Email Builder

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Email Template Builder

Total Expert's email builder provides a drag-and-drop experience for users to quickly create and update email templates. Users with appropriate permissions can build new email assets, modify the settings of those emails, and make them available for use by other users with appropriate permissions. Users with permission can also select existing templates and edit their setup and settings.
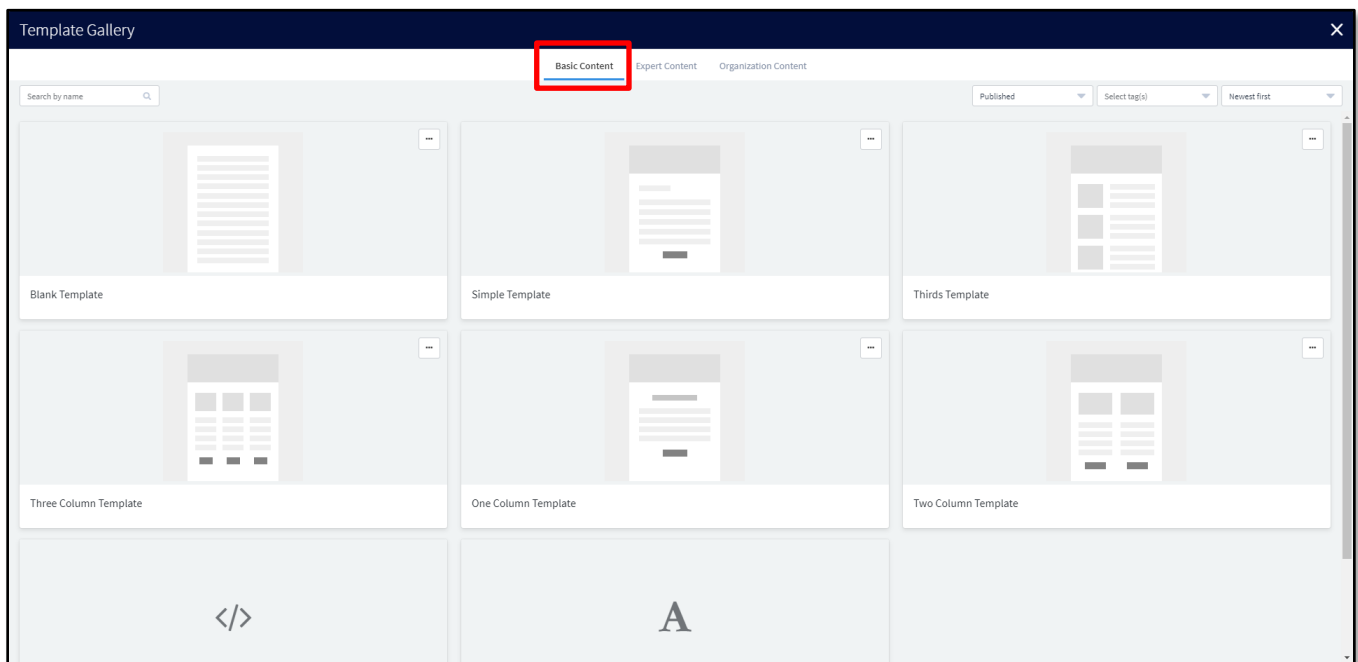
Creating a New Email Template

1. Navigate to **Email Marketing → Emails**.
2. Click the **Create Email** button at the top of the page.
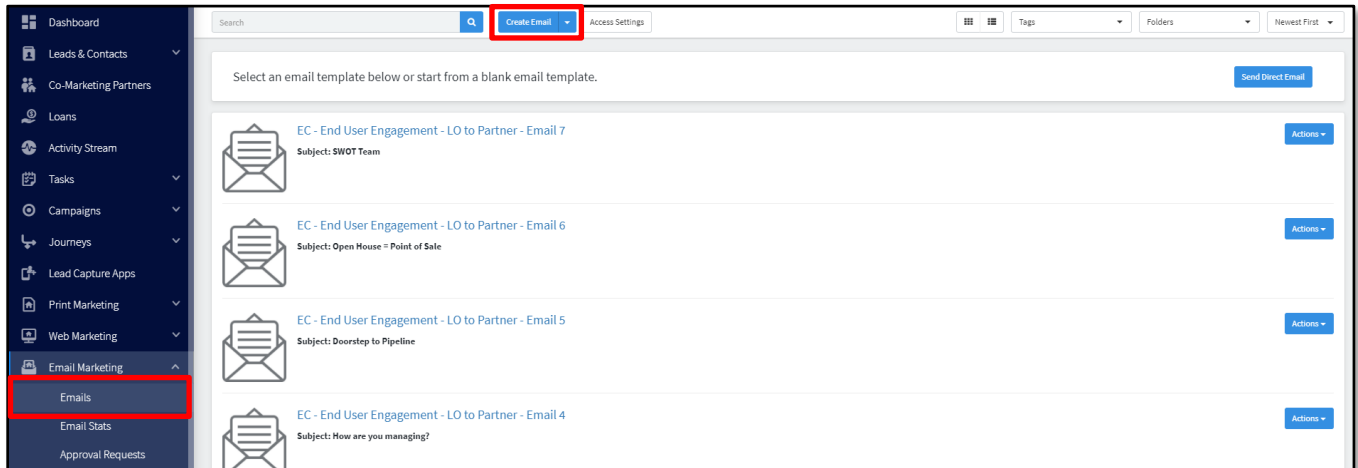

3. In the Template Gallery, click the **Basic Content** tab.

4. Hover over an option and click the **Select** button. The options when starting from scratch are:
   - **Paste in code** – Allows you to paste source code into a code editor and edit it as necessary.
   - **Simple Text** – Allows you to create a text-only template. Some basic formatting options are available.
   - **Blank Template** – Allows you to create a custom email template by dragging and dropping customizable elements and predefined content blocks into a blank template.
     i. In addition, there are some templates, such as Three Column Template, that use this formatting, but have some placeholders inserted for you. These are fully editable.

5. In the Create Email dialog box, enter a name for your template in the **Name** field.
6. Click the **Confirm and Save** button. The email builder opens. The appearance differs depending on which template type you selected.
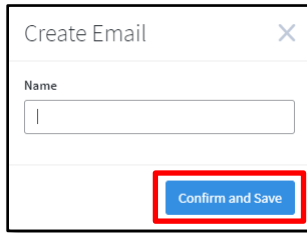

Simple Text – This mainly consists of a text editor where you can create and format the text of your email template. Options include font type, color, style, and size; paragraph style and alignment; links; optional bullets or numbering; inserting variables using Liquid code; inserting links; inserting tables; and adjusting padding surrounding the text. On the left side, there is a sidebar with various settings that can be applied to the template. Across the top of the page is a header with various action buttons: on the left, a Back button that returns you to your email list and Desktop, Tablet, and Mobile buttons to dynamically preview how the email would appear on various screen sizes. On the right, Undo, Redo, Save, Preview, Publish, and Go to Classic Email Editor, which toggles the view to the email editor style formerly used in Total Expert.
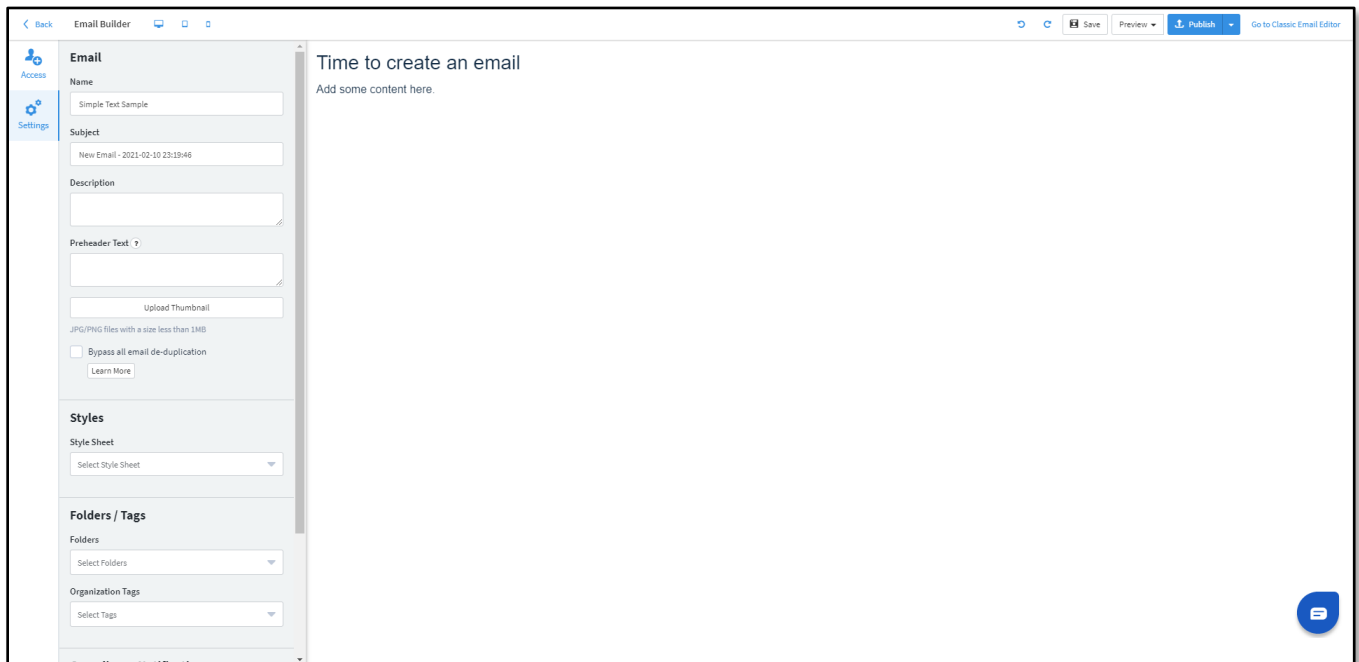
Paste in code – Initially you are presented with a pop-up box where you can type or paste code. Once you have added the code you want, click the **Update Template** button. You are then presented with a builder similar to the one for Simple Text, except that an additional button—</>Code Editor—is added to the header between the Redo and Save buttons. Click this to re-open the code editor pop-up box and make further changes to your code.
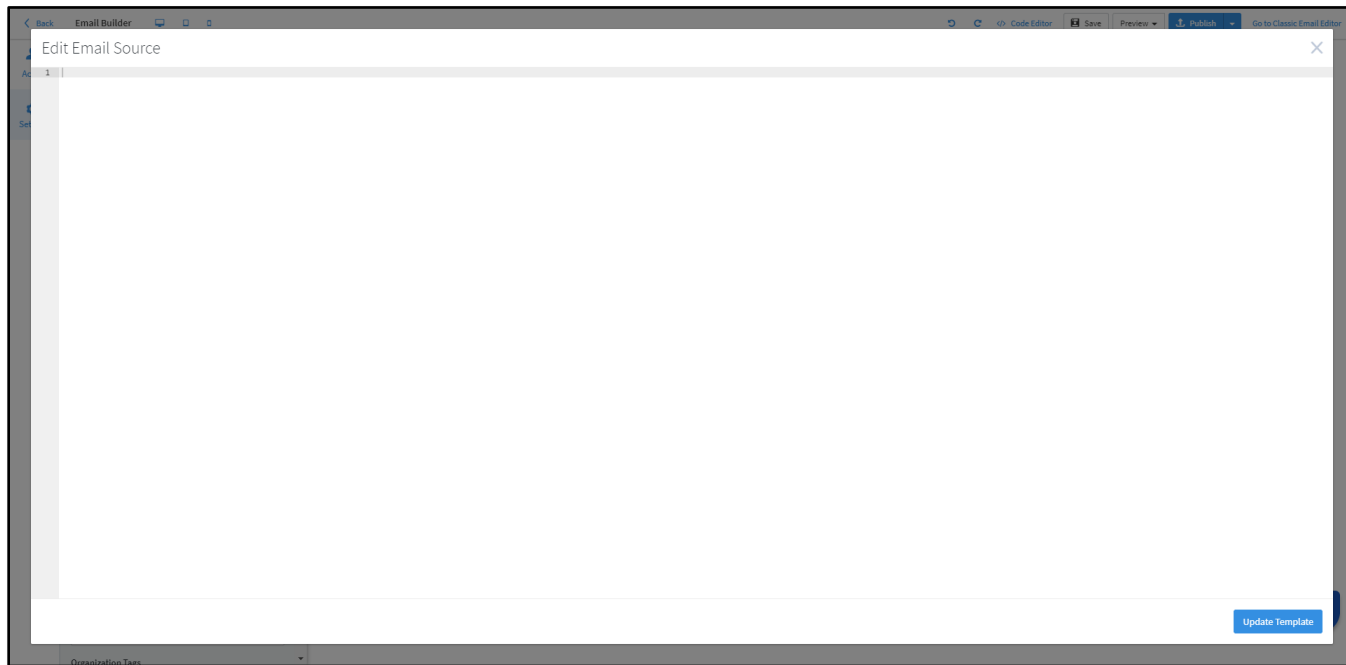
Blank – This option opens a builder similar to the one for Simple Text, with a few differences:

- The same </>Code Editor button that is in the Paste in code version is also here.
- The preview area no longer allows direct text entry. You must add layouts, elements, and blocks from the sidebar.
- The sidebar contains 2 additional tabs: Elements and Blocks. The Access and Settings tabs include the same options as the other builder types.
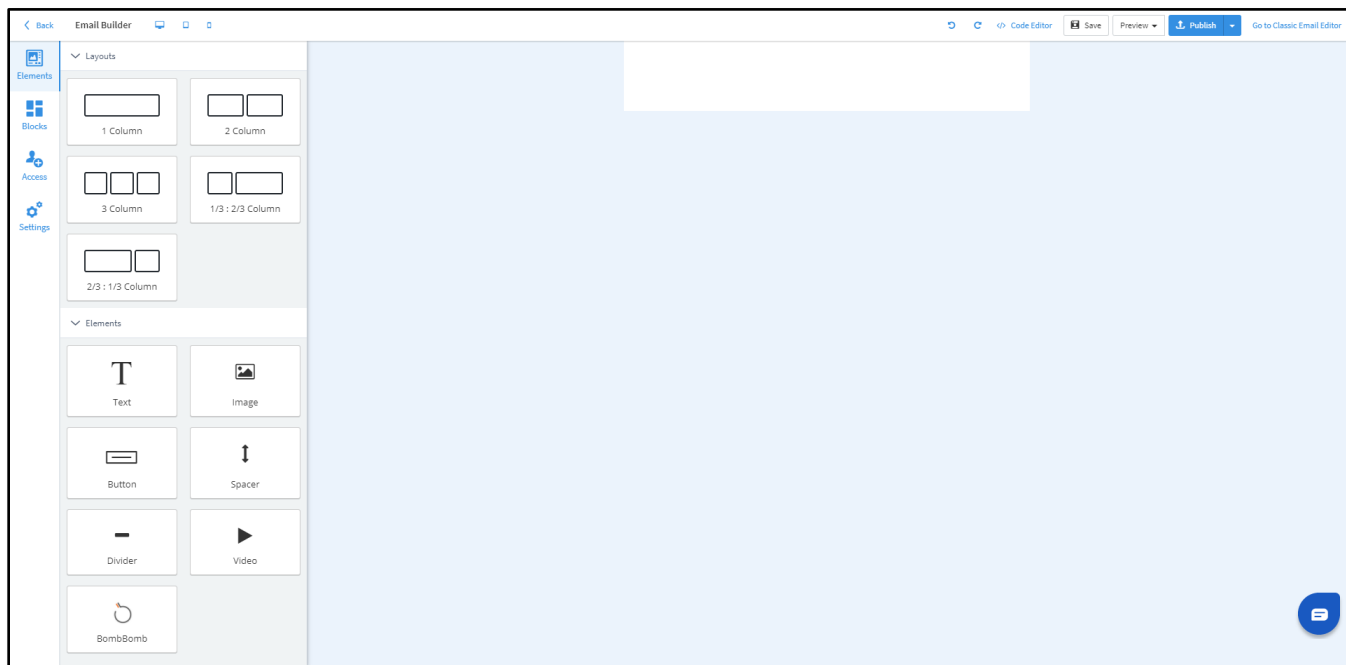
Building a Template Using the Blank Template Option

The rest of this document will focus on the drag-and-drop interface available after selecting the Blank Template option. Note that the options available in the Access and Settings tabs of the sidebar described below are the same as those in the other builder types. Also, the text editing in a Text element described below is the same as editing the text in the Simple Text builder. The buttons in the header are the same in all versions of the builder (except that Simple Text does not allow you to edit the underlying code).

Layouts and Elements

1. Click the **Elements** tab
2. From the Layouts section, click and drag a container element onto the canvas. Each container element fills an entire row of the template, but may break it into multiple placeholders filling 1 or more columns. The basic template supports up to 3 columns.
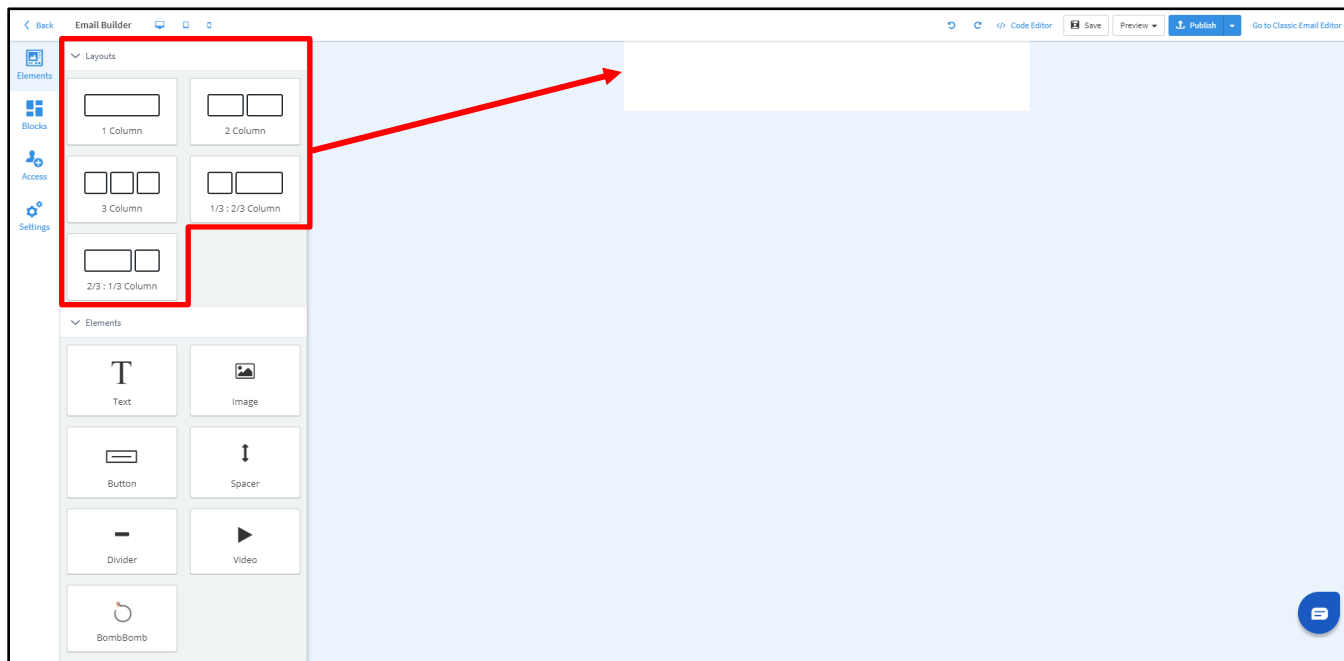
The example below shows a container with 2 placeholders: the first placeholder covers the first 2 columns, and the second placeholder covers the 3rd column.
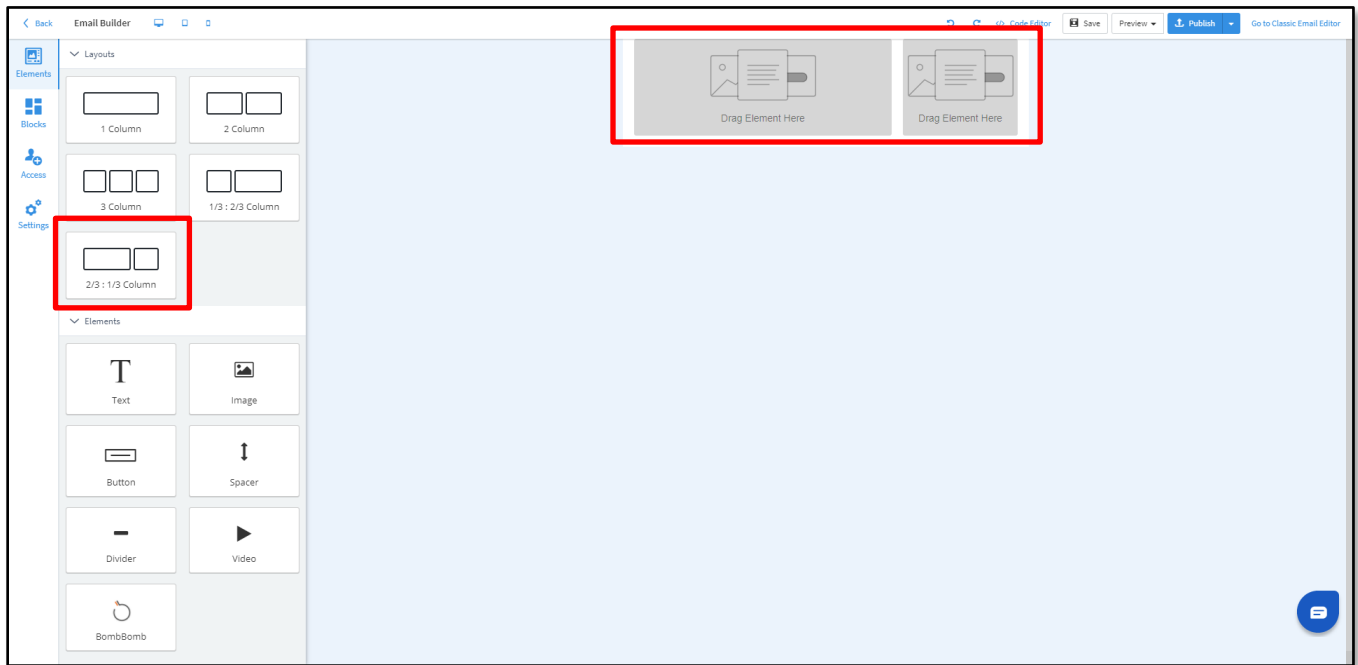
3. You can add as many container rows as you like, with any combination of columns. Each placeholder can hold 1 or more object elements:

- **Text** – Allows you to add custom text with some common formatting options.
- **Image** – Allows you to insert a selected image.
- **Button** – Creates a button element you can use to add a link to any website with custom text.
- **Spacer** – Inserts a blank space between elements within a layout placeholder or between rows spanning the entire width of the template. By default, a spacer spans 20 pixels, but you can adjust this value freely.
- **Divider** – Inserts a formattable line between elements within a layout placeholder.
- **Video** – Allows you to specify the URL for a video stored in an online location, such as YouTube. If the provided link is verified as a valid video link, a preview of the video is inserted into the email template with a link to that video.
- **BombBomb** – Allows you to insert a placeholder for a BombBomb video. You can specify a saved video or allow the user to select one when sending an email based on this template; however, the user selecting a video must have BombBomb integrated with their Total Expert account.

4. From the Elements section, click and drag an **Image** element from the sidebar into one of the placeholders in the layout you added.
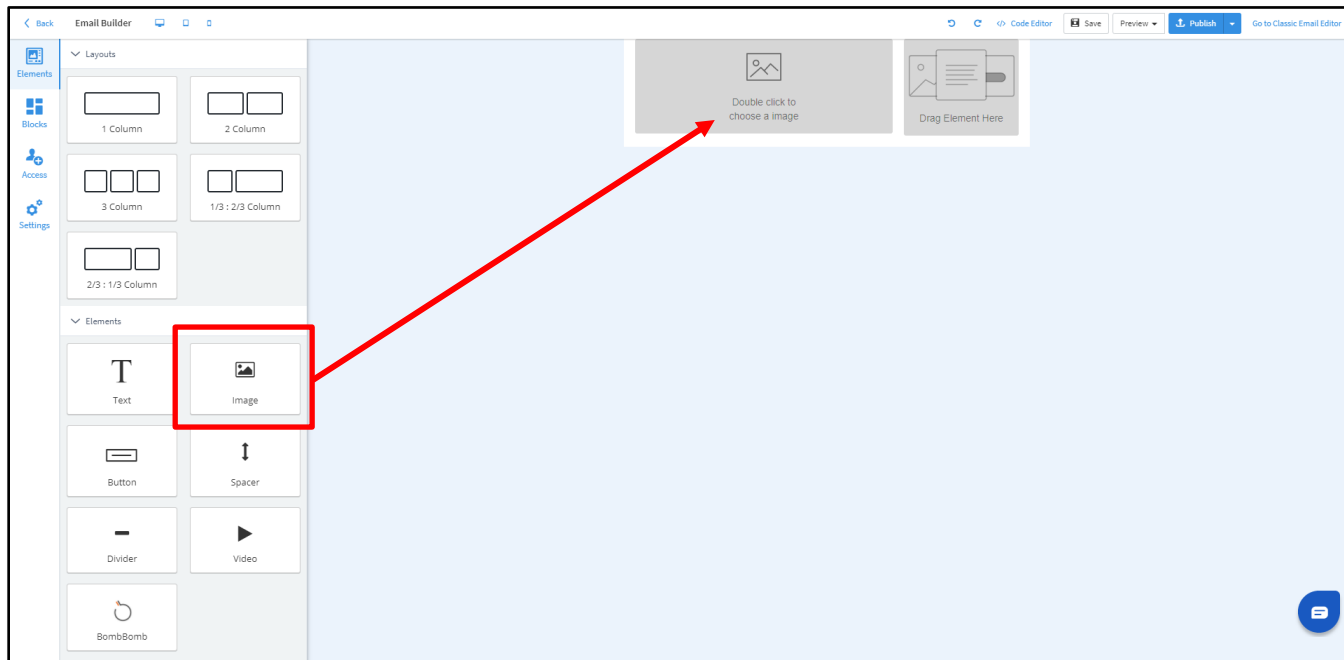
5. Double-click on the Image element. The Select an Image box appears.
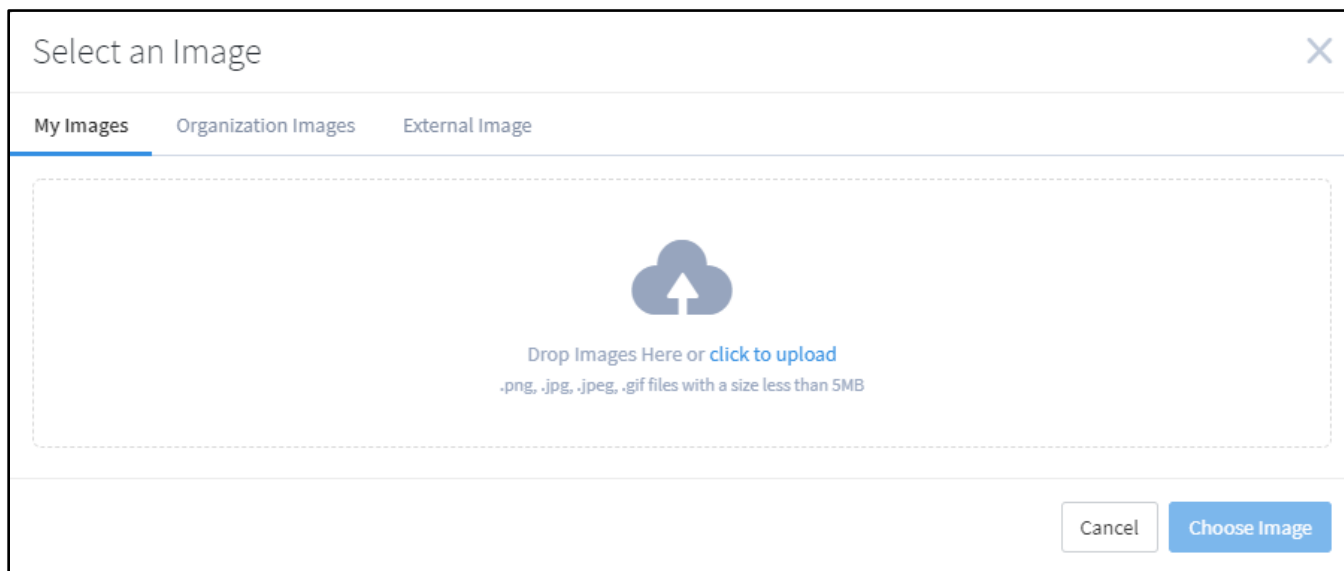
6. Select a saved image or upload a new one on the My Images tab or Organization Images tab. Or, on the External Image tab, enter the URL to an externally saved file.
7. If you uploaded an image, that image is selected by default. This is signified by a green check mark icon in the upper-left corner of the image. Ensure the image is selected, then click the **Choose Image** button.
8. The selected image is inserted into the placeholder. You can double-click the image to re-open the Select an Image box and select a different image.

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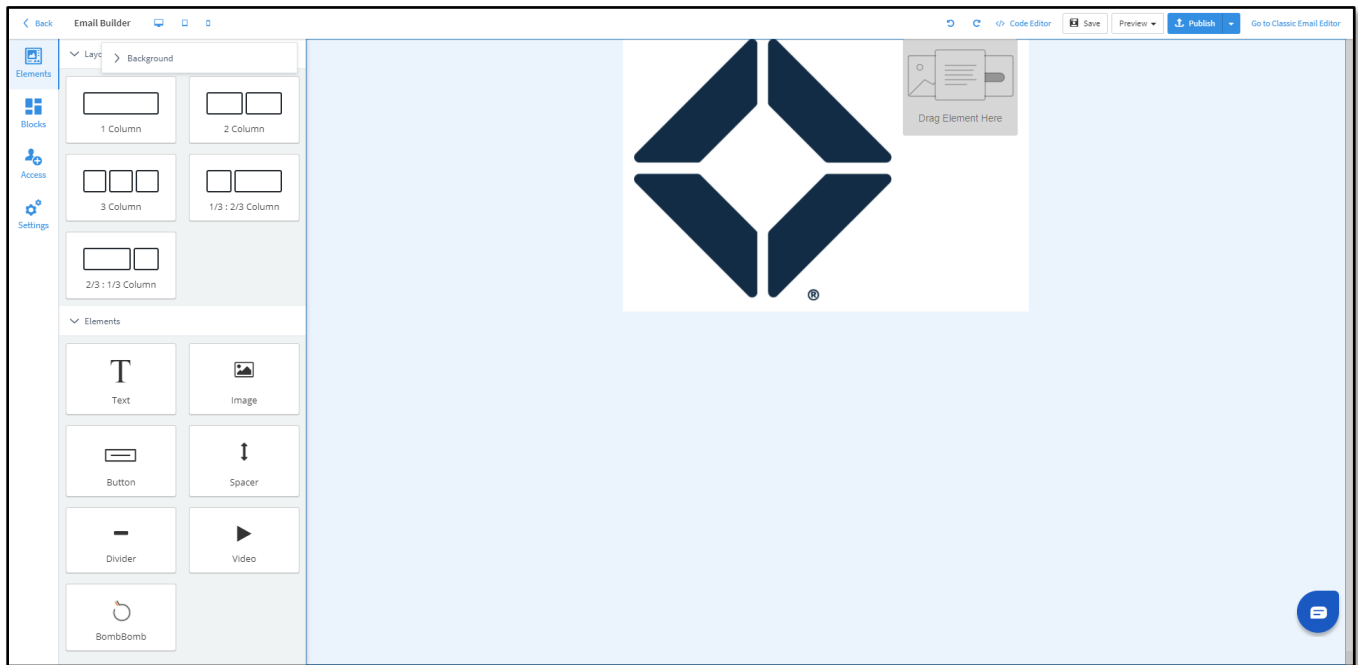
9. Click the image to open the options to the left.

- Expand the **Horizontal Position** tab. Use the Left, Center, or Right options to position the image within its placeholder.
- Expand the **Padding** tab. Enter values to set the margins around the image.
- Expand the **Dimensions** tab. Enter values for the Width or Height of the image, in pixels. The aspect ratio of the image is always maintained, so if you manually adjust one value, the other updates automatically. The width of the image cannot be made wider than the space allotted.
- Expand the **Attributes** tab. If you want a recipient to be able to click the image, select whether the image should reference a URL, an email address, or a phone number in the Link To drop-down list, then add the specific information in the Link field. In the Alt Text field, add some alternate text to facilitate recipients with screen readers or if the image fails to load for any reason.
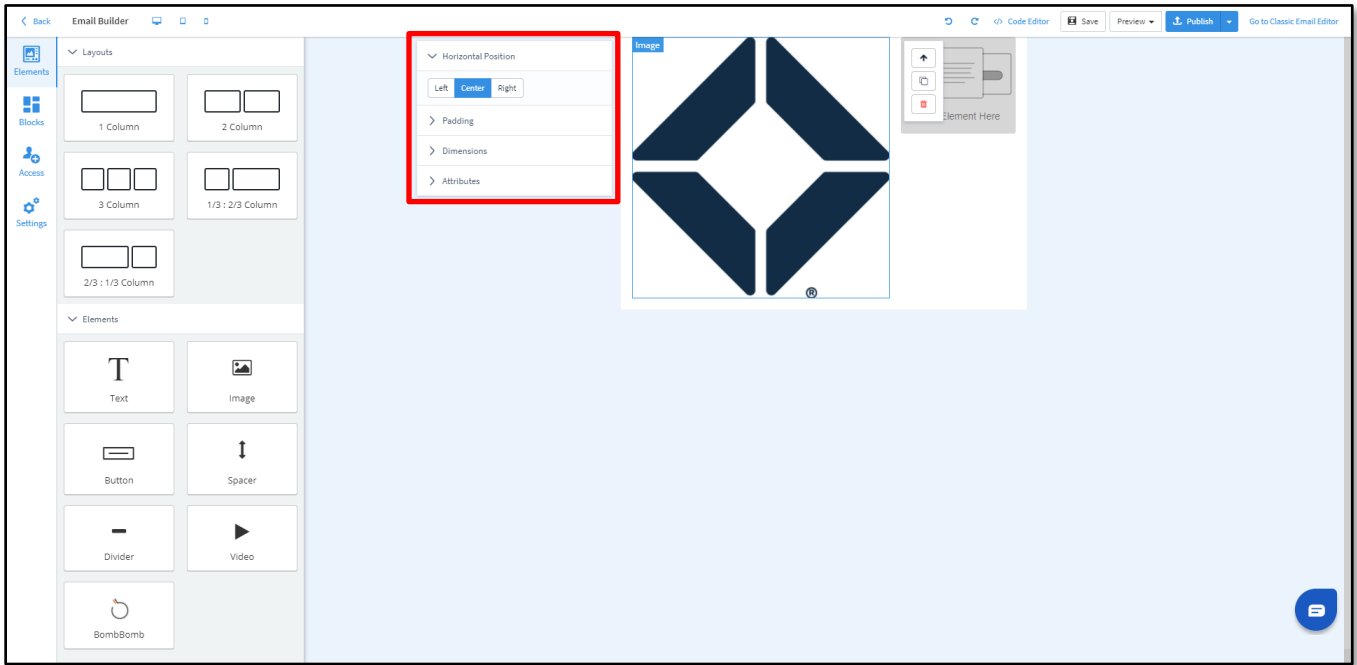
10. Drag a **Text** element from the sidebar into one of the placeholders in the container element you added. The placeholder is filled with some dummy text.

11. Double-click in the text area to remove the dummy text and replace it with your own.

- Use the formatting toolbar (below the text area) to apply any desired formatting.
- Expand the **Padding** tab (in the menu to the left of the text area) to set the margins around the text.
- Expand the **Table** tab (in the menu to the left of the text area) to insert a table as part of the text element.

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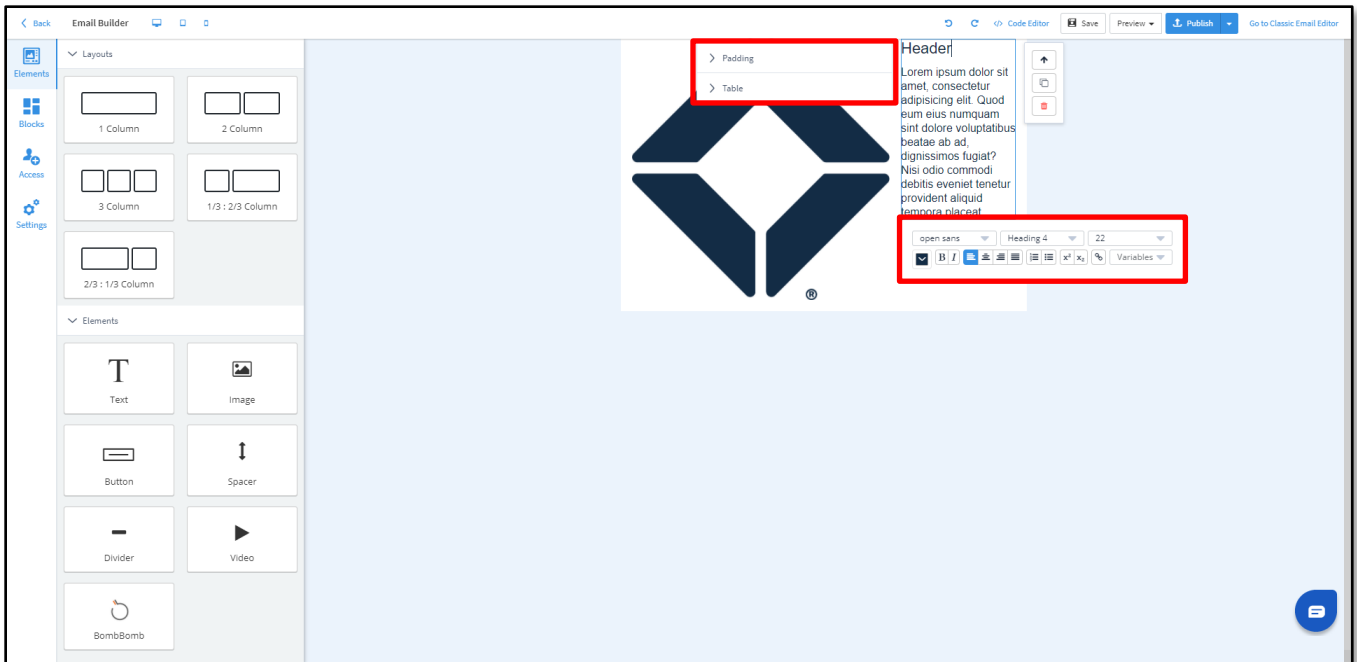
12. Add another container element in a new row below the first row. You can see where the new element will be placed by a blue line while you are dragging the element.
13. Click on an empty space in the row (not in a placeholder within the row).
14. Expand the Background tab to the left. Here, you can select a color or an image to fill the background of the row behind any elements filling the content in the row.

> **Note**
> You can modify the background of the entire template by clicking anywhere in the background and selecting options in the Background tab to the left of the editing area.

15. Add a **Button** element to a placeholder in the new row.
16. Click the Button element to activate the options.
    - Expand the **Horizontal Position** tab. Use the Left, Center, or Right options to position the button within its placeholder or check the Full Width box to expand the button to match the width of its placeholder.
    - Expand the **Color** tab. Click the color sample to open the color picker and select a color for the background of the button.
    - Expand the **Size** tab. Use the Small, Default, or Large options to modify the size of the button.
    - Expand the **Button Corner** tab. Use the Square or Radius options to define the shape of the button's corners.
17. In the associated toolbar:
    - Click the link button to open the Insert Link box. Here, you can specify the link type (URL, Email Address, or Phone Number), the location the button should link to, and the text that should appear on the button. Click the **Insert** button to apply the changes.
    - Use the toolbar to format the text label as you like. Note there are fewer options than when editing a Text element.
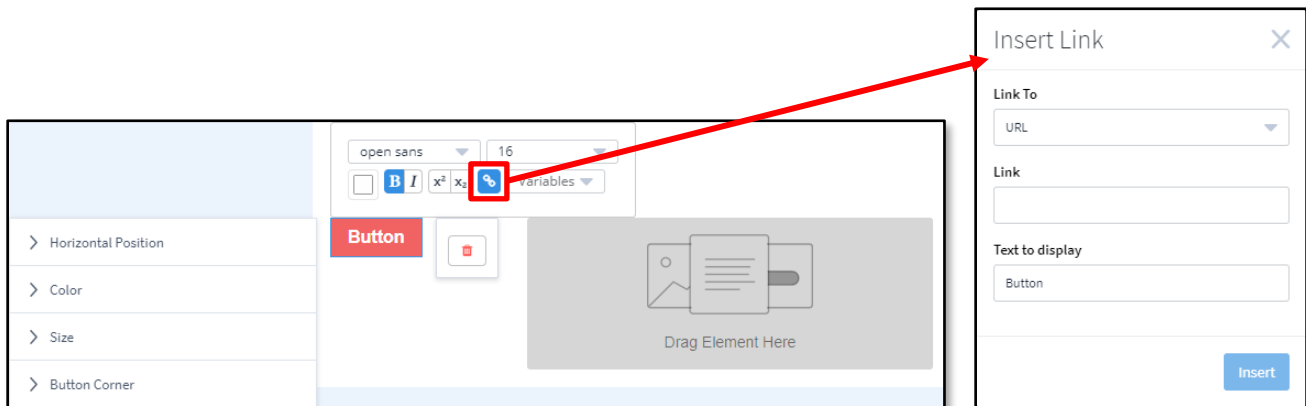
> **Tip**
> You can insert a URL or email address from the sender's profile using a dynamic variable. Select an option, such as **Sender Website** from the button's **Variables** menu. This inserts a placeholder on the button, such as `{{sender.website}}`. Open the Insert Link box and copy this placeholder to the **Link** field. The **Text to display** field can also include the placeholder if you want the address to appear to the recipient.
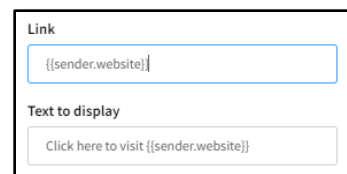
> **Note**
> You can also add a link to some or all of the text in a Text element using the corresponding button in that element's toolbar.

18. Add a **Spacer** element either between rows or between 2 elements within a placeholder. Click the element to activate the options.
    - Expand the **Background** tab. Select either a color or an image to fill the space occupied by the Spacer element.
    - Expand the **Height** tab. Enter a value, in pixels, to resize the Spacer element to your liking.
19. Add a **Divider** element between 2 elements within a placeholder. Click the element to activate the options.
    - Expand the **Line** tab. In the Weight field, enter a value, in pixels, to determine how tall the divider should be. In the Width field, enter the percentage of the available width you want the divider to span. Select an available Style option (these differences are easier to see if you increase the Weight). Use the Color picker to specify the color of the divider. The background is determined by the background of the row.
20. Add a **Video** element to a placeholder.
21. Double-click on the Video element. The Add a Video box appears. Enter the URL for a video in the **Video Link** box. If the platform validates the it as a video link, a preview appears in the box. (You can also upload a custom thumbnail image if you prefer.) Click the **Add Video** button to insert the video link into the email template. (If the URL cannot be validated as a video link, an error message appears at the top of the page, and you will not be able to save the video until you upload an image to serve as the video's thumbnail.)
    - A preview image from the video (or the custom image you selected) is added to the template. A recipient of the message who clicks on the preview image will be routed to the provided URL.
    - Once a preview is displayed, you can select how the play button is shown over it. In the Icon section, select either **White**, **Black**, or **None**, depending on what looks best with the preview image.
    - In the **Alt Text** field, enter some alternate text that can be shown in place of the preview in case the image cannot be shown for any reason.
22. Add a **BombBomb** element to a placeholder.
23. Double-click on the BombBomb element. The Select A Video box appears. If you have a BombBomb account integrated, you can select an existing video or click the **Record New Video** button to create a new one. Otherwise, you can leave the element empty and leave it to each user to select a video when they send an email using this template.
24. Add an **Experience** element to a placeholder.
25. Double-click on the Experience element. The Experience Settings slide-out panel appears. In this panel:
    - Select a saved Jebbit experience from the **Select Experience** list.
    - Format a button (using the same options as the Button element described above).
    - Click the **Save** button to apply your selections

    The button created in the element will link to the selected survey experience, including a unique contact ID for each recipient of the email, allowing you to trace the results of the survey back to individual contacts in Total Expert.
26. Add a **Vidyard** element to a placeholder.
27. Double-click on the Vidyard element. The Add a Vidyard Video box appears. Here, you can sign in to a Vidyard account (or create a new one) where you can record a new video or select an existing one to insert into the placeholder in the email template. Vidyard also allows you to select multiple videos to insert as a

unit into the placeholder. Otherwise, you can leave the element empty and leave it to each user to select a video when they send an email using this template.

Tip
As you are building your template, click the **Desktop**, **Tablet**, and **Mobile** buttons in the header row. These will reshape the canvas to show you how the current layout will change responsively depending on the type of device a recipient views the email.
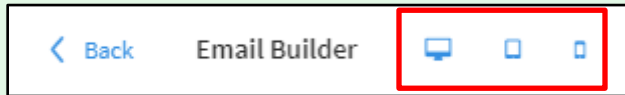

You must be in Desktop mode to be able to modify options for any elements; however, you can still format text.

Element Options

You can click on any element to select it and see related options. (You can then clear the current selection by clicking anywhere in the empty space surrounding the canvas.)

- For the Image and Text elements, there are 3 options:
    - Click the **Select parent row** (up arrow) button to change the current selection to the row element that includes the selected element. This allows you to change settings on a row when you unable to click on that row because elements fill the entire row.
    - Click the **Clone element** button to create an exact duplicate of the element immediately below the selected element inside the same placeholder.
    - Click the **Delete element** (trash can icon) button to delete the element (but not the placeholder it occupies).

- For the Button, Divider, Video, and BombBomb elements, the only option is Delete element.
- The Spacer element has only the Clone element and Delete element options.
- A container row has 3 options:
    - Click the **Clone element** button to create an exact duplicate of the row immediately below the selected row, including any content and formatting.
    - Click the **Delete element** (trash can icon) button to delete the entire row, including any content.
    - Click the **Save block** button to open the Save block to organization pop-up box where you can save all the elements in the row, including formatting, as a *block* that you can use again elsewhere. Here, enter a name and description for the block and select a Type to associate with the block. See Blocks below.
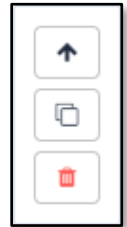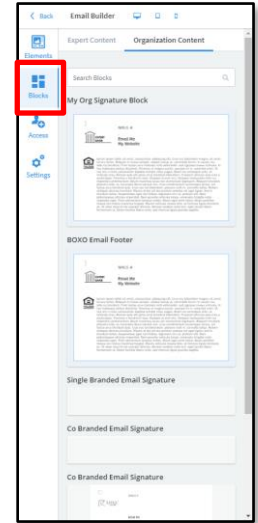
Blocks

A block is a saved set of elements that you can use in multiple email templates, such as a standard footer. A block may consist of standard brand formatting, disclaimers, links, contact information, and so on.

A block consists of an entire row of content, so you do *not* need to add a layout to hold one in your email template.

1. Click the **Blocks** tab at the far left of the sidebar.
2. Enter text in the **Search Blocks** field to locate a block by its name or simply scroll through the list to find the block you want.
3. Click and drag the block from the list into the email template the same way you would a container element. You can see where the block will be placed by a blue line while you are dragging it.

Some blocks contain code to display a disclaimer. By default, this calls the organization's standard email disclaimer. You can add additional saved disclaimers or replace the standard disclaimer. Click the block, and click the **Update Disclaimers** button in the menu on the left side.
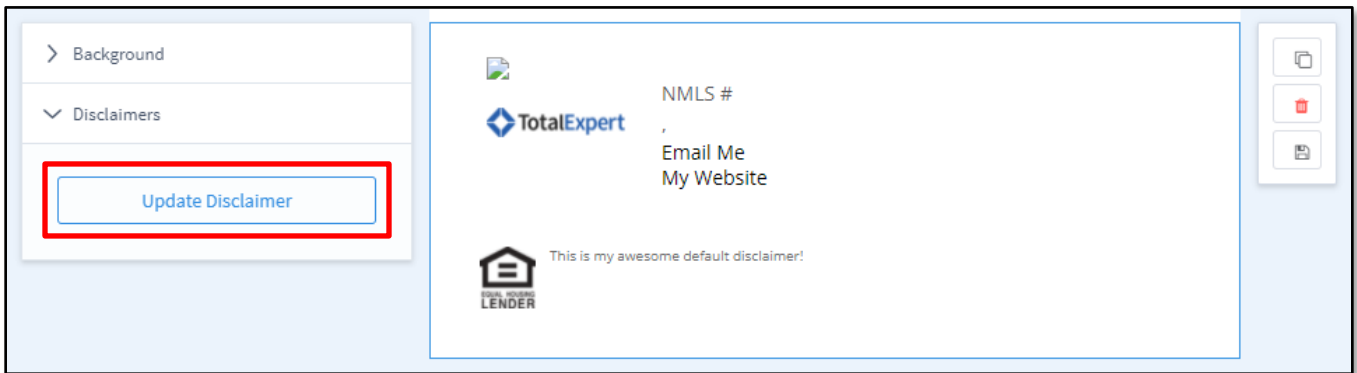
Select the desired disclaimer(s) in the Update Disclaimer box. Check the **Replace Disclaimer** box to use the selected in place of the standard disclaimer, or leave it unchecked to append the selected to the standard. Click the Update Disclaimer button at the bottom of the box to confirm the changes.
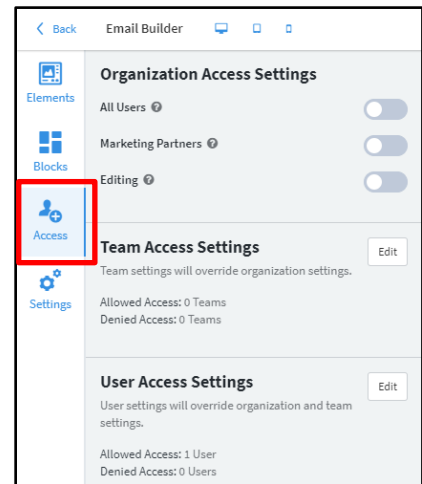
Access

The options available in the **Access** tab of the sidebar are the same, regardless of which layout option you selected initially. If you are working with a Blank Template layout, the Access and Settings tabs are below the Elements and Blocks tabs; if you are working with a Paste in code or Simple Text layout, Access and Settings are the only tabs.

> **Tip**
> Wait until you are finished editing the template before assigning access settings. If you assign access while you are still setting up the template and save it, users with access will see the draft in their libraries. Once you are satisfied with the template, assign access using these options (being sure to save afterward).

You can assign access at the organization, team, and user levels. By default, organization settings are turned off, while team and user settings are neither allowed nor denied. Team settings take precedence over organization settings, while user settings take precedence over both. If the email template is neither allowed nor denied to a given user, then their team settings apply. If the user's teams are also neither allowed nor denied, then the organization setting applies.

For example, if access is denied to the whole organization and a user's teams, but that user is allowed access at the user level, then that user has access because the user access setting takes priority. Likewise, if either the organization or a user's teams have access, but that user is denied access, then that user will not have access.

Organization Access Settings

These settings apply to all users in your organization. They are all turned off by default.

- Click the **All Users** toggle switch to make the template available to every user in your organization.
- Click the **Marketing Partners** toggle switch to make the template available to co-marketing partners of every user in your organization who has access to the template. If a user in your organization does not have access to the template, none of that user's co-marketing partners will have access, even if this is checked.
- Click the **Editing** toggle switch to allow users with access to the template to be able to edit the body and subject line of the email before sending. If this is not checked, users with access to the template will only be able to select the recipients of the message and the time and date they want to send it.

Team Access Settings

To give access to the email template to all the members of a team:

1. Click the **Edit** button in the Team Access Settings section. The Team Settings box opens.
2. Check the boxes for any teams you want to have access to the email template.
3. Click the **Change Settings** button at the top of the page.
4. In the slide-out panel, select the **Add Access** option.
5. (optional) Check the **Allow Co-Marketer Access** box to allow co-marketers of members of the selected teams to have access to the template.

6. (optional) Check the **Allow editing when used as a template.** box to allow members of the selected teams to be able to edit the body and subject line of the email before sending.
7. (optional) Select an option from the **Approval Flow** drop-down list to require members of the selected teams to submit any edits for approval before their version of the email can be sent.
8. Click the **Submit** button at the top of the panel.
9. Click the **X** in the upper-right corner of the Team Settings box to close it.

To deny access to a team, follow the same steps, but select the **Deny Access** option in step 4. To reset a team's access setting (so it is neither allowed nor denied access), select the **Clear Access** option in step 4.

User Access Settings

The steps for adding, denying, and clearing access at the user level are exactly the same as at the team level, except you begin by clicking the **Edit** button in the User Access Settings section. The user who created the email template is allowed access by default.

Settings

The options available in the **Settings** tab of the sidebar are the same, regardless of which layout option you selected initially. If you are working with a Blank Template layout, the Access and Settings tabs are below the Elements and Blocks tabs; if you are working with a Paste in code or Simple Text layout, Access and Settings are the only tabs.
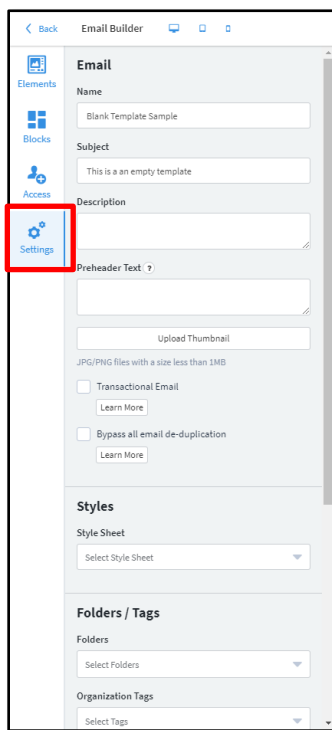
The message "How can I use the Drag & Drop Editor?" appears at the top of this section if a Paste in code layout is not consistent with the Foundation framework. Click the **Learn More** button for more information.

Email

- The **Name** field shows the name you entered when you created the template. You can change the name here.
- In the **Subject** field, enter the subject line that should be applied by default to any emails sent using this template. When this template is used, the user may be able to change the subject line their recipients will see in their inboxes. You cannot save an email template without entering anything in this field.
- In the **Description** field, enter any text that will help users locate and understand this email in their library. Anything in this field will be visible with the listing and searchable by the end user but will not be included with the email sent to recipients.
- In the **Preheader Text** field, enter some text that will be shown to recipients along with the subject line before they open the email. This need not include anything in the body of the email. Be aware, however, that not all email clients support preheader text.
- Click the **Upload Thumbnail** button and select an image file to upload. This image will be shown to your users with the listing in the email library.
- Check the **Transactional Email** box to indicate that the template is for transactional emails. A *transactional* email is one that is considered important messaging for a customer transaction or account. This designation gives any email based on the template priority over marketing emails and ensures it is sent, even when the customer has unsubscribed from marketing emails.

Warning
Because a transactional email is sent even to contacts who have unsubscribed from marketing emails, this should only be checked for an email template that contains important information about the recipient's loan or account.

- Check the **Bypass all email de-duplication** box 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 and would be turned off again before making the template available to end users.

Styles

Select an option from the **Style Sheet** drop-down list to apply a saved batch of CSS code to the email template. See Style Sheets below for more information on creating and saving style sheets.

Folders / Tags

- Click the **Folders** field and select one or more pre-defined folders to be applied to the email template.
- Click the **Organization Tags** field and select one or more pre-defined tags to be applied to the email template.

You can remove a folder or tag from the template by clicking the small **x** next to its name.

Folders and tags applied to email templates are not visible in the list or grid views of the library, but users can filter their library view via the drop-down menus at the top of the screen.

Tip
Use folders to designate broad categories, such as *Holidays*. Use tags to indicate more specific topics, such as *Halloween* or *Independence Day*.

Compliance Notifications

Both of the following settings must be defined for the threshold notification to work.

- Enter a value in the **Compliance Notification Threshold** field. This value 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). If a user selects exactly this number of recipients, the emails will send without triggering a notification. If you enter 0, no limit is applied and no notifications will ever be sent.
- Click the **Compliance Notification Recipient(s)** field and select one or more users in your organization to receive a notification when a user sends emails using this template to more recipients than the threshold value defined above.

Landing Page

Select an active dynamic website saved in the platform. When you create the body of the email, include one of the dynamic websites placeholders, which will populate from the website selected here.

Style Sheets

You can save a standard batch of CSS (cascading style sheets) code to apply to any email template. These are created outside the email builder, but can be selected to apply using the Style Sheet option in the Settings tab.

To create a style sheet:

1. Navigate to **Manage Marketing → Style Sheets**.
2. Click the **Add Style Sheet** button in the upper-left corner of the page and select **From Builder** from the drop-down list.
3. In the Style Sheet Builder:
    a. Enter an identifiable **Name** for the sheet. This is what you will see in the email builder settings.
    b. Select color, font, and size options for the various options on the sidebar on the left side of the page. Your selections are reflected by the preview elements on the right.
    c. Click the **Save** button in the lower-right corner.
4. The list updates with your new sheet. To make your new sheet the default sheet for your organization, select **Actions → Set as Default**. The default will be applied each time a new email is created by anyone in your organization; however you can select another available style sheet in the settings as outlined above.

For more complete details on creating and maintaining style sheets, see *Style Sheet Builder for Email Builder*.

Saving, Previewing, and Publishing

Saving

Click the **Save** button in the upper-right corner of the email builder to retain any changes to your template; if you navigate away from the page without saving, your changes will be lost, so save often. This is independent from and does not change the published state of the email template.

Basic Previewing

Select **Preview → Enter preview mode**.
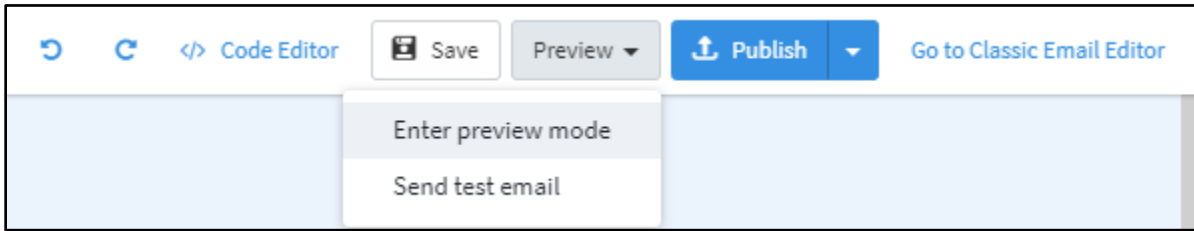
This opens a full-screen Preview & Test view with some options on how to preview the email template. The Basic Preview tab on the left is selected by default. In this view, the main panel shows a full preview of how the email will be displayed to the recipient, including filling in Liquid tags. Tags referring to the sender or recipient of the email or the recipient's loan information are left unfilled initially. To fill these with test data:

1. In the Basic Preview tab, click the **Set Test Variables** button in the upper-right corner. The Set Test Variables box opens.
2. In the Set Test Variables box:
   a. Select a user in the **Sender** field.
   b. Select 1 of that user's contacts in the **Recipient** field.
   c. Once you select a recipient, you can select a **Product category** and a specific **Product** to populate any loan tags with that contact's specific loan information.
   d. Click the **Save Test Variables** button.

The preview updates with relevant information.
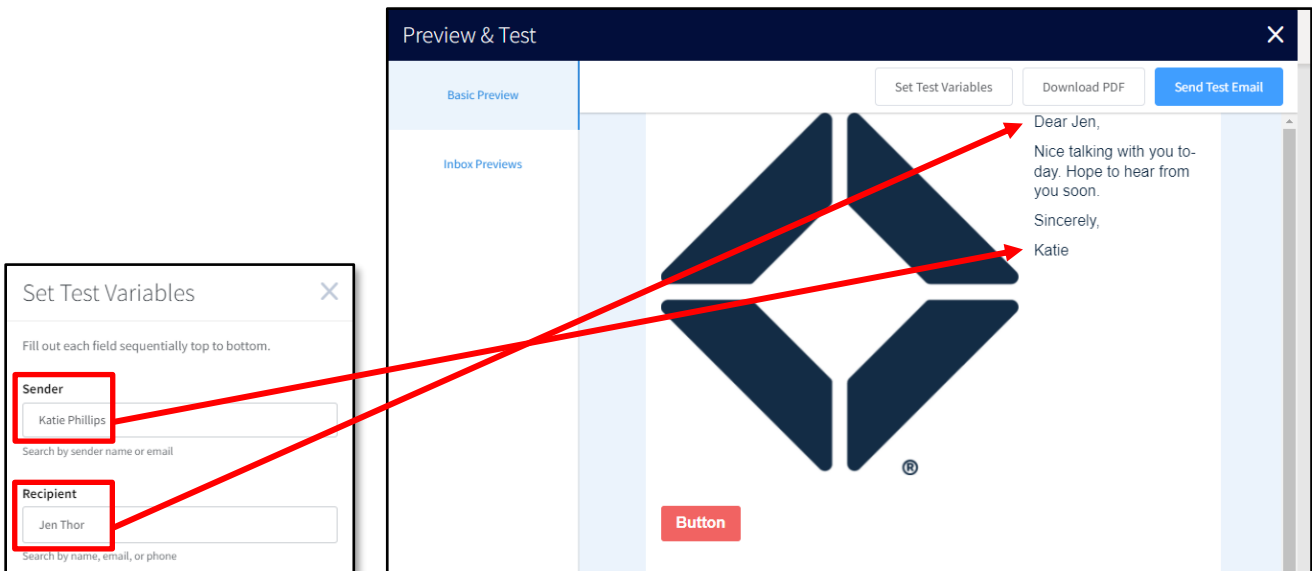
Note

If you select yourself as the sender, you can see any of your contacts as recipients. If you select another user, you can only select contacts that have been shared with or assigned to you by that user. This prevents you from seeing unauthorized personal information.

Click the **Download PDF** button in the upper-right corner to save a copy of the preview, including the populated placeholders.

Click the **Send Test Email** button in the upper-right corner to have a copy of the email sent to up to 10 email addresses. In the Send Email Preview box, the email address in your Total Expert account is added by default, but you can remove this and/or add other addresses. Click the **Send Preview** button in the box to trigger sending the preview.

Inbox Previewing

From the editing page for the email template, select **Preview → Enter preview mode**.

In the Preview & Test view, click the **Inbox Previews** tab on the left side. This presents a gallery of thumbnail images of the email template as it would be rendered in various configurations of browser, client, OS, and screen type. Desktop configurations are shown at the top with mobile device configurations below.

Click any thumbnail to see a full-size preview of that configuration. You can step forward and back through the full-size images by clicking the arrow buttons on the sides of the main panel. Click the large **X** in the upper-left corner of the panel to return to the gallery.

> **Note**
> These previews are generated by a 3rd-party service. It may take a few minutes for the template to be sent to the service and rendered, then sent back to TE to be displayed.
>
> The previews returned are static images that do not dynamically account for Liquid variables.

Publishing

Click the **Publish** button to make the template available in the list at **Email Marketing → Emails** for any user who has been granted access via the access settings, team settings, or user settings.

Click the down arrow next to the Publish button and select **Publish Template** to save the template and make it available in the gallery for a user who clicks Create Email and selects the Organization Content tab.
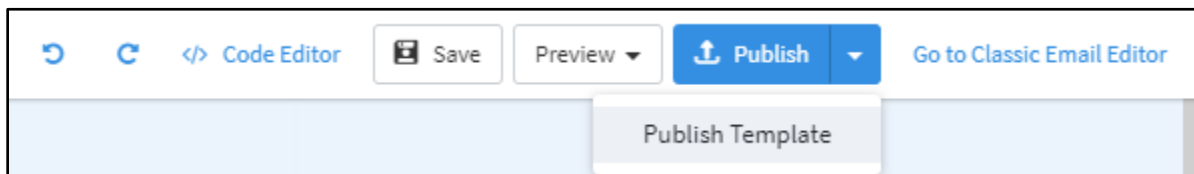
When the template has been published, the Publish button changes to Unpublish Asset or Unpublish Template. Click this button to remove the template's availability in the email list or template gallery.
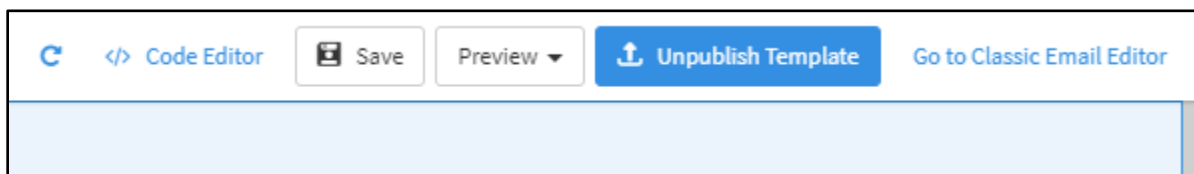
Email Template Actions

Navigate to **Email Marketing → Emails** and click the **Actions** button for a template. The following options apply to the selected template:

- **Send** allows you to select recipients, preview, and schedule delivery.
- **Preview** opens a pop-up box displaying a preview of the email.
- **Edit Tags** allows you to create a new tag or select an existing tag to apply to the template.
- **View Stats** opens the Email Stats page for that particular template.
- **User Settings** opens the user settings page where you can allow or deny users access to the template.
- **Team Settings** opens the team settings page where you can allow or deny teams access to the template.
- **Edit** opens the associated version of the email builder for the template (Simple Text, Blank Layout, Paste in code) and allows you to update the template.
- **Copy** creates an exact duplicate of the template that you can use as a starting point to build a similar template based on the original.
- **Delete** permanently removes the template after providing a confirmation prompt.
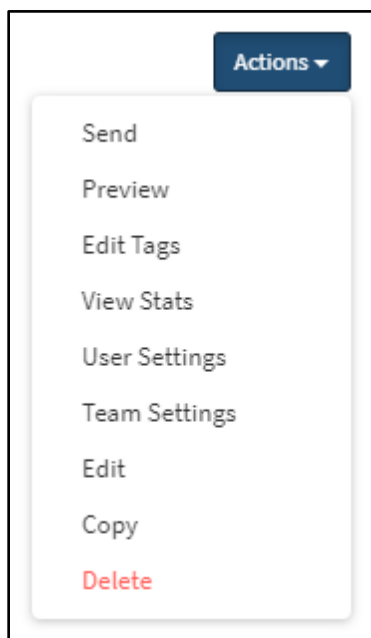
Further options are available in the template gallery. Navigate to **Email Marketing → Emails** and click the **Create Email** button to open the gallery. Then, for a saved template, click the ellipsis button **[…]** in the upper-right corner of its tile.

- **User Settings** opens the user settings page where you can allow or deny users access to the template.
- **Team Settings** opens the team settings page where you can allow or deny teams access to the template.
- **Edit** opens the template in the email builder.
- **Delete** permanently removes the template.

Blank Template Sample

This is the description of the template

User Settings
Team Settings
Edit
Delete

Select

Preview