

Email Editor Tips

08/27/2024 12:15 pm CDT

Overview

If you aren't familiar with the visual "wysiwyg" editor common to email and blog platforms, you might feel a little lost when creating or editing your email templates. We've outlined some common questions and tips below so you can make your emails look and function better for your customers.

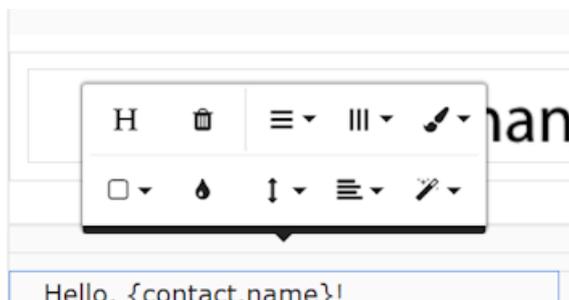
These apply to both Automated and **Ad Hoc Email** templates. You can find both in Control Panel.

Tables

In the **Automated Email Templates**, there's already formatting and design in place to help your email look better in a variety of email readers.

You'll notice that the content is set in the center and isn't full width. This is because it's set up in a **Table**, which is the preferable way to design for email templates. This is because email readers (like Outlook and Gmail) are a little old-fashioned in what they will render and display in emails. Tables were commonly used for web design in the earlier days of the Internet and are still the best way to set up your email templates. Using more current CSS (styling) often won't work in an email reader.

If you click into an area of the table, a box with formatting options will pop up. Hover over each of the icons to see what it's for.



You can add or delete rows, as well as add or delete columns.

You can also set your formatting (like a table Header) or add color. When looking at a table, the area that is formed within the row and column is called a **Cell**.

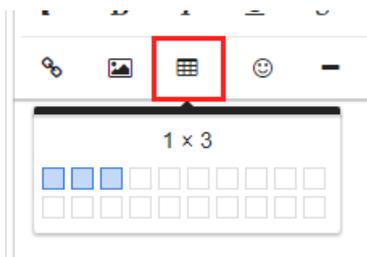
If you're inside of a cell, clicking **Enter** will add more lines into that cell specifically. It doesn't create a new row of the table, but only a new line in that cell. This results in a taller cell or row.

If you have columns, you may want one to be wider than the other. Hover over the line between the columns and you can click and drag left or right to widen or narrow a column.

You can also use the alignment icons to align the content within the cells horizontally and vertically.

Need a table? In the main formatting bar at the top, there's a table icon you can click to insert a table. You can select

the number of rows and columns you want to get you started, but you can always add more.



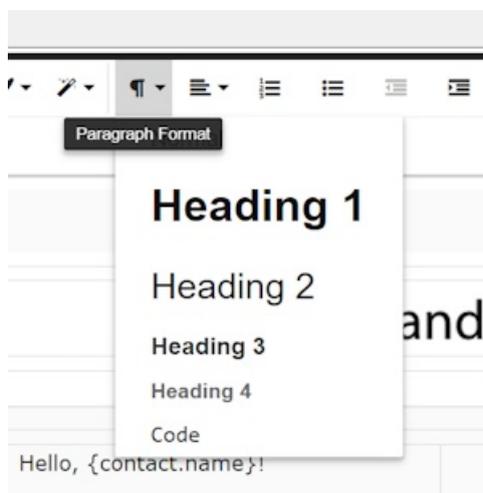
Text Formatting

Along the top of your email editing screen, you'll see a lot of icons for different formatting options. There's several for text, like bold, font family options, indenting, and alignment.



If you select a formatting option and begin typing, your text will appear as you just set it. To change existing text, make sure you highlight it first.

The Paragraph formatting is helpful if you have a longer email and want some hierarchy to it, like you would see in a Word doc or PDF.



You can create numbered or bulleted lists as well. Selecting that option will allow you to hit Enter to start a new numbered or bulleted item. To "escape" the list when you're done, hitting Enter twice will get you out of it and back onto a regular paragraph line.

Adding Images

Using the Image icon at the top, you can insert images into your email. Position your cursor in the email where you want the image to go first, then click the icon. You'll have the option to upload a file directly, find an image in your collateral library (the file icon,) or if your image is hosted somewhere else you can paste in the link to it (the link icon.)

Once the image is added, you'll have the ability to adjust the size and some other formatting options by clicking the image and looking at the pop up. You can also add a link to the image so that it's clickable.

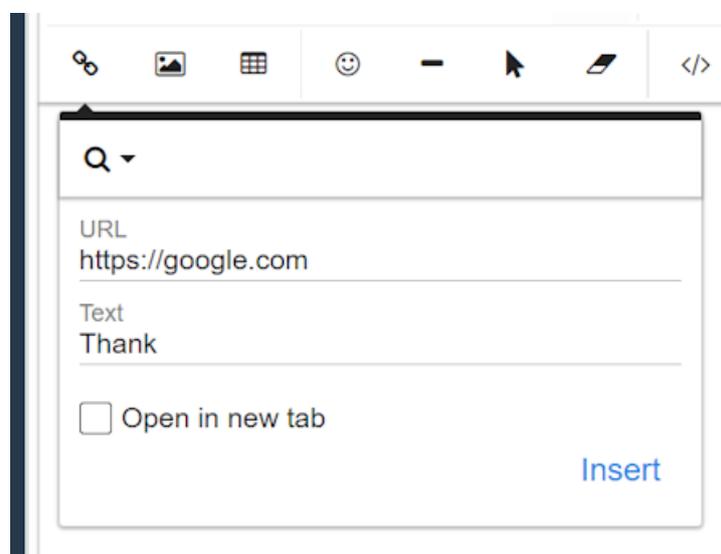


The icon in the bottom right (the four arrows) is for the sizing. The image will default to 300px wide when it's first added, but you may want that to be larger (or smaller.) Click that and enter a new width. If you leave the height empty then it will auto adjust, keeping the same proportions so the image isn't stretched or squashed.



Adding Links

To hyperlink text, you can highlight your desired text, click the Insert Link icon at the top, and then add in the URL (where the link should take them) and adjust your hyperlinked text in the same box.

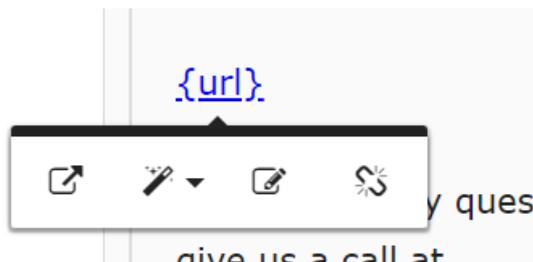


You can add direct URLs, or use some of our shortcodes that output a link.

"Open in New Tab" will do just that - when clicked, the link will open in a new tab so that the user doesn't navigate away from their email to visit the link.

Make sure you hit Insert, otherwise the link won't be saved.

For an existing hyperlink, click it and a box will open where you can visit the link (great to test that the link is working/correct,) style it, edit it (make sure to click Update if you edit the link,) and remove the link.

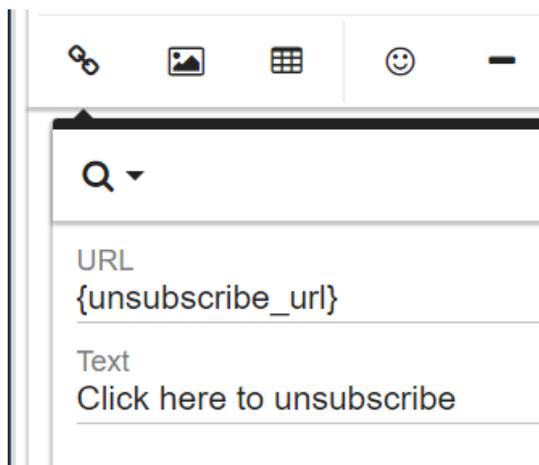


Unsubscribe

For standard customer communication, the unsubscribe url isn't necessary. But if you're sending out an email campaign, the URL is a requirement. It's simple to add into your template (typically at the bottom of an email, often in smaller text.)

Use our shortcode and set it up like a link (instructions above.)

{unsubscribe_url}



To learn more about [Shortcodes](#), visit our full list.

Advanced Options

Know some HTML? You can switch over to Code View and add/edit the HTML there. You can also add CSS to style your email.



Not Allowed

You cannot embed videos or iframes into your email. While the editor will allow you to add them, the email reader won't render them for the user - it'll just be blank space. If you have a video or something like an online newsletter, you can add an image with a link that will take the user to that page to view it, instead of viewing it directly in the email.

If you're going to do any custom CSS, you'll want to check that it will work/is compatible with email readers.
