

Branding Email Campaigns

04/24/2025 2:52 pm CDT

Overview

Branding Email Campaigns are crucial for maintaining consistent communication with your customers, promoting new products or services, and driving engagement. It helps in building brand loyalty and can significantly impact your marketing efforts by reaching a wide audience efficiently.

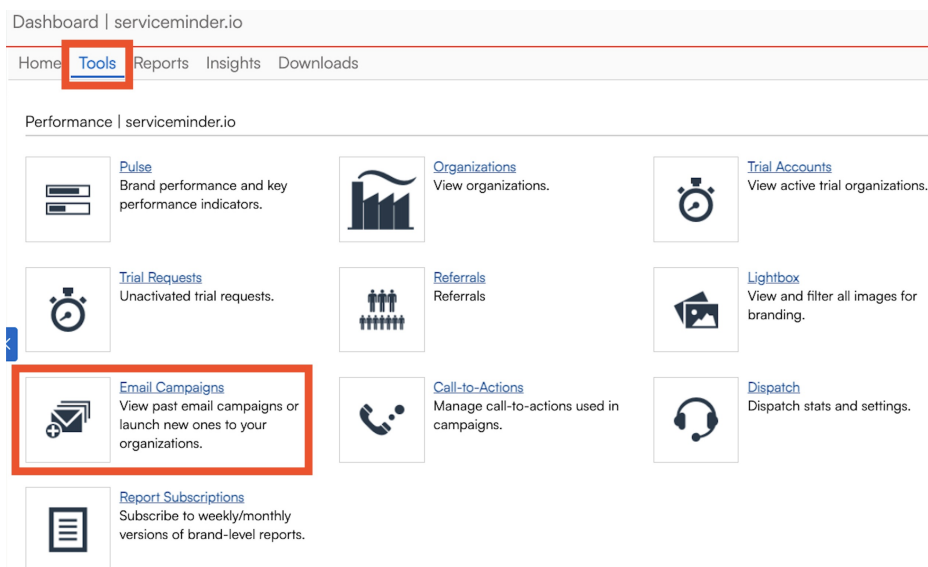
This article will help you understand how to launch brand-wide email campaigns. By following these steps, you can effectively create, customize, and launch email campaigns to engage your audience.

Video Tutorial










Your browser does not support HTML5 video.

Settings and Navigation

To launch a new campaign or review existing campaigns, navigate to the **Dashboard**. Click on the **Tools** tab. Under the **Performance** section, select **Email Campaigns**.



Before creating a brand email campaign, you may want to create a brand email template. Alternatively, you can set up an email theme to use and draft the body of the email while creating the campaign. To do this, navigate to the **Dashboard**. Click on the **Tools** tab. Under the **Settings** section, select **Email Templates** or **Email Themes**.

 Configuration View and modify your brand's configuration options.	 Revenue Categories Revenue categories help group service revenue for royalty and performance tracking.	 Regions Manage the regions for your organizations.	 Tags Manage organization tags.
 Collateral Library Upload brand specific images and documents.	 Email Themes Theme-based templates for email messages and campaigns.	 Email Templates HTML-based templates for email messages and campaigns.	 Campaign Offerings Manage your campaign offerings.
 Portfolio Templates Manage your portfolio templates.			



These are separate from Ad Hoc Email templates that can be deployed to organizations, but follow the same formatting settings. You can learn more about how to create an email template [HERE](#).

Launching a Branding Email Campaign

Create a new campaign by clicking **Add** or **Launch New Campaign** at the top of the Email Campaigns grid.

Email Campaigns											
										All	Launch New Campaign >
Page 1 of 1 (11 items)											
⏪ ⏩ 1 ⏴ ⏵											
Add...	Name	Subject	Launch Date	Approved?	Sent At	Organizations	Targeted	Sent	Bounces	Total Opens	
Duplicate Archive	Prospect Test	Calling all prospects!	Tue, Mar 18, 2025	No		0	0	0	0	0	
Duplicate Archive	Proposal Reopen	Proposal Reopen?	Fri, Jan 10, 2025	Yes	1/10/2025 8:11:33 PM	1	8	0	0	0	
Duplicate Archive	test	test	Thu, Jun 27, 2024 at 1:30p	Yes	6/27/2024 12:56:33 PM	1	0	0	0	0	
Duplicate Archive	testing unapproved campaign	testing unapproved campaign	Thu, Jun 27, 2024 at 12:00p	No		1	0				

Select the Audience

- Select the **Contacts** tab to launch a campaign to select contacts in this brand's organizations
- Select the **Users** tab To launch a campaign to this brand's users

Contacts Campaign

- **Recipients:** This type of campaign sends emails to contacts in the organizations within your brand. Select at least one of these groups to target in each organization:
 - Contacts who have been invoice after a set date
 - Contacts who were added as prospects after a set date
 - Contacts with proposals that were open prior to a set date
 - Contacts with a set [Tag](#) in the system
- **Settings:**
 - **Name the Campaign:** Enter a name for your internal reference
 - **Set the Subject Line:** Enter a compelling subject line for your email
 - **(Optional) Schedule the Launch:** Set a date and time in the future to launch the campaign

Recipients

This type of campaign sends emails to contacts in the organizations within the Bob's Handyman Service brand. Select at least one of these groups to target in each organization:

Contacts Customers Invoiced Since

Prospects Since

Proposals Open Prior To

Tags Blue

Settings

Name*

Subject*

Launch Date

Launch Time

Users Campaign

- **Recipients:** This type of campaign sends an email to internal users within your brand.
 - **Organizations:** Filter by the status of the organization - Active, Inactive, or Expired Trials
 - **Roles:** Filter by user role
- **Settings:**
 - **Name the Campaign:** Enter a name for your internal reference
 - **From Name:** The display name of the sender
 - **From Email:** This email address will be displayed as the sender
 - **Set the Subject Line:** Enter a compelling subject line for your email
 - **Schedule the Launch:** Set a date in the future to launch the campaign

Recipients

Organizations Active Inactive Expired Trials

Roles Service Agent - Web User Organization Admin Brand Admin Campaign Provider Admin Dispatch Service Agent - App Owner

Subcontractor Brand Vendor

Settings

Name*

From Name*

From Email*

Subject*

Launch Date*

Click **Continue** in the top right corner.

Select and Customize an Email Theme or Template

- Choose from pre-built email themes or existing templates.
 - When selecting an existing template, you can choose from **brand templates** (created in Dashboard) or the **ad hoc email templates** that were created in the organization you are working from.

Navigation

Select an email theme or existing template below. You will be able to customize your design on the next page.

Themes Existing Templates

Bob's Handyman - Plano

Bob's Handyman Aurora

Bob's Handyman Austin

Bob's Maids - Plano

Not-A-Business LLC

serviceminder.com

Shortcuts

Add a Contact

Schedule an Appointment

My Schedule

Appointment Tracker

Sales Process

Customers

Texting

Store Favorites

Order History

Bob's Handyman Service | Templates **Brand Templates (Dashboard)**

Template 1
Welcome to ServiceMinder

Bob's Handyman Austin | Templates **Org Templates (Control Panel)**

Account Statement Test
View Your Account Statement

CALL TO ACTION
CALL TO ACTION

Couldn't Reach You Text
Couldn't Reach You Text

En Route test
on our way

Fake Marketing Email
Unlock Limitless Potential with just One Click

Inbound Text - Send Email Notification
Inbound Text - Send Email Notification

New Contact Added
A new contact has been added.

Recurring Billing Test
Recurring Billing Test

- Customize the template by adding text, images, and links.
 - Ensure that the email includes an unsubscribe link to comply with regulations: {unsubscribe_url}

Confirm the Campaign Details

- Follow the link to confirm which organizations should be opted in to this email campaign. Uncheck the box for any organization that should not be included in the campaign and click **Save**.
- Review the email subject line
- If you enable **Track Revenue** when launching your campaign, you'll gain access to additional performance insights:
 - **Accepted** – Number of **targeted proposals** that were accepted **after** the campaign was launched (proposal campaigns only).
 - **Proposals** – Total number of **new proposals** generated for recipients **after** the campaign was sent.
 - **Revenue** – Total invoice amount from any proposals that were either targeted by or created for those contacts **after launch**.
- **Test Email Address:** Send a test copy of the email to yourself to preview the formatting.
 - Please note that some shortcodes that generate URLs will not function with this field because they don't have an active contact to pull information from. Non-URL shortcodes will generate random data.
- **Review Launch Date & Time**
- **Publish** your campaign.

Confirm Contacts Campaign

Confirm your settings below and then click Publish! when you are ready to commit this campaign for launching. Organizations will have till the launch date to opt out.

Settings

Organizations [Review 2 organizations...](#)

Email Subject*

Track Revenue?

Test Email Address [Send Test](#)

Launch Date

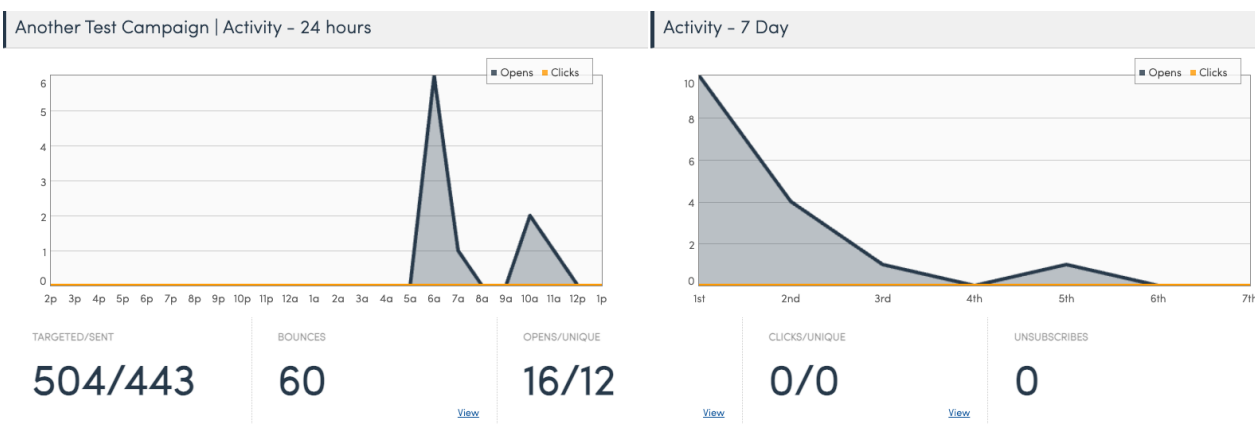
Launch Time

Publish!

Save

Branding Campaign Reporting

Above the list of Email Campaigns, you will see two graphs that pull data from the first 24 hours and first 7 days of the most recent campaign.



Below the graphs, various statistics are presented about that campaign:

- **Targeted/Sent:** The first number shows how many people were targeted by the campaign. The second shows how many unique emails were successfully delivered to inboxes.
- **Bounces:** The number of emails that couldn't be delivered.
- **Opens / Unique Opens:** Total email opens, including multiple opens by the same person, followed by the number of individuals who opened the email at least once.
- **Clicks / Unique Clicks:** Total clicks on any links in the email (including repeat clicks by the same person), followed by the number of unique individuals who clicked at least once.
- **Unsubscribes:** The number of recipients who clicked the unsubscribe link.

The table displays the same statistics listed above for all previous campaigns. It can be toggled to show **All** campaigns (including archived ones) or only **Unarchived** campaigns using the button in the top right corner.

