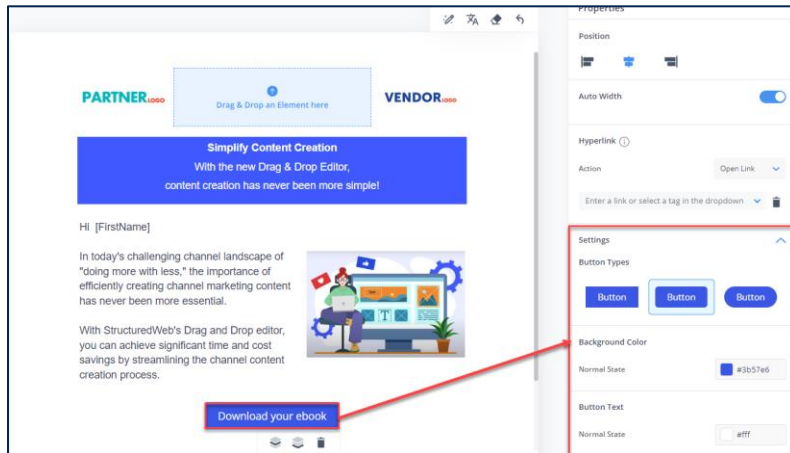


## ADD BUTTON AND ATTACH LANDING PAGE

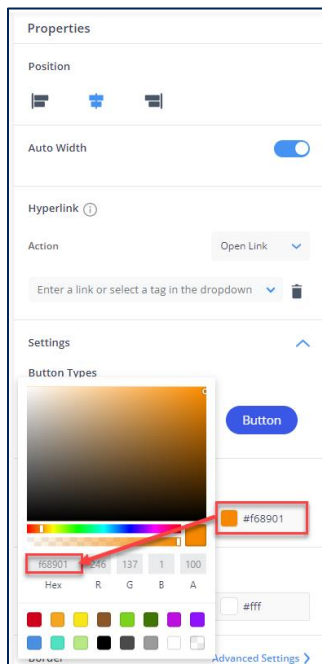
- 1 From the **Elements** panel, drag & drop the **Section** element onto the canvas. Then, drag and drop the **Button** element.



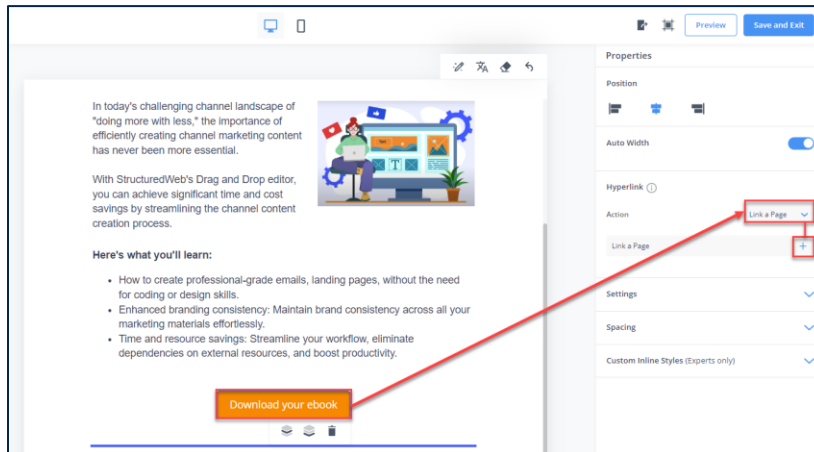
- 2 Double click the **Button**, then type: **Download your ebook**.
- 3 From **Button Properties**, click the **Setting Options**.



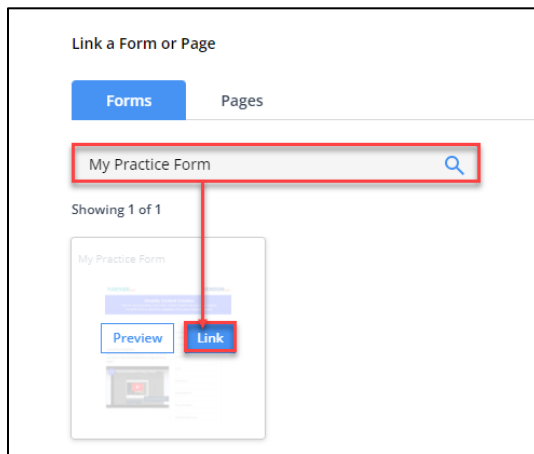
- 4 In **Background Color**, click the **Normal State** option, then in the Hex box, type **F68901**.



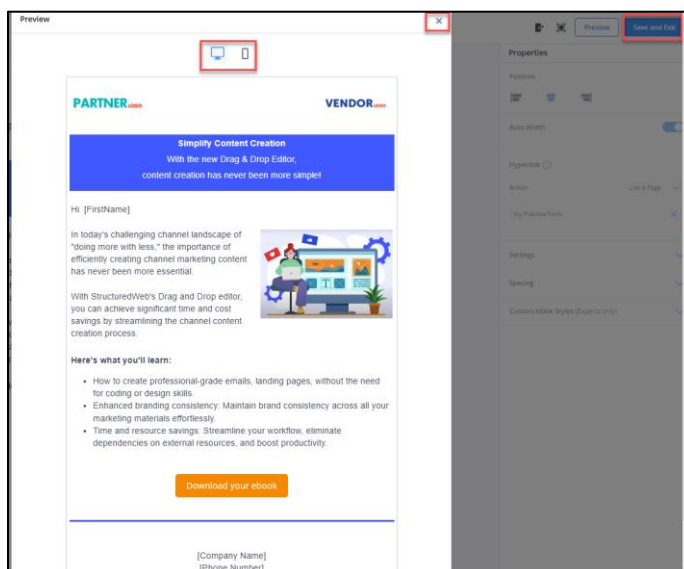
- To add a **Landing page** to the button, click the **button**, then from **Properties > Hyperlink > Action**, select **Link a Page**. Then click the **+** icon.



- In the **Search** bar, type **My Practice Form**. Then on the appropriate tile, click **Link**.



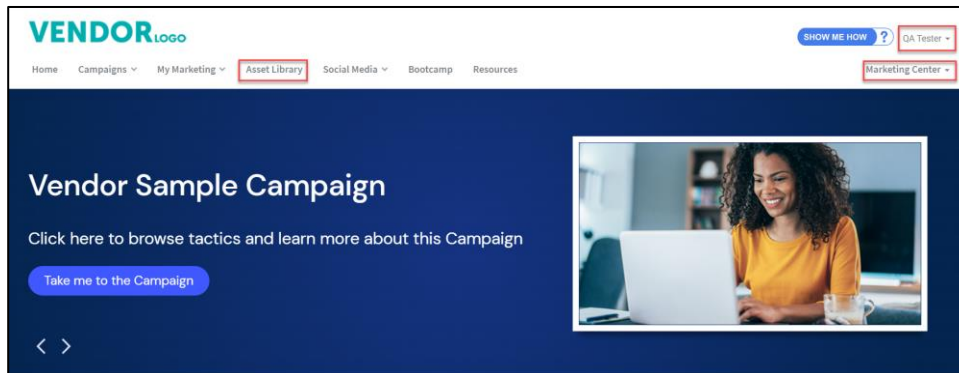
- Click **Preview** to review your email. Use the **Mobile Response** icons to preview design on different mobile devices. Click the **x** to close.



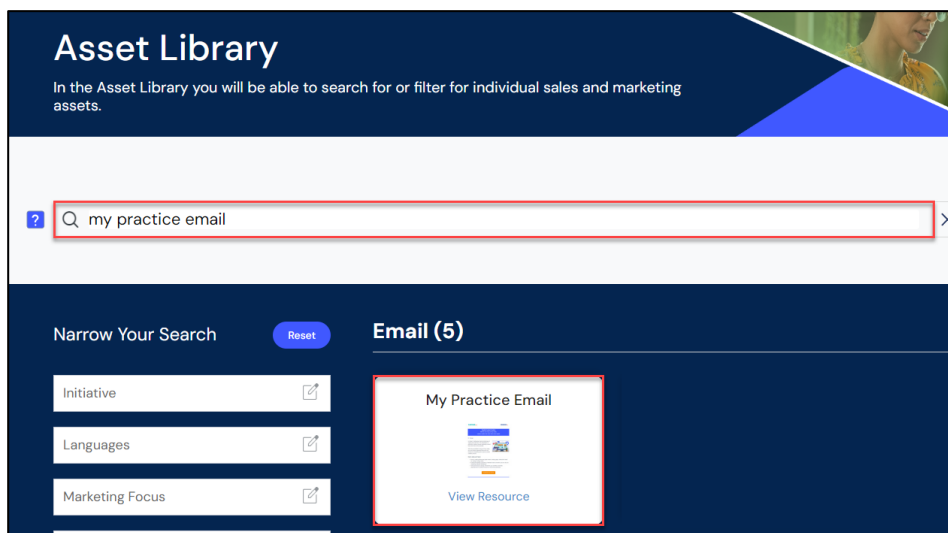
Click **Save and Exit**.

## RUN A TEST MESSAGE

- 1 Enter **Marketing Center** using a **Setup Content test account**.
- 2 From the top toolbar, select **Asset Library**.

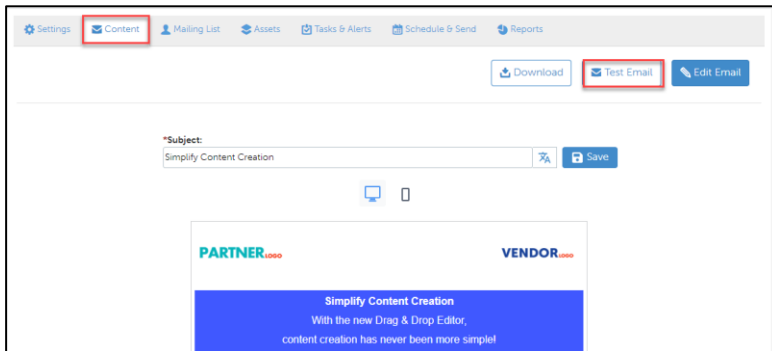


- 3 In the **Search** bar type **My Practice Email**. Then click the **appropriate tile**.

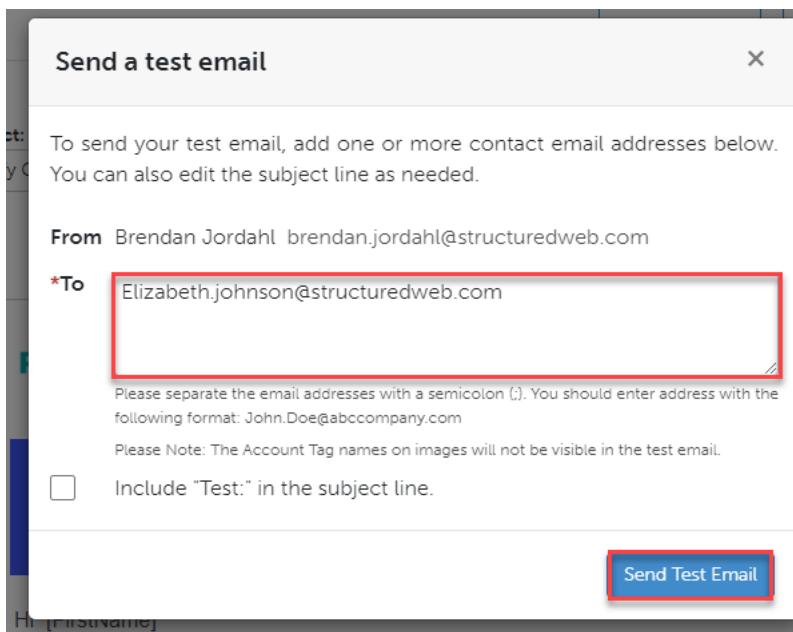




- 4 Click **Customize & send**. The email page opens.
- 5 From **Content** tab, click **Test Email**.



- 6 In the To field, elect **your email address**. Then Click Send Test Email.

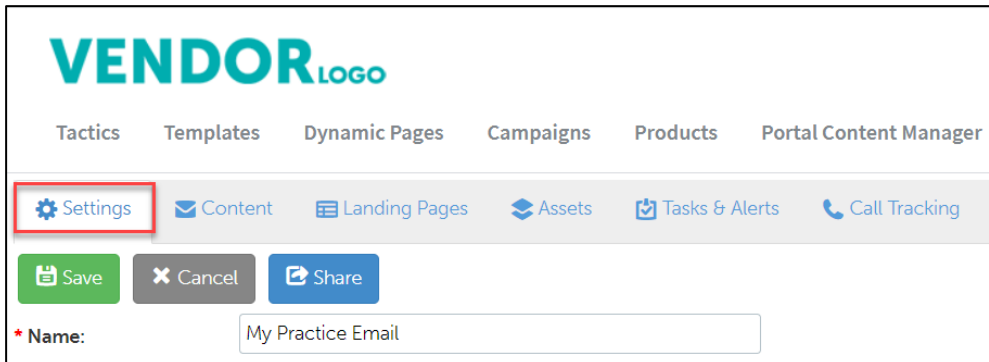


- 7 After reviewing the test message, go back to [Edit banner & Images](#) to make changes. Or move to the next step.

**PUBLISH EMAIL (THIS STEP IS FOR REFERENCE ONLY)**

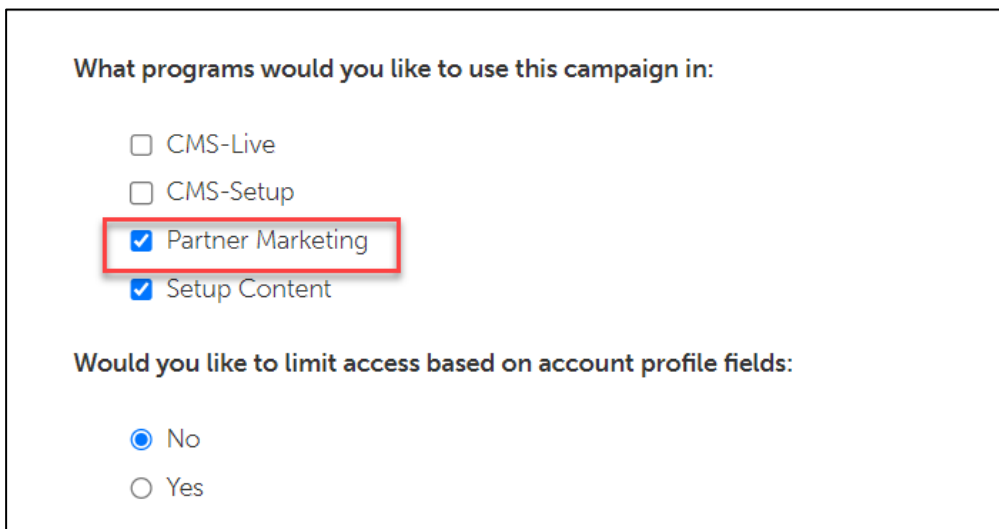
1 Return to **Content Manager > Tactic > Email > My Practice Email**.

2 From the **Email** toolbar, click **Settings**.



The screenshot shows the Vendor Logo interface. At the top, there is a navigation bar with the following items: Tactics, Templates, Dynamic Pages, Campaigns, Products, and Portal Content Manager. Below this is a toolbar with several icons: a gear icon for Settings (highlighted with a red box), an envelope icon for Content, a list icon for Landing Pages, a diamond icon for Assets, a calendar icon for Tasks & Alerts, and a phone icon for Call Tracking. Below the toolbar are three buttons: Save (green), Cancel (grey), and Share (blue). At the bottom, there is a text input field labeled '\* Name:' with the value 'My Practice Email'.

3 From **What programs would you like to use this campaign in**, select the **appropriate program**. (in most cases, this will be Partner Marketing).



The screenshot shows a form section titled 'What programs would you like to use this campaign in:'. It contains four checkboxes: CMS-Live, CMS-Setup, Partner Marketing (checked and highlighted with a red box), and Setup Content. Below this is another section titled 'Would you like to limit access based on account profile fields:' with two radio buttons: No (selected) and Yes.

4 Click **Save**.