

Symphony

Event Management

Using the new drag and drop email editor





Introduction

Symphony has introduced a new email editing tool to help make the process of creating attractive, informative emails easier for you. We know that not everyone knows the ins and out of HTML and CSS, – which becomes more complicated when developing emails! - so we've taken that burden off your shoulders and have integrated with an email editor from Unlayer (<https://unlayer.com/>); a specialised email editing tool for SaaS systems like Symphony.

The editor has been installed into the two main email modules in Symphony: Campaign Emails and Triggered Emails. It has all the great features of our original email editor, but with a much more user-friendly interface and easy to use functionality. Don't worry, if you want to use the original editor, all you need to do is select '**Use HTML editor**' from the template select screen during the setup of a new campaign, or triggered, email.

All emails created before this update will use the original HTML editor. The new editor comes into effect on new emails only.



Where is the new email editor?

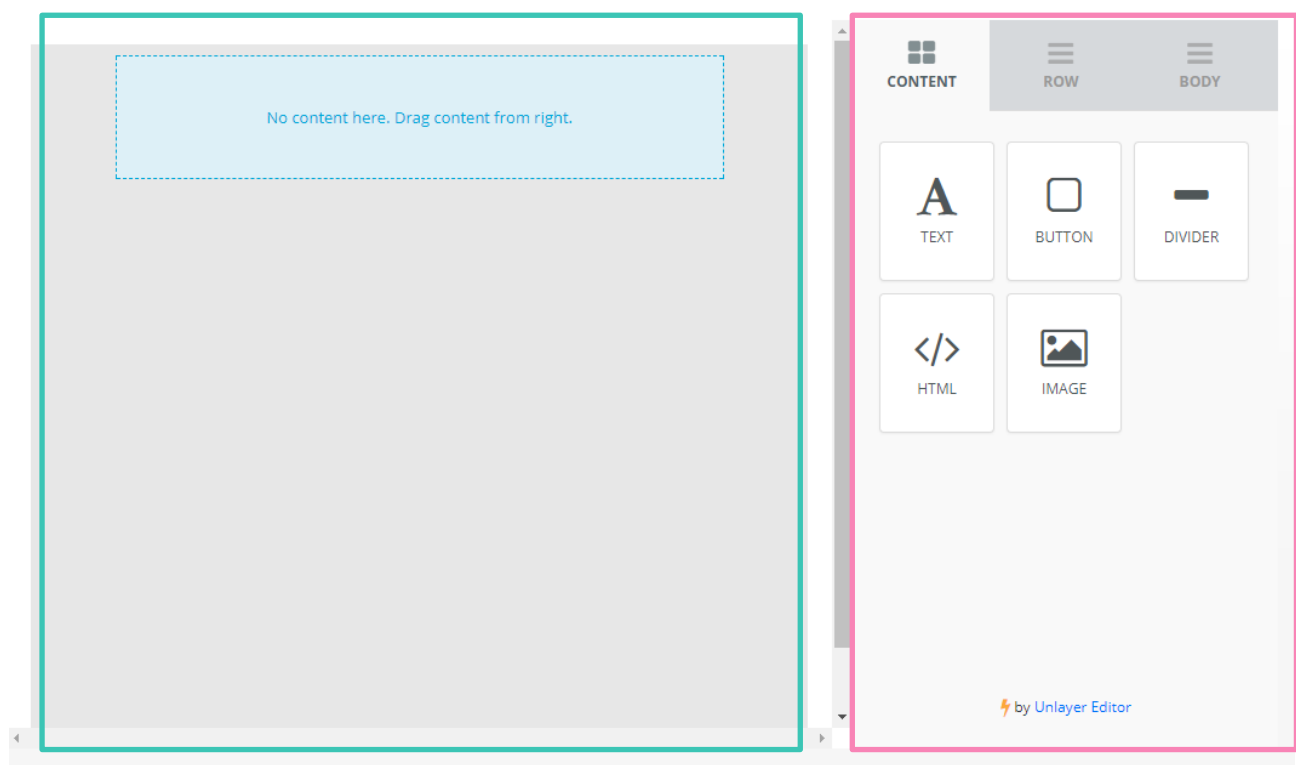
The new email editor is available on the two email modules in Symphony: Campaign Emails and Triggered Emails. To use the new editor on your subsequent emails, you will need to choose **'Use Easy Editor'** when creating each email.

*Unfortunately, due to the inner workings of the editor we have installed. The options **'HTML import'** and **'Copy from a previous campaign'** are not available for the new editor.*

Creating Emails in The New Email Editor

We know that creating emails can be tedious – and sometimes daunting - work, so we have created an array of templates for you to start from. You can also start from a blank template if you would like to create your own email from scratch.

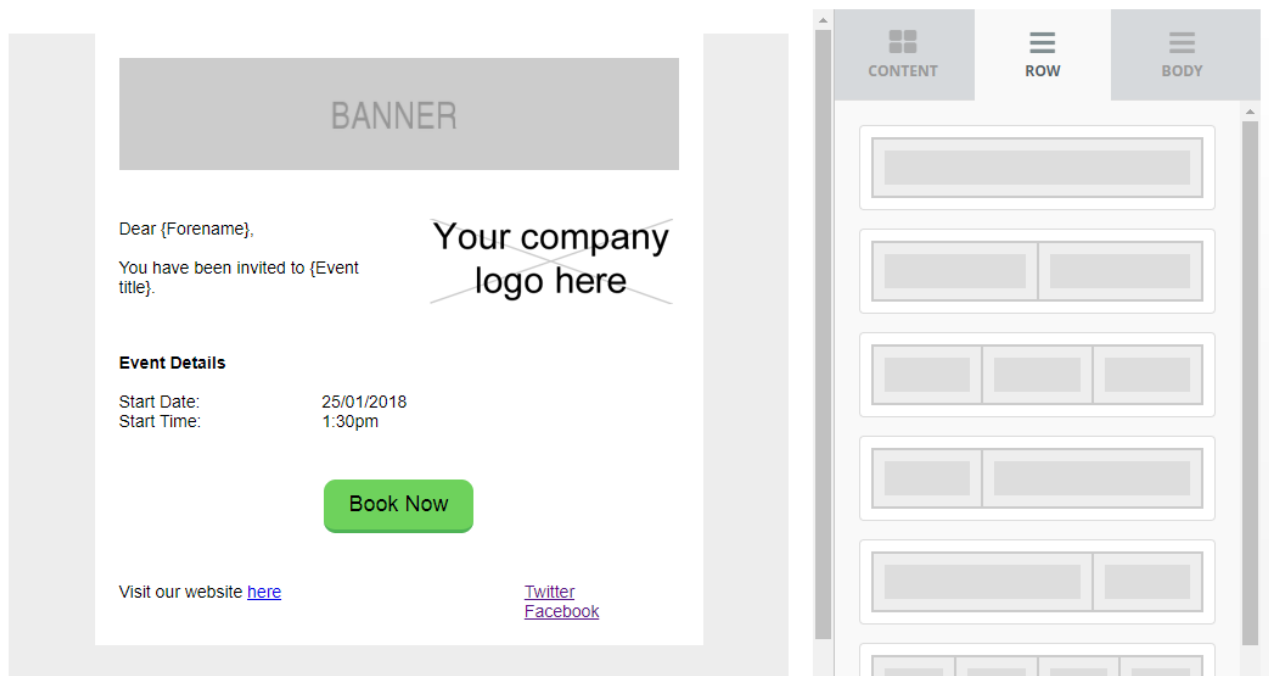
The editor should look something like the following (if you have selected 'blank template'):



- The area highlighted by the **green box** is the content area. This is where you will place all your different pieces of content that form the email.
- The second area on the right-hand side highlighted by the **pink box** is the content selection area. This is where you can choose the content you want to add to your email. As you can see from the screenshot there are three main sections: Content, Row and Body.
 - The Content section holds the individual pieces of the email you want to add, so you can add: text, a navigation button, a section divider, some custom HTML or an image.

- The Row section lets you easily separate out and modularise the email itself. This is what will originally be achieved by custom CSS in the original editor. It allows you to add different numbers of columns per row and is the basis for adding content to your email.
- The Body section contains the background colour, content width and font family.

The screenshot below demonstrates how the Row section can be used to add different areas of content to your email. Separating out pieces of text, for example, the third row might contain booking details like net cost, group size or attendee address – whereas, the first row might contain a header image.

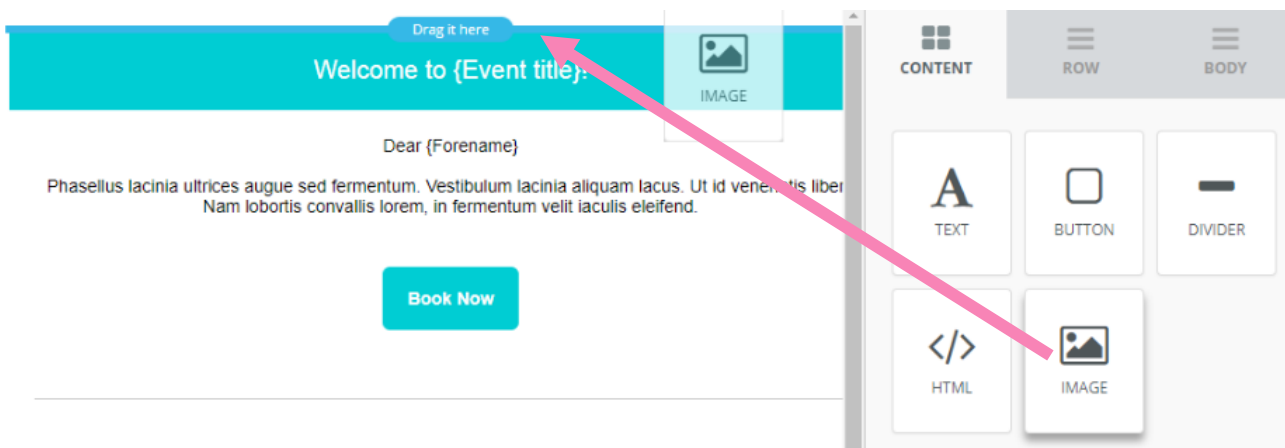


Worried about branding?

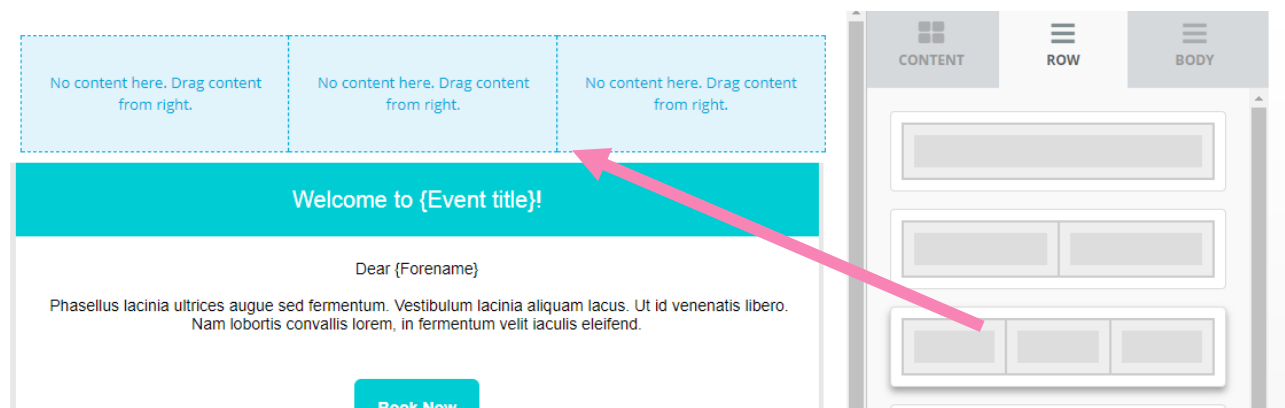
Don't be. This email editor has you covered; you are free to change text colour, background colour, add images, lists, URLs and any other styling alterations you wish to make.

Adding images to your emails

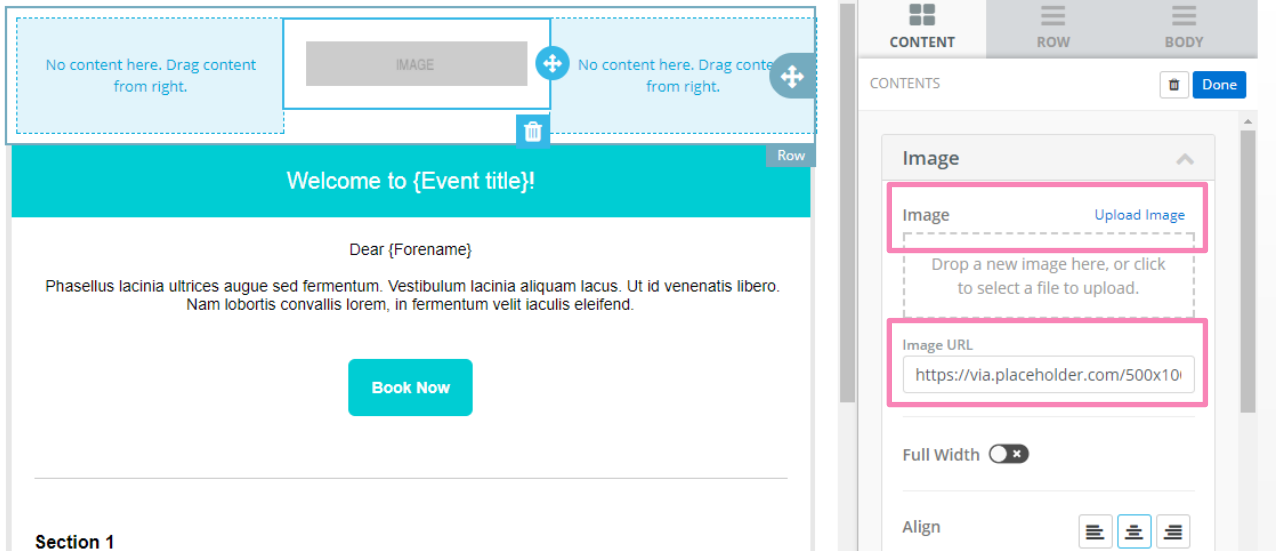
Adding images to your emails is easier than ever in this editor. Click the 'Content' tab and simply drag the 'Image' icon into position on your email.



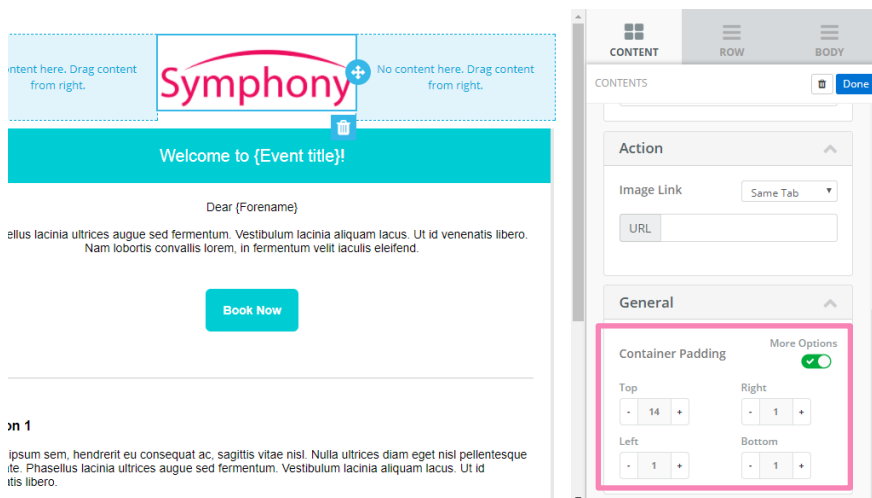
If you want your image to take up a section of a row, one third for example, use the 'Row' tab and insert a row of three boxes first. Simply drag-and-drop the row you want into place on the email.



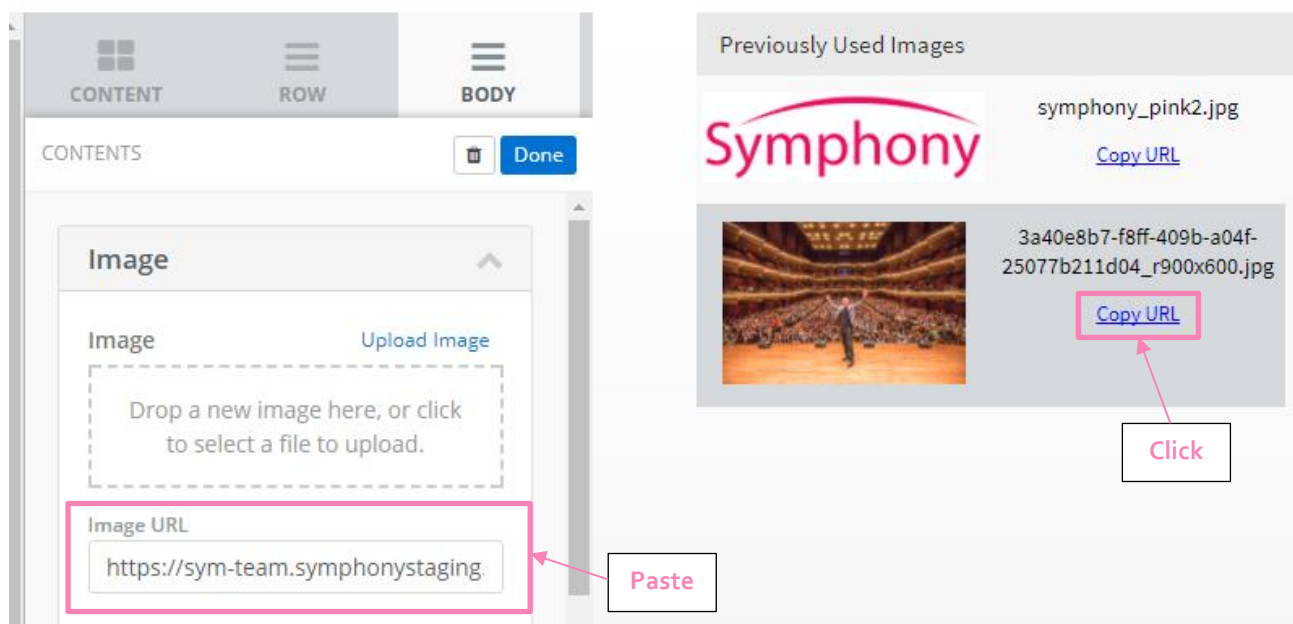
Once you have dragged the image icon into position, a placeholder graphic should appear. To upload an image of your own to use, click on this placeholder and use the 'Upload image' button that appears on the right-side menu. You can also place an image URL directly in the Image URL box if you already have an image uploaded elsewhere.



Now that your image is in place, it's time for some adjustments. Use the scrollbar on the right-side menu to explore options available to you to adjust the formatting and properties of the image you have just placed. For example, I have added 14px of padding to the top of the image to make it appear in the middle of the row.



Once you start uploading images through the editor, a list will begin to grow on the right side of the page. This contains all the images that have been previously uploaded through this email editor. If you would like to reuse images you have uploaded in the past, simply find it in the list, click the 'copy URL' text and paste that into the 'Image URL' box when you have added an image to your page.

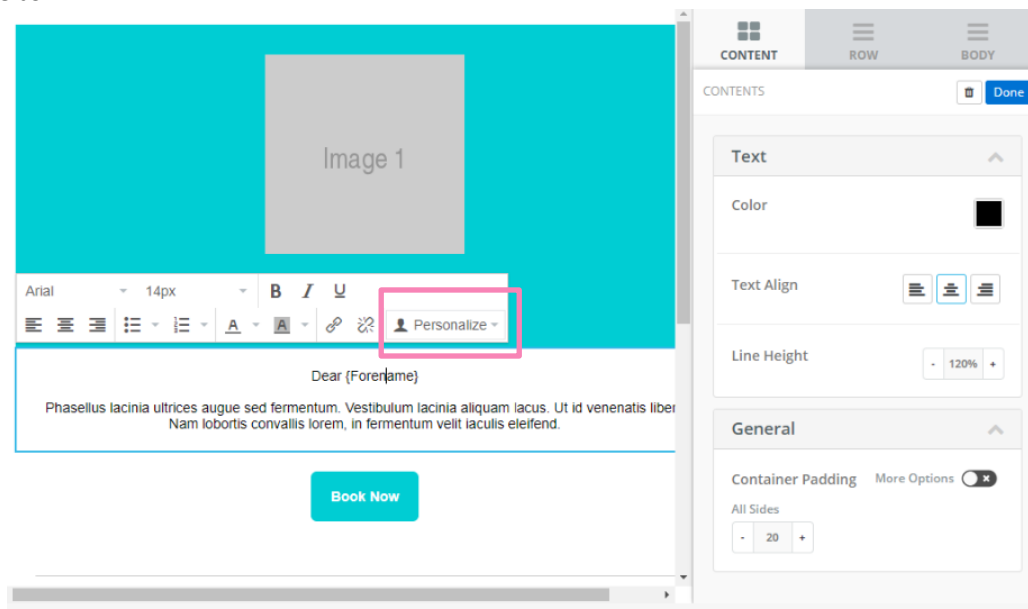


Do not drag the image into place, this will not insert the image into your email. Click the 'Copy URL' link, this will allow you to paste the link directly into the 'Image URL' box.

Recipient/Attendee Content – Merge tags/fields

A major part of emailing potential delegates is customising the content to greet them personally, by name or with other information to help them book. Symphony has merge fields that will be replaced by attendee/recipient content when the email is sent. The merge fields available on the original HTML email editor are all available on the new editor too.

To add merge fields using the editor, simply click on the area of text you wish to add the merge field. This will open a small popup with formatting options, click on the 'Personalize' button and you will be provided with a dropdown list of all merge tags available on that email type. Note: Campaign Emails and Triggered Emails do not share identical merge fields.



Tip: Symphony allows you to test your campaign and triggered emails before you send. So, make sure to do so! It's always useful to see what the email looks like in email clients like Microsoft Outlook and Gmail.

FAQs

1. Will this new editor effect the deliverability of the emails?

- a. Nope! All the editor does is create the HTML for your email in a concise, easy to use way. The HTML code behind the email won't look too different to many other emails, but is simply, easier to produce.

2. Can old emails already on the Symphony system be used/use the new editor?

- a. No. Because of the way the editor works behind the scenes, it needs a little more information than just the HTML the emails produced by our old editor produce. This also means that you will not be able to paste in HTML that you have generated elsewhere, or content you have created in Microsoft Word and want to paste in.

3. Can I switch between the two editors on the same email?

- a. No. For the same reason as above, it's not possible to use the different editors on the same email.

4. Can I upload a template email to be used for future emails?

- a. Yes. Our Support Team will need to handle this query for you as a developer will be required to create and upload the template for you. A small fee will be incurred in order to pay for this process. If you would like a template uploaded for you, you will need to supply the following information

(fields marked with * are mandatory):

- i. Template Name
- ii. Email Type * (Campaign Email/Triggered Email)
- iii. CampaignEmailType * (Invite, Follow Up, Post Event or All)
- iv. The HTML of the template * (this is required, we will not be able to create a template for you without this)
- v. Screenshots of the email as it would appear in an email



