



Video Email Templates

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Introduction

Total Expert users can create and send emails with video links. By using the TE platform to send these videos, you have access to all of TE’s email template management, compliance tools (such as approvals), and performance metrics to streamline the process all in one place.

As an administrator, you can create an email template and assign access for users in your organization to use that template. In the case where the template includes a video element, some additional steps are required in the setup or for the end user, as covered in the instructions below.

A Total Expert user can create a video email template by inserting a video element in the template. In this element, you can either:

- Specify a particular video. The video you select will be saved in the template and used for any emails sent using the template.
- Leave it empty as a placeholder. It should then be filled by a user with access to the template before sending it.

A video element in an email template can be for:

- a video created in a user’s BombBomb account
- a video created in a user’s Vidyard account
- a link to a video stored elsewhere, such as YouTube, Wistia, or Vimeo

A user who has a BombBomb or Vidyard account can access their account’s video library and even record a new video directly from TE’s email editor. Instructions for each of these element types are given at the end.

Note
A Total Expert user can create a video email template with BombBomb or Vidyard placeholders even if they do not have an account with these services. However, a user must have an account with one of these services to record a video or select an existing video to fill the placeholder. Total Expert does not provide these accounts.



This document assumes the reader is familiar with building and sending email templates without video elements. For more information, see *Email Builder*.

Creating a Video Email

When you create an email template with a video element, you can either insert a specific video into the element or leave the element as a placeholder. In the latter case, any user with access to the template should fill the placeholder with a specific video before they send an email using the template.

To create an email template with a video element:

1. Navigate to **Email Marketing → Emails**.
2. Click the **Create Email** button at the top of the page.
3. In the Template Gallery, select the **Basic Content** tab.
4. Hover over the Blank Template tile and click the **Select** button.

Note

This assumes you are building your template completely from scratch. You can also insert a video element into any existing template.

5. In the Create Email box, enter a name for your new template and click the **Confirm and Save** button.
6. If not already selected, click the **Elements** tab on the far left side of the email builder.
7. Click and drag one of the options from the Layouts section in the side panel to the email canvas on the right side. The option you choose is determined by your intended layout for the template.
8. Click and drag one of the following options from the Elements section in the side panel to an open space in the layout you added to the canvas: **BombBomb**, **Vidyard**, or **Video**.
 - a. If you want to leave the element as an empty placeholder to be filled before each time an email is sent, no further setup in the element is necessary. Continue with step 9.
 - b. If you want to add a specific video to the element, double-click it and follow the instructions for the specific element type under Element Instructions below.
9. Finish building the rest of the template on the canvas as you would for any other email template.
10. Apply appropriate settings, save, publish, and assign access as you would with any other email template.

The template is ready to be used by any user who has been granted access.

Sending a Video Email

When you want to send an email using a template with a video element, the process depends on whether the template was given a specific video or the element was left as a placeholder. If it already has a specific video, no further action is necessary (though, depending on the template's settings, you might be able to replace it with a different video). If the element is a placeholder, you should insert a specific video into the placeholder before you send it.

Warning

If you do not fill a placeholder, the email will be sent with the empty placeholder visible to the recipient. Always review your email before sending it.



To send an email template with a video element:

1. Navigate to **Email Marketing → Emails**.
2. Locate the template in the library and select **Actions → Send**.

Note

If the template is set up to require an approval before sending, you must acknowledge this by clicking the **Yes, Edit Email** button before you can make changes to the body of the email.

3. Locate the video element in the body of the email.
 - a. If the element has already been filled and you do not want to change the provided video, no action is necessary. Continue with step 4.
 - b. If the element is an empty placeholder or you want to change the provided video, double-click the element and follow the instructions for the specific element type under Element Instructions below.
4. (optional) If you have editing privileges, make any other appropriate edits to the body of the email as you would when sending any other template.
5. Select your intended recipients from the Recipients tab and apply any settings in the sidebar as you would when sending any other template.
6. Click the **Send Email** button.

The email is sent with the selected setup.

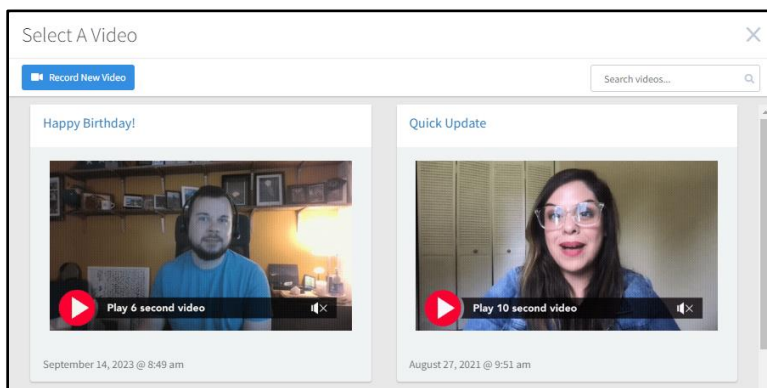
Element Instructions

The instructions for the specific element types below are the same whether you are building a template or filling a placeholder before sending an email.

BombBomb

To add a video to a BombBomb element, you must have an account with BombBomb. BombBomb does not offer free accounts, and Total Expert does not provide an account for you. Once you have signed up for an account, you must then integrate it with your Total Expert account via your Integration Settings page.

1. Double-click the element. The Select A Video box opens.





2. Either:
 - a. Click the name of a saved video.
 - b. Click the **Record New Video** button in the upper-left corner and use the video recorder to create your video. When you are finished recording, the new video is added to your list, where you will have to select it.

A thumbnail of the video is shown in the element, which is now ready to send.

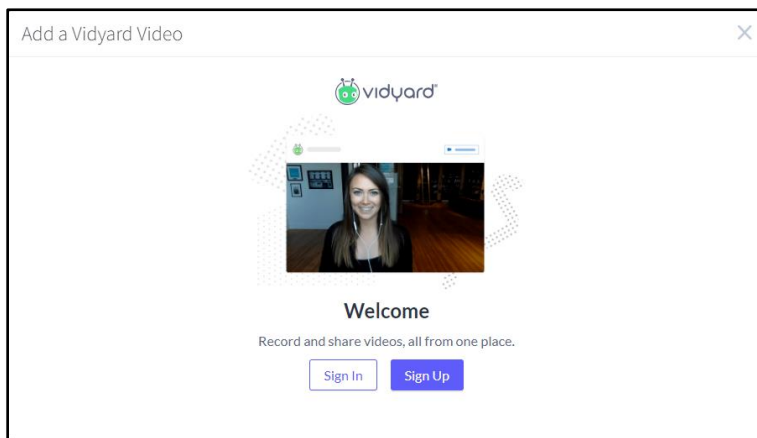
Vidyard

Vidyard offers free accounts with limited features and paid accounts with expanded functionality. Total Expert does not provide an account for you, but you can sign up for an account from inside your Total Expert account as described below.

Note

Your browser settings must allow 3rd-party cookies, otherwise your Vidyard video library cannot load through Total Expert.

1. Double-click the element. The Add a Vidyard Video box opens.
2. If you are not logged into a Vidyard account already, you are prompted to sign in or sign up for an account.

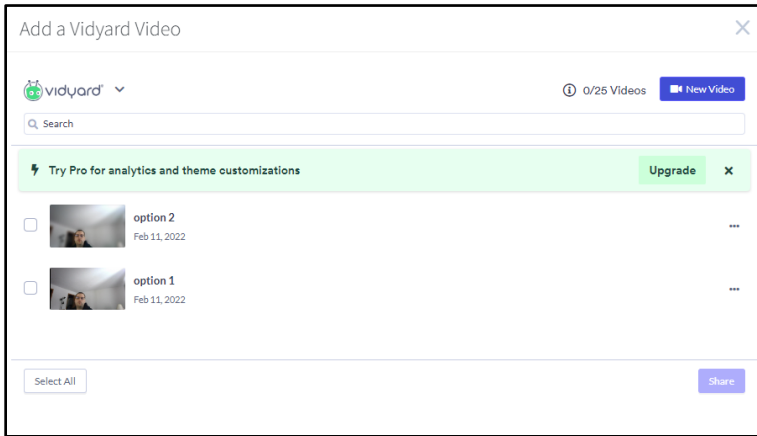


- a. If you already have an account:
 - i. Click the **Sign In** button. A separate Vidyard login window opens.
 - ii. Enter your email address.
 - iii. Click the **Next** button.
 - iv. Enter your password.
 - v. Click the **Sign In** button.
 - vi. If you have not previously linked your accounts, click the **Authorize** button on the next screen.
- b. If you have not previously signed up for an account:
 - i. Click the **Sign Up** button. A separate Vidyard signup window opens.
 - ii. Enter your email address.
 - iii. Click the **Sign Up with Business Email** button.
 - iv. Enter your first name, last name, and a password for your account.



- v. Check the box acknowledging that you agree to the Vidyard Terms.
- vi. Click the **Sign Up** button.

Once you finish signing in or signing up (or if you were signed in already), your Vidyard library appears.



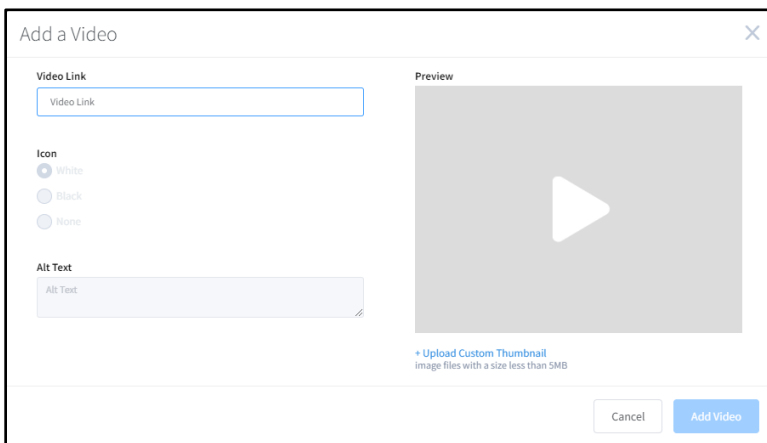
3. When your Vidyard library appears, either:
 - a. Select the checkbox on the left for an existing saved video.
 - b. Click the **New Video** button in the upper-right corner.
 - i. From the drop-down list, select either **Camera Recording** (to use your device’s camera), **Screen Recording** (to capture your device’s screen image; this requires a browser extension), or **Upload Video** (to upload a file from your device).
 - ii. Follow the prompts to add a new video to your Vidyard library.
4. Click the **Share** button.

A thumbnail of the video is shown in the element, which is now ready to send.

Video

No third-party account is needed to use this element. This creates a link to a video stored online.

1. Find the URL of the video you want to include and copy it to the clipboard.
2. In the email template, double-click the element. The Add a Video box opens.





3. In the Video Link field, paste the URL that you just copied.

Note

The address must be complete (including the `http://` part of the address) and point to a page that includes a video. Otherwise an error message appears at the top of the screen, and you will not be able to proceed.

When the system recognizes a valid link, a thumbnail representing the video appears in the Preview area on the right side.

4. In the Icon section, select a color for the “play button” indicator that will appear on the thumbnail when the email is delivered. Your choice is reflected in the Preview area.

Note

This does not cause the email to play in the recipient’s email client. The entire thumbnail serves as a link to the video, and the “play button” merely serves as a visual cue to the recipient that clicking the thumbnail will cause a video to open.

5. In the Alt Text field, enter some text that can represent the video in the placeholder if the thumbnail image cannot be loaded for any reason. The system will attempt to fill this automatically when verifying the video URL.
6. (optional) Below the preview image, click **+ Upload Custom Thumbnail** and locate a file stored locally to insert as a custom preview image.
7. Click the **Add Video** button.

A thumbnail of the video is shown in the element, which is now ready to send.