How to Create an Email Using the Alternative Composition Methods

To compose an email using one of the alternative composition methods, hover over the envelope icon in the left-hand navigation bar and click *Create Email*.

Step 1 Choose a Composition Method

On this page, the Builder composition method is selected automatically. For one of the alternative composition methods, select one of the following:

- **Classic:** our What-You-See-is-What-You-Get (WYSIWYG) editor
- **Coder:** allows experienced designers to edit their email's template using HTML or CSS
- **Import Template from URL:** If you have a Content Management System (CMS), like Joomla or WordPress, or you send recurring email (like a daily newsletter), this feature allows you to generate your newsletters automatically by fetching the online content and sending it without having to re-create it. *Selecting this option will bypass template selection entirely. Editing is done using the Classic composer.*
- **Upload Template from ZIP:** If you have in-house designers, you can use the Upload ZIP file function to upload HTML newsletters which they save in .ZIP format. *Selecting this option will bypass template selection entirely. Editing is done using the Classic composer.*

Please note: Emails built in the Classic builder **aren't responsive** to mobile screens.

Step 2 Choose a Template

If you've selected the Classic or Coder composition methods, you can now select an email template ***(Import from URL and Upload from ZIP methods will progress directly to step 3).***

Templates have predefined style sheets and formats and are designed to be used as-is, so choose one that's best suited to the layout of your content. If you have a specific layout in mind, you can also customise a blank template.

To choose a template:

1. Scroll through the templates to find one that you like or navigate through the categories to find something specific.
2. Hover over the template thumbnail that you're interested in. Here, you can either click on the eye icon to preview it or click on the pen icon (or anywhere on the thumbnail) to proceed to the next step.

Step 3 Message Properties

Message properties are the basic details that differentiate this email from all the others you will create. These include:

Property	Details
Subject	The subject line your subscribers see when the mail arrives in their inbox. This will likely determine if your subscribers open your email.
Inbox preview text	A short summary of the email following the subject line when viewed in the inbox. The average email client displays about 75 characters.
Description	If you want to add a description of your email, for your own records, you can enter it here. This also helps differentiate your mails if you're sending multiple emails with the same subject line.
From name	The name you'd like subscribers to see your message is from when they receive your message in their inbox.
From Email	What your subscribers see as the 'From' email address in their inbox.

By default, the 'Reply-to' email address is the same as the 'From' address. If you want to use a different address for contacts to reply to, check the box below 'From email' and enter the required reply address in the field provided.

Message Property Personalisation

You can personalise most of these message properties. This is a great way to connect better with your customers and catch their attention. To do this:

1. Click the Personalisation icon (the little blue person) next to the property you'd like to personalise.
2. Select the field you'd like to include in your personalised subject line, like first name.
3. Check the checkbox if you want to include a fallback option (a word to use if the field is empty – this is recommended) and specify what it should be.
4. Click *Insert*.

Emojis

Emojis are small digital images or icons used to express an idea or emotion – you can use the emoji buttons next to subject line and preview text to include these in here too. Most email clients support emoji, but we recommend still using a subject line that makes sense without the emoji in case.

Standard Campaign

Adding your email to a standard campaign will allow you to compare statistics on similar messages after sending. To do this:

1. Check the Standard Campaign checkbox
2. Choose the campaign you want to group this email with

Step 3B Paste Your URL or Select Your ZIP File

If you've selected the import from URL or upload from ZIP option, you'll now be directed to get your content.

Import From URL

1. Paste the full URL into the URL field.
2. Choose whether you want to import the URL now or at send by selecting the correct option in the drop-down box.
3. Click *Next*.

Upload From ZIP

Click the Browse button to find your ZIP file. For the upload to work correctly, it must only contain the single HTML document and an image folder with the necessary pictures inside.

Once you have uploaded a ZIP file, a preview of the email will be shown in the preview panel. Then click *Next*.

Step 4 Compose Your Email

For Classic, Import from URL, and Upload from ZIP options, the Classic editing panel will now open for any additional editing you want to make.

For the Coder method, scroll to Step 4B below.

The Classic editing panel features the text box displaying your content and the WYSIWYG editor menu buttons at the top. At the top of the editing panel, there are two tabs:

1. **HTML:** This is the default panel for composing emails. Using the WYSIWYG toolbar, you can edit the text, add images, and use personalisation to build your email.
2. **Text:** If some subscribers can't receive HTML content (like emails with images and rich design), you can enable a plain text version that the system will send to them. Read more at the end of this document.

HTML Tab

If you've pre-selected a template and customised the design, you can start editing the content using the What You See Is What You Get (WYSIWYG) editor. The editor displays the icons you'll use to format your email, edit text, and upload images. Hover your cursor over each icon to view the description.

Editing Text

The text styling buttons work like any other text editor (like MS Word). Some functions include:

Function	Details
Paste	Pastes copied text into the editing panel, retaining the formatting in the text.
Paste as plain text	Removes all formatting and pastes plain text into the editing panel.
Paste from Word	Pasts a 'clean' version of any text copied from a Microsoft Word document.
Formatting styles	Apply predefined styles to your text as required. Highlight the text you need to edit and click on the drop-down of this icon for the style options to display.
Insert / Remove Numbered List	Arrange your content in a numbered list. Highlight the text paragraphs and click on this icon to apply or remove a numbered list. Each paragraph is a treated as a separate list item.
Insert / Remove Bulleted list	Arrange your content in a bulleted list. Highlight the text paragraphs and click on this icon to apply or remove bullet formatting.

Inserting Links

Insert or remove links to external web pages or to locations within the email itself.

Option	Details
Link	Insert links to webpages, email addresses, and anchors in the email itself. Highlight your text and click on this icon. Select the link type from the drop down and fill in the fields.
Unlink	Remove an existing link from text. If you're changing an existing link, use this to remove it completely before recreating the link.
Anchor	Insert anchor tags into the body of your message. Anchors are used to create easy navigation within the email by linking text to text within your mail. When contacts click on that piece of linked text, it will take them to the anchor in the body of your email.

Follow these steps to insert an anchor:

1. Click your cursor onto the area where you'd like the anchor to go.
2. Click the Anchor icon in the editing toolbar.
3. Enter a name for your anchor. Keep it short and descriptive so that you can remember it easily.
4. Click OK.
5. Highlight the text that you want the anchor to link to. When your contact clicks the anchor, it will automatically take them to this part of the email.
6. Click Link.
7. Set the link type to 'Link to anchor in the text' and use the drop-down menu to select your anchor.
8. Click OK.

Images

Upload and insert images into your email using the image icon. To do this:

1. Position your cursor where you'd like the image to go.
2. Click the Image icon.
3. Click Browse Server.
4. Click Choose File.
5. Select the relevant file and click Open. The file will be uploaded automatically.
6. Double click the image to select it. You'll see a preview in the Image Properties window.
7. In the image properties, choose to left- or right-align the image, give it a border, and adjust spacing between the text and image.
8. Enter the Alternative Text; this explains what the image is for subscribers who don't download them.
9. Click OK when you're done.

Once the image has been inserted, you can right-click on it to access the image properties.

> Images can't be copied and pasted into your mail; subscribers won't be able to view them this way.

Tables

You can insert a table into your message by following these steps:

1. Click your cursor in the body of your mail where you'd like the table to go.
2. Click the Table icon.
3. Select the number of rows and columns and set general table specifications.
4. Click OK to insert.

You can right-click the table to access the table properties.

Personalisation

Standard personalisation can be by contact name, like "Dear John". Automated links for unsubscribes or viewing web versions of the email and social sharing links can also be inserted via the personalisation tab. To include personalisation in your message:

1. Position your cursor where you want to insert the personalisation field.
2. Click the Personalisation button (the little person icon) to open the modal.
3. Expand the personalisation options by clicking a field name.
4. Click *Insert* to add the personalisation tag to your message.

Once you've inserted the personalisation fields, you will see a field tag in your message. This tag tells the system which data it must pull from your database to populate the field.
Attachments

To add attachments to your email:

1. Click *Add Files and Events* to find and upload the file from your computer.
2. Click *Browse Computer* and find the file you want to upload.

You can view your attachments, delete them, and see their size in the Attachments modal.

Dynamic Attachments

You can add dynamic attachments – personal files that you've saved in your database – to your email here too. To do this:

1. Click the Dynamic Attachments dropdown.
2. Choose the field you want to use.
3. Click *Attach*.

You can use dynamic attachments to send individual, personalised attachments to your contacts (e.g. Monthly invoices).

To send a calendar invite, add an event.

1. Click Create Event.
2. Fill in the details of your event.
3. Click Attach Event. The system will now send a calendar file that your contacts can add to their calendars.

Custom Footer

If you decide to disable the standard email footer (in step 6: Delivery Options), you'll have to insert the unsubscribe link manually. You can do this using personalisation tags. Insert the personalisation tag using the WYSIWYG bar.

To set your own footer, type in the required text, highlight it, and use the Link button in the WYSIWYG bar. Set the Protocol to 'other' and insert the personalisation tag from the table below.

Field	Details	Personalisation	Code and Text
Unsubscribe	Subscribers clicking on this link will automatically be updated to 'Unsub-scribed' in the system.	Link > Subscribe	{{components.unsubscribe}} Follow this link to unsubscribe
Forward Message	Subscribers clicking on this link will be taken to a page where they can insert a friend's email address and forward the message to them. This type of forwarding will be tracked in Email reporting.	Link > Forward Message	{{component.forward}} Follow this link to forward this message
Complaint link	Subscribers clicking on this link will be taken to a page where they can log a complaint. The contact is then automatically switched to 'Off' in the system.	Link > Complaint link	{{components.complaint}} Notify us
Update Profile	Subscribers clicking on this link will be taken to a page where they can update and save their details. Details are automatically captured in the system.	Link > Update Profile	{{components.update_profile}} Update your profile by clicking on the link

Text Tab

To customise the text-only version of your email, click on the Text tab. Here, you can:

- **Copy from HTML:** Click *Copy from HTML* to get the text version of the HTML mail.
- **Automatically Extract:** Extracts text from an HTML file and creates a text-only version.
- **Import from URL:** Extracts the HTML from a URL and creates a text version of the website.

Once the plain text is loaded, you can add personalisation tags by clicking the *Add Personalisation* button.

Step 4B Compose Your Email Using the Coder

If you've chosen the coder composition method, it will open its own interface. This includes a plain-text editor, a library of standard code which you can add to the email's code, and three preview panels. The preview panels are:

- Split: Display a split screen of the code and a preview of the template.
- Design: Preview the message template. You cannot edit from the template.
- Code: The default editing panel with the full HTML code.

You can select the style of the text editor from the drop-down list.

Add Files and Events

You can add three types of attachments to your email:

- **Regular attachment:** Browse your computer to attach a single file to your message.
- **Dynamic attachment:** Send custom attachments from your database to your contact list in one email.
- **Event:** Create and attach a calendar invite.

Personalisation

Insert personalisation tags in your email template. Place your cursor in the correct place in the code and click *Personalisation* to add your tags.

Images

Click *Image* to insert the image code into your email template. The full < img src > tag, with the URL of the image will be placed into the code.

Snippet

To add a code snippet to the email, like a formatting instruction, position your cursor in the right place in the code and click *Snippet*. Select from the list of codes available.

Click *Next* when you've finished composing your message.

Step 5 Select Lists

In this step, you can define which lists to send your message to, as well as segment your lists for deeper reporting. To do this:

1. Check the **checkbox next to a list's name** to select it. You can choose multiple lists.

Each time you select a list, the system will show an approximate count of the number of recipients the message will be sent to. If you want a more accurate number, click the refresh icon next to the estimated number. It may take a few moments to update the number because the system must query your database and count all the recipients in your chosen lists, taking filters into account.

2. To target a more specific audience within these lists, **click on the Apply Filter button**. Here, you can search for and select a filter you've created before, you can filter according to a specific list that you've imported into the system, or you can create a filter by clicking on the plus icon.

In the Create Filter modal, name the filter, provide a description, and specify the exact conditions you'd like to include using the drop-down lists. You can add multiple conditions to this filter and delete conditions. The *Advanced Filters* button will open the filter creation page on a separate tab, where you'll have a more advanced view of the same filter-creation process. When you're happy with the filter, click *Save*.

You may find that the total number of recipients is lower than the total number of contacts in your selected lists. This can be caused by two things:

- A single contact may exist in more than one list.
- You may have SMS and email contacts in one list. As you're composing an email, the SMS contacts won't be counted as recipients.

When you're comfortable with the lists and filters you've selected, click *Next*.

Step 6 Delivery Options

The delivery options tell our platform what to do with your email when it sends it, and what to do with the statistics it gathers afterwards. Toggle between to the tabs to specify the details of your email:

Sending Options

On this tab, you can customise:

- Which language to display default text in.
- Which email address the platform must send notifications to, if needed.
- The Embed Images option has been disabled to improve your email delivery and increase your emails' chances of getting to your subscribers' inboxes.
- To remove duplicate email addresses from your mailing list to avoid sending the same email to the same contact multiple times

Tracking Options

Here, you can connect Everlytic to your Google Analytics account, if you have one. This enables you to track opens and link clicks on a message, providing you with rich stats in Email History afterwards. The system will automatically use the email details as the Google Analytics references.

If you've specified a campaign that this email will be a part of in the email properties step, this campaign name will show in the Campaign Tag text box. If you haven't selected a campaign, the system will use the email subject line instead. If you want to change the reference, type one into the textbox or select one from the list of tags you've used in previous messages.

You'll need to connect your email domain with your Google Analytics account for this to work. Check if your domain is connected by clicking View Domains. If your domain isn't connected, you can do so now by clicking Add Domains.

Attachment Tracking

If you've loaded attachments to your email, a Track attachments checkbox will appear here too. When it's selected, the attachment will appear on the footer. When it's off, it appears as a normal attachment in the email.

Footer

In this tab, you can manage elements in your email footer.

- The **Unsubscribe link** is required by law. You must have one in every single email you send.
- Below this, some customers will see a drop-down list. This enables these customers to select the **size of the footer** they want to include in the email. The Standard option is a bit shorter, while the Extra option includes your company address.
- You can add **forwarding links** to your footer too. These links will track when your contacts forward your emails to their friends using these links.
- If you've integrated your social media accounts, you can **add social links** to the email by checking the social link you want to add.

Approval and Reports

If you need to get approval from a lead manager for your message, you can enter the email addresses to request approval from here. To do this:

1. Check the Get approval checkbox.
2. Enter the names and email addresses of the people you need to get approval from in the text boxes provided.

You can request approval from multiple people, but it only takes one positive response for our system to start sending your message.

3. Check the Send Reports checkbox if you want to automatically send reports on the email's performance.
4. Set a period to wait, in days, before the system sends the email. It's worth doing some research here to see when your contacts interact with your emails. It's probably safe to set this around three to five days after send, but your results will vary depending on your audience.
5. Choose if you'd like to allow your recipient to export data from your reports and enter their email address.

Scheduling

In the Scheduling tab you can set a future sending date, time, and recurrence for your email. Recurrence is useful for reminder emails, or anniversary emails. Birthday emails fall into this category. To do this:

1. Check the checkbox next to *Schedule this message*.
2. Set a specific date and time to send your message.

Intervals

Set up staggering and rate limiting if you're sending to a large list. To set this up:

1. Check the checkbox and select the option you want from the drop down.
    a. **Staggering:** Sets the system to pause after sending a specific number of emails.
    b. **Rate limiting:** Pauses the send after a certain number of emails have been sent.
2. Set the amount of time to wait between each batch.

You'll need to re-start the sending process manually after each pause if you choose this option.

Social Posting

In the Social Posting section, you can publish your emails on social media.

If you've already set up your social media accounts, you can select them here. Alternatively, click *Add Accounts* and work through the wizard to integrate a social media account. We currently support Facebook, Twitter, and LinkedIn.

Facebook:

a. Select the Facebook page you'd like to post to if you've added more than one.
b. Write the text for your post.
c. Click Insert *View Online Link* to add in a personalised link that followers can use to view a version of your email online.
d. Unselect the *Post Thumbnail* knob if you'd prefer not to include a thumbnail.

Twitter:

a. Add the text for the Twitter post that you'd like to include.
b. Select the Twitter page that you'd like to post to if you've added more than one.

LinkedIn:

a. Add the text for the LinkedIn post that you'd like to include.
b. Select the LinkedIn profile that you'd like to post to if you've added more than one.

Once you've finalised your delivery options, click *Next*.

Step 7 Confirm & Send

The summary and sending options page shows a preview of the message, with the options you've selected, as well as the number of contacts the message will be sent to. You can view all message details like:

- Message preview
- Message properties
- Attachment details
- Lists selected
- Number of contacts the message will be sent to
- Sending options selected
- Tracking details
- Reporting options
- Social settings
- Footer selected

You can also send yourself a test email, get a preview of your email, check the SPAM score, and see an Inbox preview one last time.

If you need to return to previous steps of composition to edit your message and its properties, click the *Back* button or the pencil icon in the section you'd like to edit.

A warning message will appear in the preview window if your message size is above 350KB. To reduce your email size, try:

Reducing the size of your attachments
Remove any embedded media from your email
Disabling the Grammarly plugin on your system

When you're ready, click *Send* and the system will start sending your message or will schedule it to send on the date and time that you've set it to. To locate scheduled messages that haven't been sent yet, hover over the email icon in the left-hand navigation bar and click *History*.

If the message requires approval, click *Await Approval*. Once the message is approved, it will automatically start sending. If the approval is rejected, you can edit the message from the Saved messages area on the History page.

Pause Email Sending

Once you've clicked *Send*, your message will immediately start sending. If you need to pause the message or cancel it, you can do this on the History page too. However, some emails will already have been sent before you pause or cancel.