Email Marketing for End Users

Table of Contents

Introduction

Note
This guide is designed to walk end users through the Total Expert email marketing product feature.

Email marketing allows for your business to expand by communicating to your customer-base via email. Marketing through email allows you to complete the following:

- Send specific marketing emails to individual or targeted contacts
- Schedule your messages to be sent automatically
- Analyze the effectiveness of your email campaigns

This function is permission-based and can be turned on for the entire organization or just a single role.

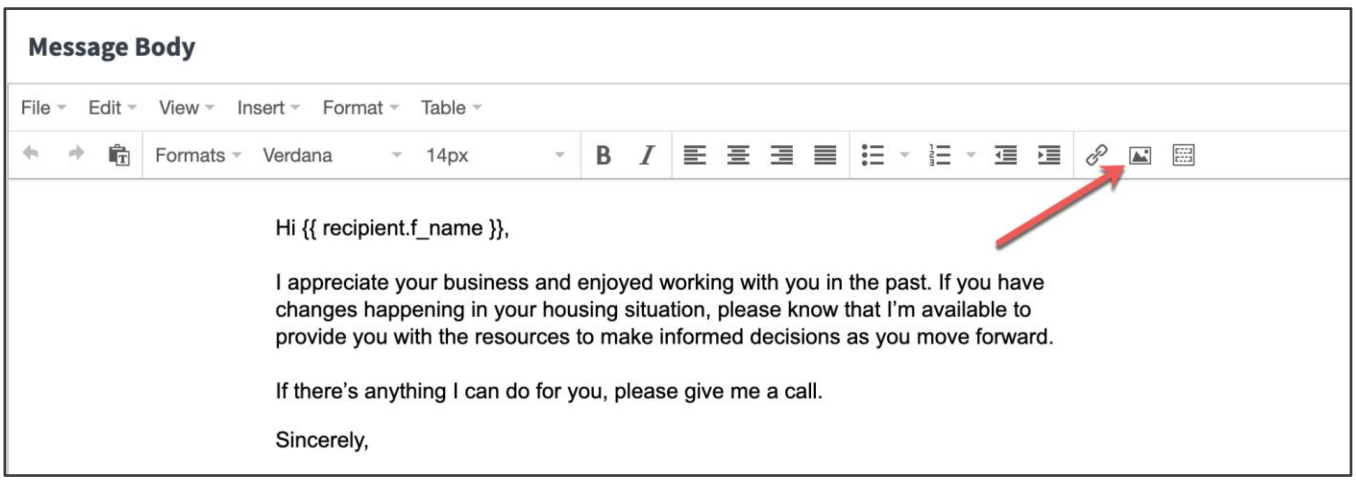
Email Templates

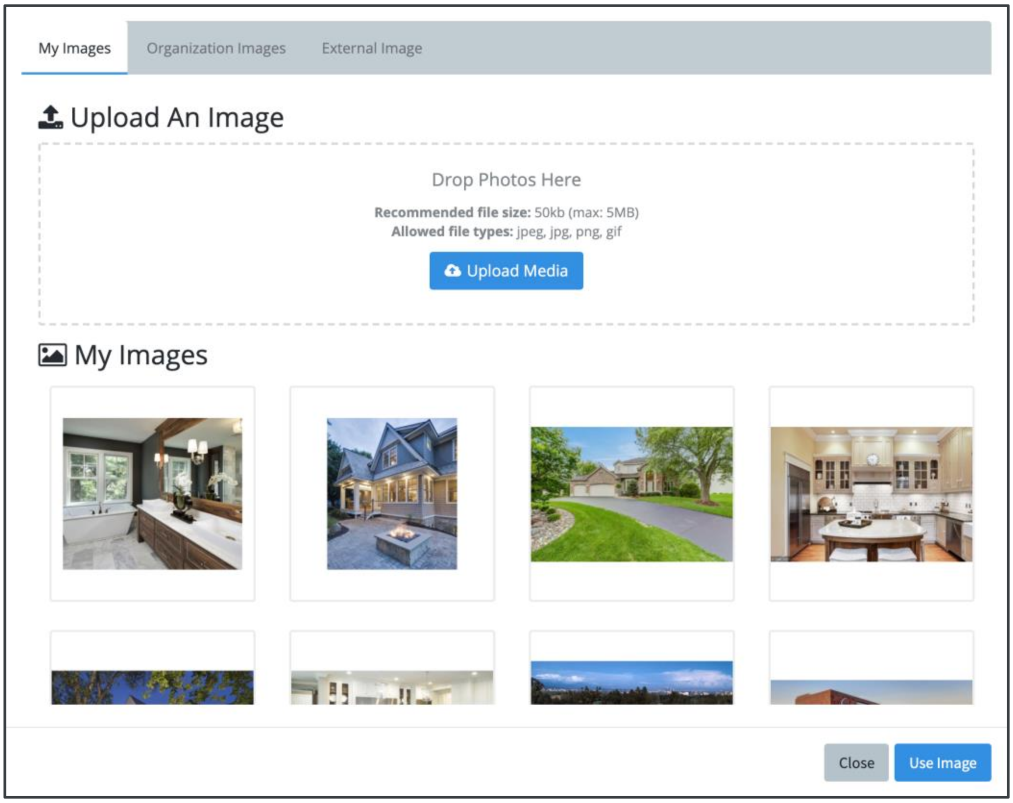
This feature allows loan officers to create their own personal marketing templates from the base template created by the internal administration team. This method ensures you are complying with organization-wide compliance rules and regulations.

How to Create New Email Templates

Note
You may not have the ability to add new email templates depending on your organization.

1. On the left navigation, click **Email Marketing > Emails**.
2. Click **Add Template**.
3. Input the name of your email template then click **Create Email**.
4. Update your settings (if applicable):
    - **Email Settings**
    - **Categorization Settings –** Folders and tags that belong to this template.
    - **Email Access Settings –** Who has access to this template.
    - **Compliance Notification Settings –** The amount of emails that can be sent before compliance teams are notified.
    - **Sections**
    - **Websites**
5. Input your message content.
6. In the editor toolbar, use the portrait icon to add AND/OR upload images to your email templates (see screenshot below).
7. Click **Save Email**.





Tip
It is always good practice to preview your email before sending.

How to Search For Certain Email Templates

1. On the left navigation, click **Email Marketing > Emails**.
2. At the top of the screen, choose a tag and/or choose a certain folder.
    - **Tags –** Labels that help separate content.
    - **Folders –** Files that hold certain segments of content.
    - (optional) Use the search bar to search for keywords if you still cannot find the template. E-mail name, subject line, and description are searchable.
3. Once you find the email template you want to use, click **Actions** to send or preview the email.

How to Schedule and Send Email Marketing to Selected Recipients

Note
Another method of sending emails to selected recipients is through your Leads & Contacts page. See the Leads & Contacts guide for more information.

1. On the left navigation, click **Email Marketing > Emails**.
2. Use the search bar, tags, or folders to find your specific email template.
3. Next to the email template you want to send, click **Actions > Send**.
4. (optional) If applicable, edit the message prior to sending.
5. Choose the **Recipients** tab.

- Check the boxes next to the name(s) OR use the filter settings to find specific subsets of contacts (such as groups).
- The contacts associated with your filter settings automatically appear.

6. If a filter was used, check the name(s).
7. (optional): If you want to schedule this email for a future time, choose a specific **Date** and **Time** in the side panel at least 24 hours in the future. This helps improve the likelihood of timely delivery through our preprocessing system. Click Schedule to confirm.
8. Click **Send Message** (in the legacy email sender) or **Send Email** (in the WYSIWYG editor).

Tip
To increase the likelihood of email being delivered on time, the platform executes a pre-processing action for emails scheduled more than 24 hours in advance. This action runs within 24 hours of the scheduled send time.

How to Edit Email Templates

Note
Some organizations do not allow you to edit email templates. Please reach out to your internal marketing team for assistance.

- Updated templates may need to go through an approval process before sending due to settings put in place by your internal marketing team.
- Both loan officers and agents have edit access to a co-branded email template once that access is granted by the administrator.

1. On the left navigation, click **Email Marketing > Emails**.
2. Use the search bar, tags, and/or folders to find a specific email template.
    - Please reach out to your internal marketing team if you cannot find the template you are looking for.
3. On the right side of the page, click **Actions > Send**.
    - A message may appear on the page letting you know if the template needs to go through another approval process after edits are made.
    - If you see this message, click **Yes, Edit Email** to continue.
4. Update your email template.
    - The following updates do not required approval:
        - Name
        - Subject
        - Schedule Delivery
        - Select Recipients
    - The following updates do require approval:
        - Editing the message body

How to Add Variable Placeholders to Emails

Variable placeholders automatically pull in specific contact information into the document that displays once sent. This allows you to send one templated email to multiple contact recipients.

Examples of variable placeholders:

- Sender First Name
- Sender Organization LinkedIn URL
- Co-Marketer Name
- Co-Marketer Title
- Contact Email
- Recipient Name
- Borrower Address
- Buyer's Agent Zip Code
- Loan Status Update

1. On the left navigation, click **Email Marketing > Emails**.
2. Next to the email you want to update, click **Actions > Edit**.
3. Under the *Message Body*, click **Insert > Template**.
4. Click the dropdown arrow and choose your template.
    - **Ex:** Using {{recipient.f_name}} or {{sender.f_name}} will pull the recipient or senders name into the email template.
    - **Note:** Repeat steps 3 and 4 each time you need to add a placeholder.

How to Preview Email Templates Before Sending

It is always good practice to preview the email template prior to sending. This allows you to see the email as the recipient sees it to make sure no further edits or adjustments need to be made.

1. On the left navigation, click **Email Marketing > Emails**.
2. Use the search bar, tags, or folders to find your specific email template.
3. Next to the email template you want to preview, click **Actions > Preview**.

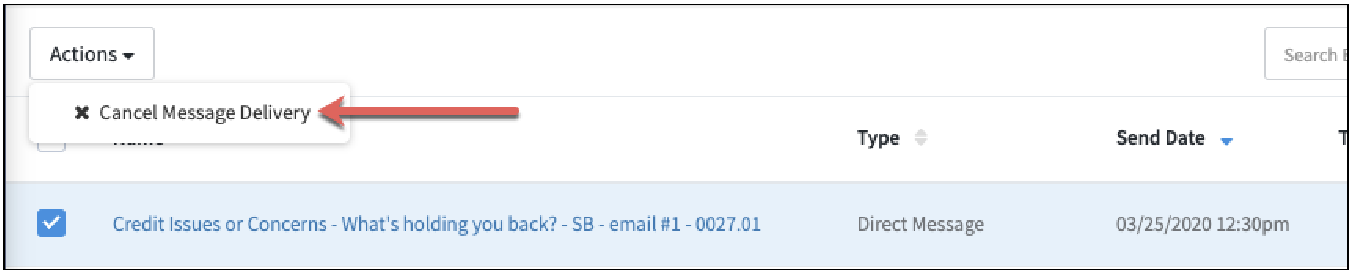
How to Cancel Scheduled Messages

Note

To provide flexibility for last-minute changes, scheduled emails can be canceled via the Email Stats page until 15 minutes before the scheduled send time. If you attempt to cancel closer to the scheduled send time, the request cannot be processed in time.

You cannot cancel messages that are less than 15 minutes before the scheduled send time or messages that were sent immediately.

1. On the left navigation, click **Email Marketing > Email Stats**.
2. Check the box next to the email template.
3. Click **Actions > Cancel Message Delivery**.



Email Statistics

The email stats page gives you a look into how well your direct messages, journeys, and drip campaigns are engaging with their recipients.

- Contacts that are CC'd or BCC'd on marketing email content do not display on the email stats page.

How to Find My Email Stats

1. On the left navigation, click **Email Marketing > Email Stats**.

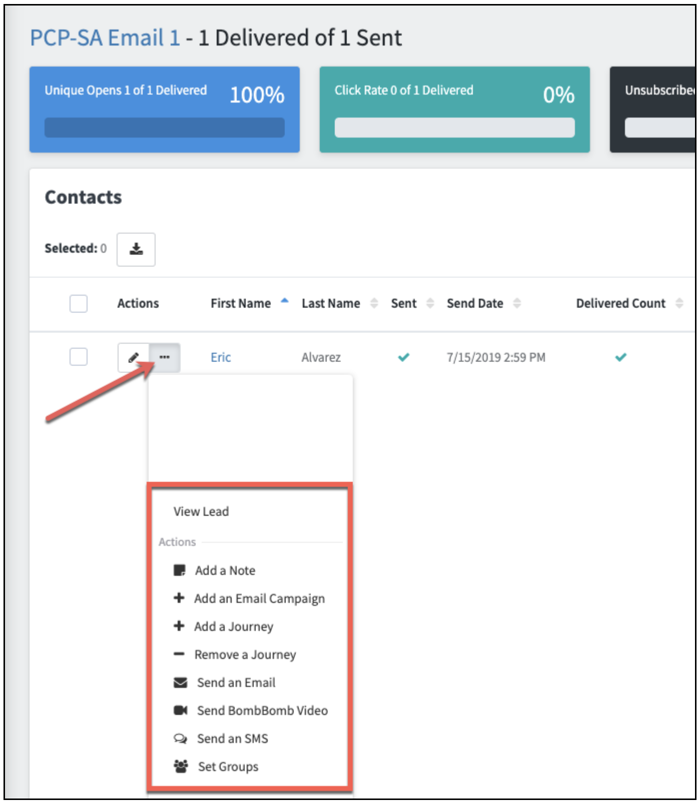
Columns

Tip
Click on the title of the email marketing piece to show in-depth stats.

- **Name –** Clicking on the name of the email will show in-depth stats regarding that specific template.
- **Type –** Classifying if your email is a direct message, journey, or drip campaign.
- **Send Date –** The date the message was sent.
- **Total –** How many recipients were connected to the email.
- **Canceled –** Has this message been canceled or not.
- **Sent –** Percentage of the recipients the email sent to.
- **Delivered –** Percentage of recipients that received the email.
- **Open Rate –** Percentage of the recipients opened the email.
- **Click Rate –** Percentage of the recipients clicked the links within the email content.
- **Bounces –** Percentage of the recipients that didn't receive the email due to the wrong email address on file.
- **Unsubscribes –** Recipients that chose to unsubscribe.
- **Spam Complaints –** Recipients that toggled your email as spam.

How to Take Action on a Contact

1. Within the **Email Stats** page, click on the name of an email template.
2. Under *Contacts*, check the box next to the contact and click the **three dots icon** (**...**)
3. Choose an action.



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