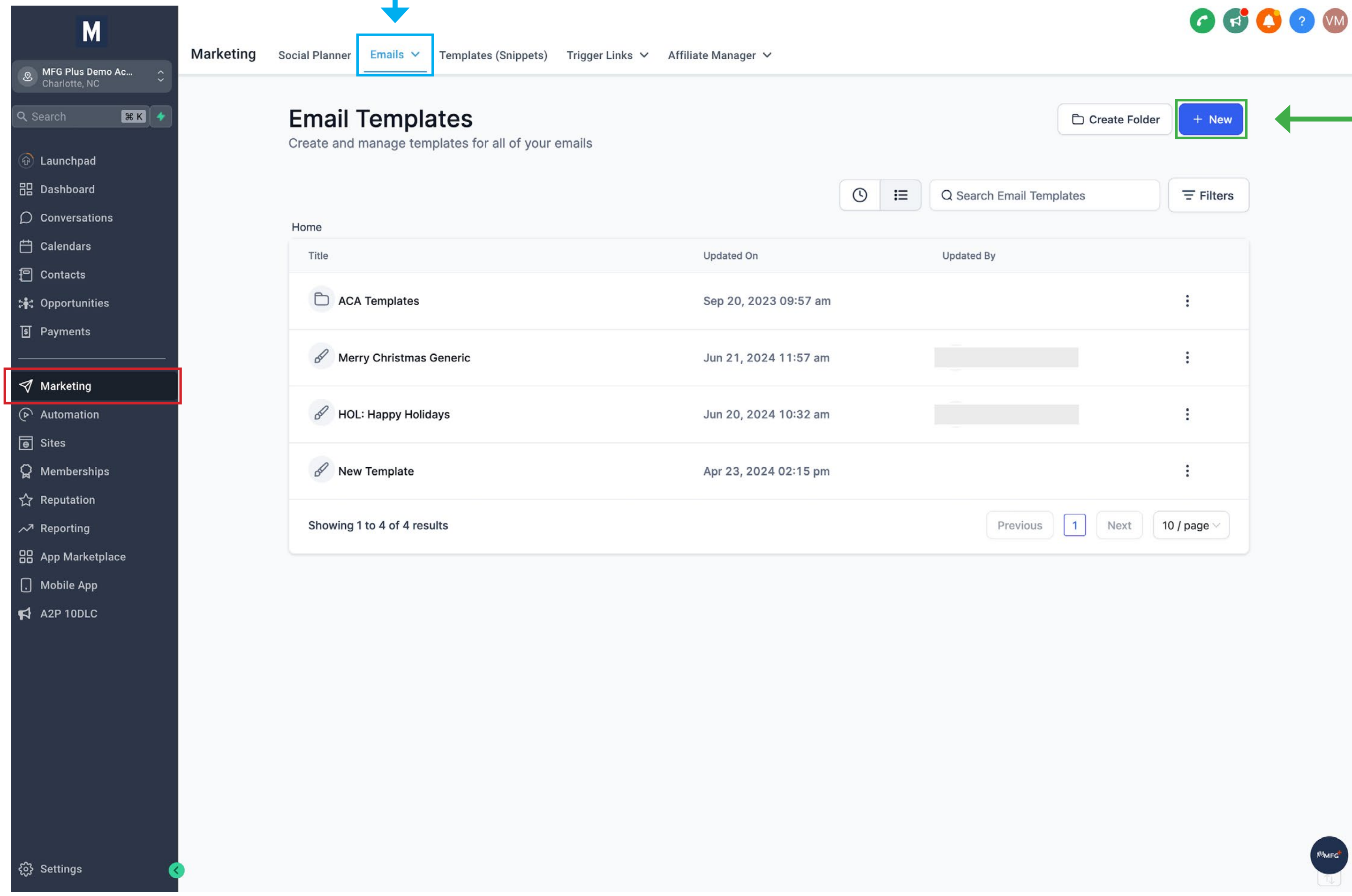
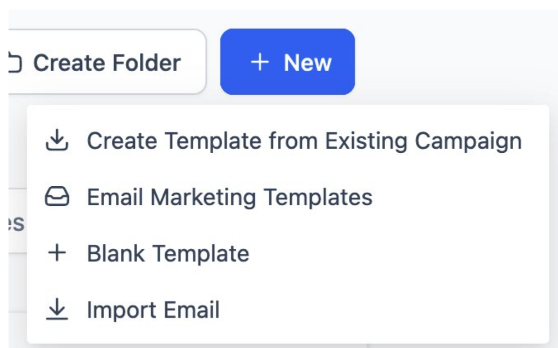
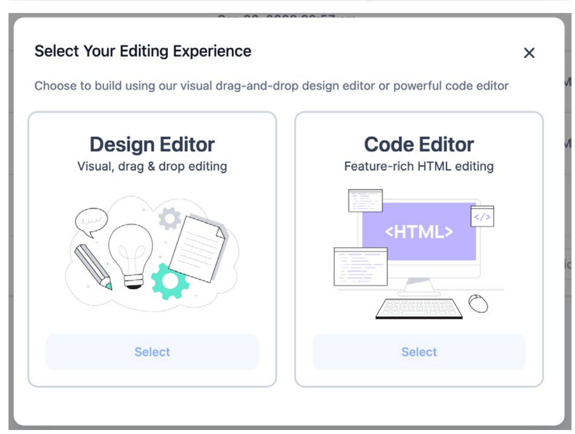
How to Bulk Email Contacts

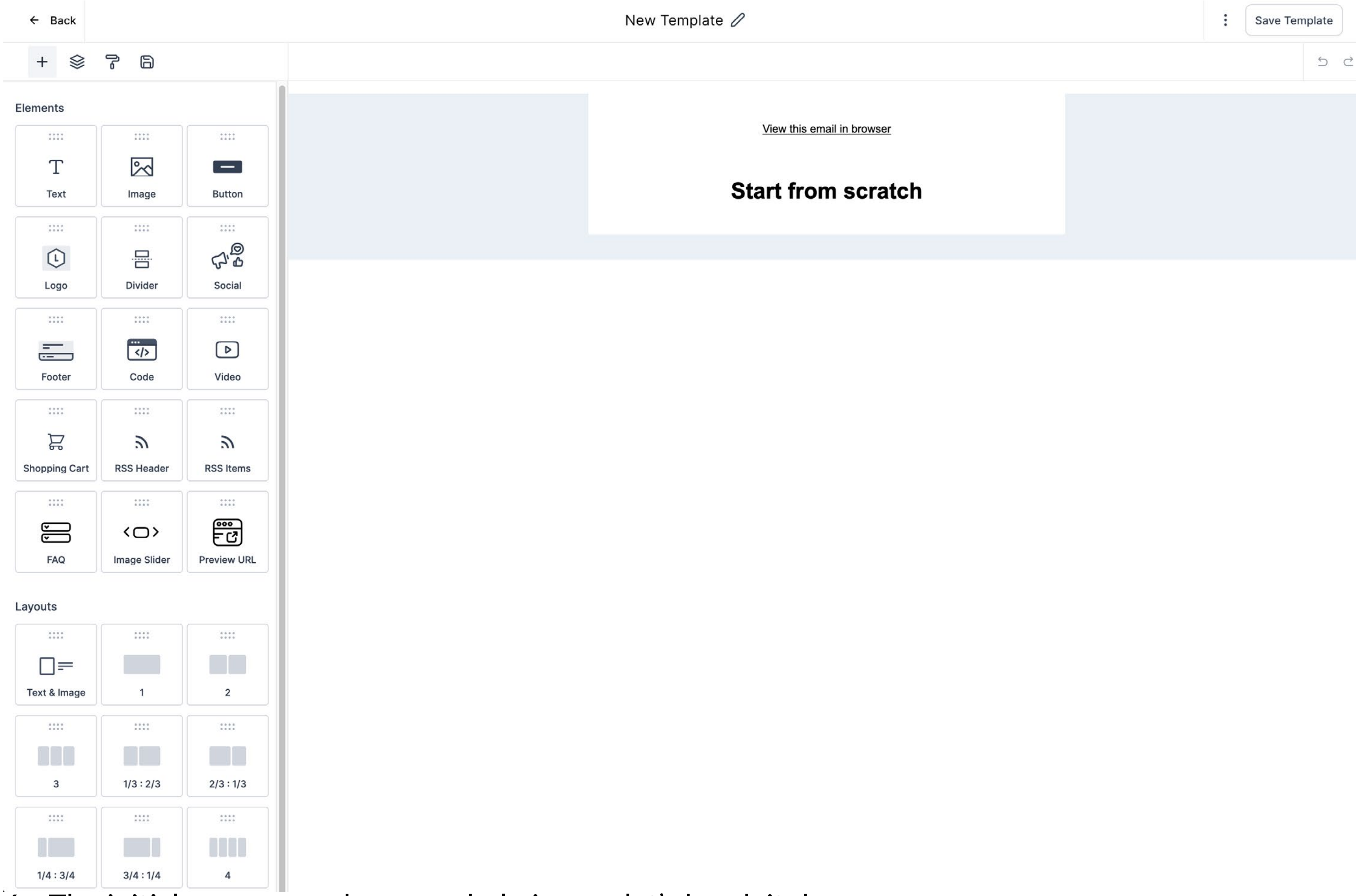




1. Navigate to the **Marketing** section (highlighted above in red).
2. Open the **Emails** tab and select **Templates** (highlighted above in blue).
3. Click the **+ New** button (highlighted above in green)
4. Select an option. You can:
   a. **Create Template from Existing Campaign**: Create a template based on an existing email.
   b. **Email Marketing Templates**: Use a template created by other users. You will be able to select from a searchable list of pre-made email templates.
   c. **Blank Template:** Create a new template from scratch.
   d. **Import Email:** Import an email that you've created in Mailchimp, Active Campaign, or Kajabi. Follow the instructions shown for the selected option.



5. In this tutorial, we will show how to work from a blank template in the **Design Editor**. You can use the skills learned by creating an email from scratch to edit the pre-made templates.

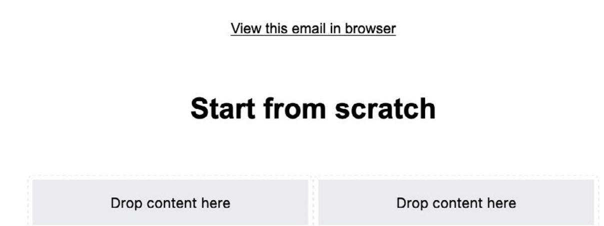


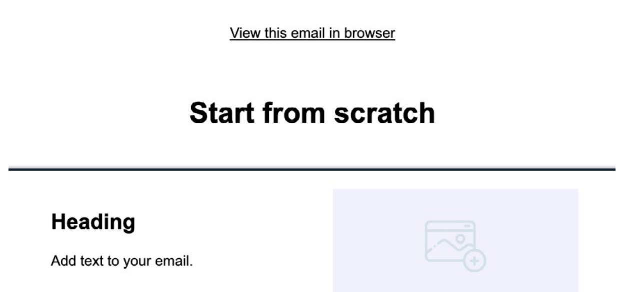
6. The initial screen may be overwhelming, so let's break it down.

   a. On the left are things you can add to your email, and on the right is the email itself.

   b. The left has four tabs. Add Element, Manage Element, Appearance, and Saved Items. When working on your email, these tabs will often be automatically selected.

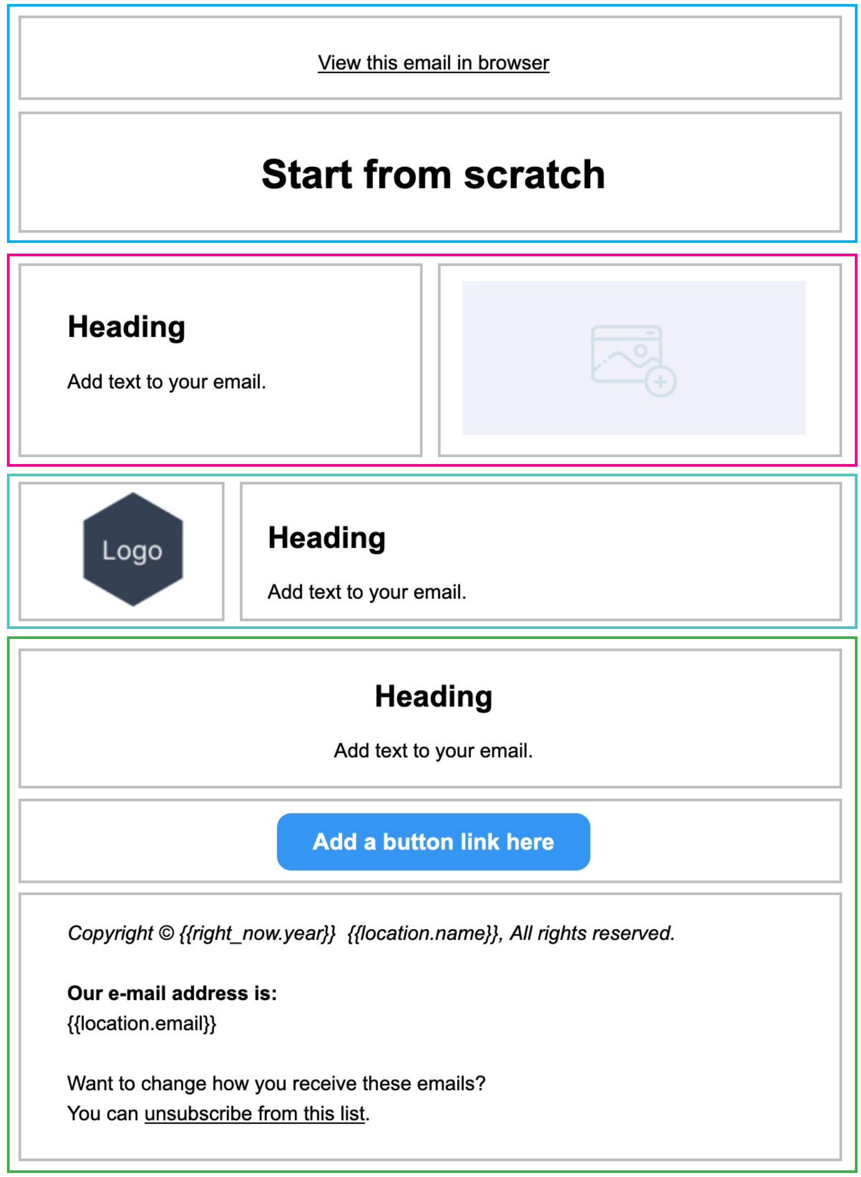
   c. Add Element is the most important tab. Here, you can drag and drop pieces into your email. Elements include things like text boxes, buttons, and images. Layouts are what you use to create the frame of your email. By default, elements will be full-width in the email. To create columns, add a layout item, and then add elements inside of the columns you've created. To the right is an example of what a two-column layout looks like before and after you add elements.



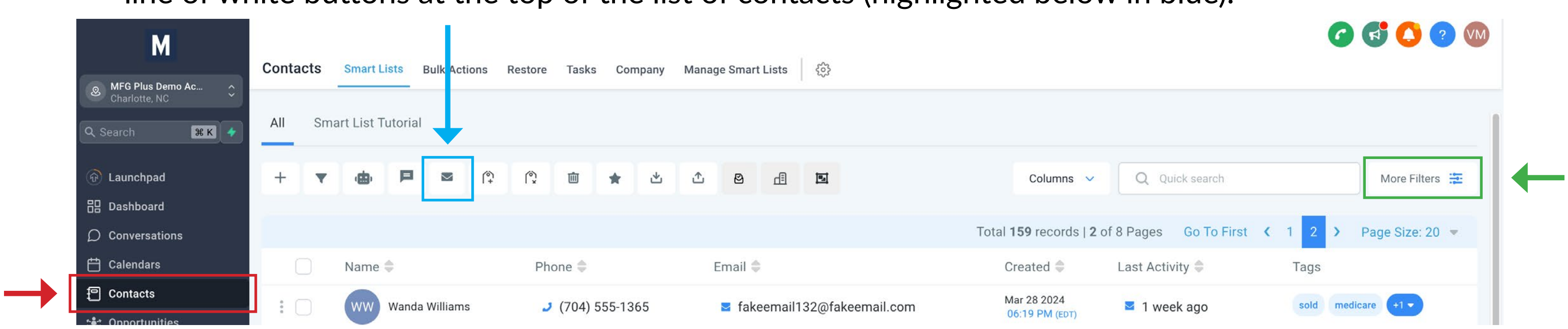


   d. When you select an element, that element's properties and options will appear on the left. This is where you can edit the individual items. You can edit the background color of your email by selecting a full row and setting the color there. Continue to the next page to view an example email.

7. This email breaks down like so:
    a. Row 1, Blue: A preview URL and a text box inside a single-column layout.
    b. Row 2, Pink: A text box and an image inside of a two-column layout.
    c. Row 3, Teal: A logo and a text box inside of a 1/4 : 3/4 layout.
    d. Row 4, Green: A text box, a button, and a footer inside of a single column layout.



8. When you're done, name the template by clicking in the top middle, where it says "New Template," and type something you will remember. Then save your email by clicking "Save Template" in the top right.
9. Now it's time to send your email. Navigate to the **Contacts** tab (highlighted below in red).
10. You'll need to select the contacts you want to email before you can send. This can be done in any of three ways:
    a. **Manually** - Individually select the contacts you want to email using the checkbox to the left of their name.
    b. **Bulk** - Bulk select all the contacts on a page by using the checkbox to the left of the "Name" column. To select all available contacts, use the checkbox and then click "Select all [xyz] records."
    c. **Filtered** - Click **More Filters** in the top right (highlighted below in green). Apply filters as needed, then return to the contacts screen. Use the bulk select checkbox to the left of the "Name" column, then click "Select all [xyz] records."
11. Once you've selected the contacts, click the "Send Email" button. It's a small envelope, fifth in the line of white buttons at the top of the list of contacts (highlighted below in blue).



12. You will now see a pop-up. This screen means larger lists of contacts take a longer time. Small lists take less time. Click “Ok, proceed.”

13. In “Email Templates,” select the template you would like to use, if applicable.

14. In “From” type your name or your agency name.

15. In “From email” type the email address you would like contacts to receive the email from. Make sure it’s an email you have connected to Plus to avoid any missed replies.

16. In “Email Subject” type your subject if it wasn’t already filled by a template.

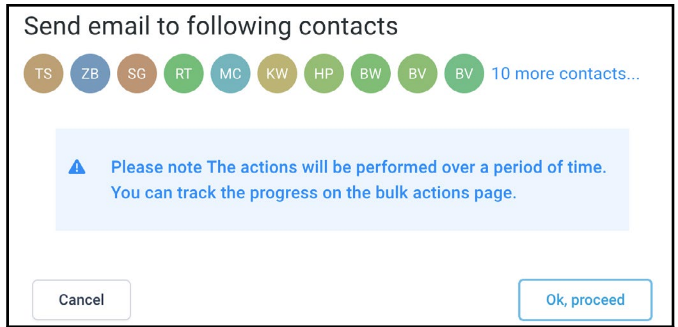
17. You can create a simple email in the textbox if you aren’t using a template. It is advised to use a template even for simple emails when you’re emailing in bulk, to avoid accidents.

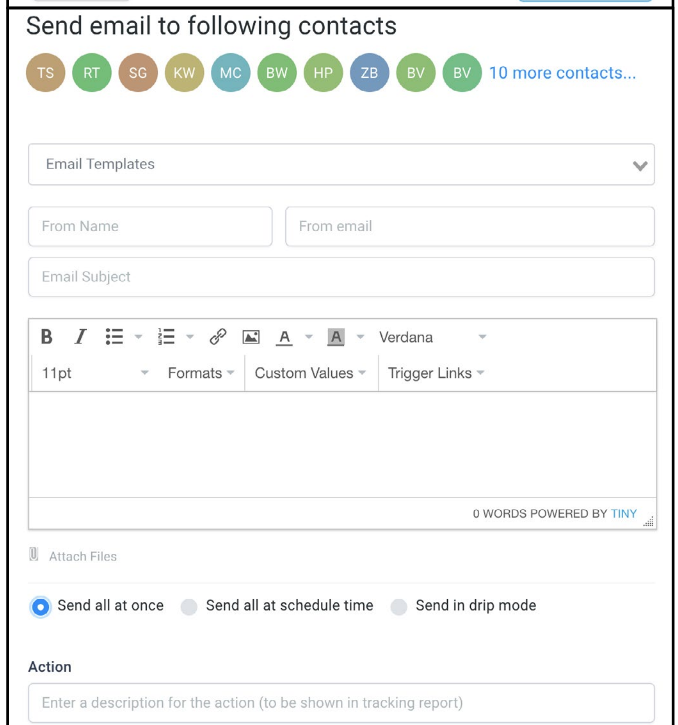
18. You now have three ways to add the contacts.

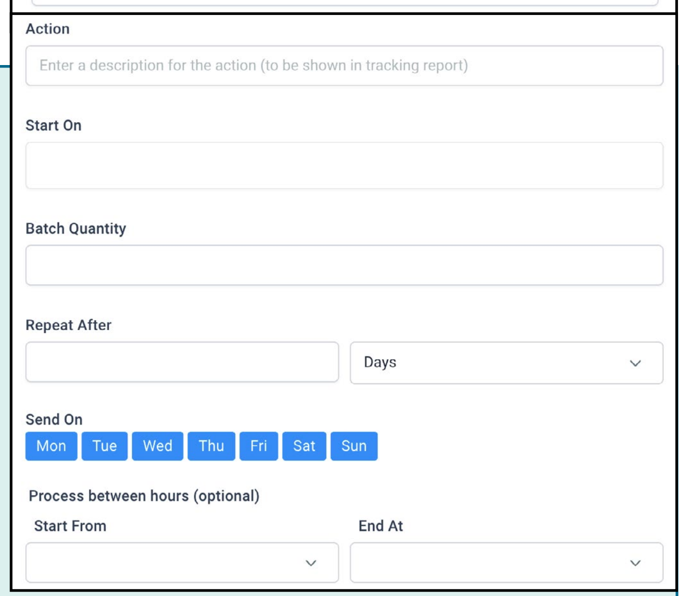
    a. **Send all at once** - Immediately emails all selected contacts at the same time.

    b. **Send all at scheduled time** - Emails all selected contacts at a specified time in the future.

    c. **Send in drip mode** - Allows you to email the contacts in batches. See below:







Action: Give a short description of what you’re doing, such as “Bulk add to XYZ email template”

Start On: Select a specific date and time to start the drip

Batch Quantity: Set how many contacts to email in each group

Repeat After: How often a batch of contacts will be emailed. Type a number in the “Repeat After” bar, then select if the number corresponds to every ## of days, hours, minutes, or seconds.

Send On: What days the contacts are allowed to be emailed on. By default, all of the days are selected. Deselect a day to keep contacts from being emailed on that day.

Process between hours (optional): What time of day the contacts can be emailed.

Here’s an example. Settings: Start On: 05/05/20xx | Batch Quantity: 5 | Repeat After: 5 Days | Send On: Mon, Tue, Wed, Thu, Fri | Process between hours: Start From 10AM, End At 2PM

Result: Beginning on 05/05/20xx, 5 contacts are emailed every 5 days. If the 5th day falls on a Sunday or Saturday, the drip will wait until Monday to continue. Contacts will be emailed at 10AM and cut off at 2PM. If it doesn’t finish by 2pm, it will save the leftover contacts for the next batch.

7. Once you’ve chosen your settings, click “Send Email.” To view progress, click the link or go to the Bulk Actions tab in the Contacts section.