



# Marketing Guide

September 2020

# Table of Contents

<b>UNBOUND PRODUCT SUITE GENERAL OVERVIEW</b>	<b>9</b>
<b>UNBOUND MARKETING OVERVIEW</b>	<b>9</b>
<b>Navigating the Marketing Dashboard</b>	<b>9</b>
Audience Lists, Flows, Campaigns, Forms, and Landing Pages	9
Other dashboard features	12
Recent Email Campaigns	13
Top Audience Lists	15
Activity Calendar	15
Activity Performance	16
<b>NAVIGATING MARKETING</b>	<b>16</b>
<b>Campaigns</b>	<b>17</b>
Email Campaigns	17
Add an Email Campaign Group	18
Edit an Email Campaign Group	18
Delete an Email Campaign Group	19
Add a new email campaign	19
Email Details page	19
Edit in Email Editor	22
<i>[Related: Add an Autoresponder]</i>	22
Options for creating and editing in Email Editor	22
Sample templates in Email Editor	25
Create content and insert text in Email Editor	27
Content	28
Content Type	29
Sample combinations of templates and content types	30
Text only	35
Content Type options	39
Freeform Content Type	40
2 Col Features Content type	41
4 Col Promos Content type	45
Accordion Item Content Type	48
Banner Content Type	50
Blog Post Content Type	53
Content Slider Panel Content Type	54
Email – Content Block Content Type	55
Email – Content Block 1x2 Type	57
Email – Content Block 1x3 Type	58
Email – Hero Image Content Type	60
	1

Email – Image Aligned Content Type	61
Feature Block Type	63
Feature Block 1x2, 1x3, 1x4 and Feature Block 5 Types	65
For each Feature Block (1x2, 1x3, 1x4 and 5)	67
Feature Slide Type	70
Gallery Image Type	72
Location type	73
Main Slider Panel	74
News Type	76
Social Feed Item Type	77
Social Share Type	79
Spotlight Type	80
Tab Item Type	82
Video Type	83
Edit an Email Campaign	86
Delete an Email Campaign	86
Use the More Menu	87
Move Campaign to another group	87
Duplicate Email Campaign	88
Submit for Distribution	89
Using the Rich Text Editor in the Email Editor	90
Select and insert an image in the Email Editor	92
Automation Flows	96
Manage Automation Flow Groups and Flows	96
Add a Flow Group	97
Edit a Flow Group	98
Delete a Flow Group	98
Add a new automation flow	98
The Flow Editor	99
Flow Actions	101
Action: [If] Email Sent	101
Action: [If] Email Opened	103
Action: [If] Form Submitted	104
Action: [If] Lead Score Reached	105
Action: [If] Link (Tracked) Clicked	105
Action: [If] Link (Tracked) Clicked	106
Action: [If] External Page Viewed	107
Action: [If] File Downloaded	108
Action: [If] Sign In Completed	109
Action: [If] Registration Completed	110
Action: [If] User Opted In for Emails	110
Action: [If] User Added to Static List	110
Action: [If] User in Audience List	111
Save, Activate, or Deactivate Flow Options	112
Flow Reactions	112
Reaction: [Then] Send Email	112

Reaction: [Then] Send Internal Notification	114
Reaction: [Then] Assign Contact Attribute	114
Reaction: [Then] Assign Lead Points	115
Reaction: [Then] Add to Static List	115
Reaction: [Then] Remove from Static List	116
Reaction: [Then] End Flow	116
Reaction: [Then] Notify Contact Owner	116
Reaction: [Then] Trigger Conversion	117
Reaction: [Then] Time Delay	117
<b>Contacts</b>	<b>118</b>
Manage Contacts	118
Add a new contact	119
General Details	120
Properties	120
Attributes	122
Audience Lists	123
Demographics	124
Emails Received and Recent Activity	126
Edit a contact	126
Delete a contact	127
Manage Audience Lists	127
Audience List Groups	127
Add an Audience list Group	128
Edit an Audience list Group	128
Delete an Audience Group	129
Create Audience Lists	129
Add an Audience List	129
Details	129
Filters	130
Edit an Audience List	132
Delete an Audience List	132
Other options	133
Manage Subscriptions	134
Select Contacts	135
Upload CSV of Email Addresses	135
Unsubscribed email addresses	136
Import Contacts	136
Select Data Source	137
Upload CSV file	137
Salesforce Contacts	137
Salesforce Leads	137
Map Fields	138
Preview	138
Define Audience Lists and View Results	138
<b>Assets</b>	<b>139</b>

Automation Flow Emails	140
Add an Email Group	140
Edit an Email Group	141
Delete an Email Group	141
Add a new Email	142
Email Actions	143
Edit an Email	144
Delete an Email	145
Forms	145
Add a Forms category	146
Edit a Forms category	146
Delete a Forms category	147
Add a new form	147
Lead form	148
Details	148
Available Fields	148
Generic Fields	148
Contact Properties	149
Form Definition	150
Properties	150
Form Options	151
More form options	152
Duplicate Form	152
Move Form	153
Form Embed Code	154
View Responses	154
View Leads	155
Download Lead Report	157
Landing Pages	157
Create a Landing Page	157
Tags	159
Other Page options	159
SEO Properties	160
Security & Settings	160
Security Levels	160
Custom Styles	162
Custom Scripts	163
Distribution Targets	163
Search	164
Attributes	164
More options	166
Edit a page	166
Delete a page	166
The More menu	167
Publish	167
Manage Tracking Codes	167

Manage Language Variants	169
External Landing Pages	170
Create an External Landing Page	170
Edit an External Landing Page	171
Delete an External Landing Page	171
Links	171
Add a Link Group	172
Edit a Link Group	172
Delete a Link Group	172
Add a Link	173
Edit a Link	173
Delete a Link	174
Content Library	174
Navigating your Content Library	174
Manage Content categories	174
Add a content category	175
Edit a content category	175
Delete a content category	175
Reorder contents	175
Manage content items	176
Add New Content	176
Content Library: Content Type options	178
Free Form Content Type	178
2 Col Features Content type	180
4 Col Promos Content type	182
Accordion Item Content Type	184
Banner Content Type	185
Blog Post Content Type	187
Content Slider Panel Content Type	188
Email Content Types	189
Email – Content Block Content Type	189
Email – Content Block 1x2 Type	190
Email – Content Block 1x3 Type	191
Email – Hero Image Content Type	193
Email – Image Aligned Content Type	193
Feature Block Type	195
Feature Block 1x2, 1x3, 1x4 and Feature Block 5 Types	196
For each Feature Block (1x2, 1x3, 1x4 and 5)	198
Feature Slide Type	199
Gallery Image Type	200
Location type	201
Main Slider Panel	203
News Type	204
Social Feed Item Type	205
Social Share Type	206
Spotlight Type	207

Tab Item Type	209
Video Type	209
Using the Rich Text Editor	211
Select and insert an image	212
Add and insert a new image	215
Single Image	216
Multiple Images	219
Options	220
Edit Content	220
Delete Content	221
More	222
Archive	223
Move Content	223
Assign Tags	224
View pages using this content	225
Submit for Translation	226
View Translation Status	227
Image Library	227
Navigating your Image Library	228
Manage the Images Menu	228
Add an Image menu	229
Edit an Image menu	230
Delete an Image menu	230
Reorder an Image menu	230
Manage Images	232
Add New Image	232
Single Image	232
Multiple Images	236
Edit an Image	237
Delete an image	238
Use the More menu	239
Download Image	239
View pages using this image	239
View History	240
About Image	240
File Library	241
Navigating your File Library	241
Manage file categories	241
Add a Files and Media category	242
Edit a Files and Media category	243
Delete a Files and Media category	243
Other options	244
Manage your files	245
Add a file	245
Single file	246
Multiple files	247

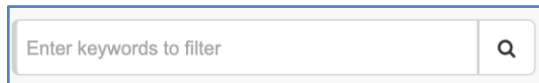
File options	248
Edit a file	248
Delete a file	249
More Options	250
Move File	250
Download file	252
View pages using this file	252
View History	252
About File	253
Attributes	253
Navigating Attributes	253
Manage Attribute categories	253
Add an Attribute category	254
Edit an Attribute category	255
Delete an Attribute category	255
Manage Attributes	256
Add an Attribute	256
Edit an Attribute	258
Delete an Attribute	259
More Attribute options	259
Submit for Translation	259
View Translation Status	260
<b>Administration</b>	<b>260</b>
<b>Administration – Users &amp; Groups</b>	<b>261</b>
Marketing Groups	261
Add a new Marketing Group	262
Edit a Marketing Group	263
Delete a Marketing Group	264
Activate/Deactivate Marketing Group	264
Marketing Users	265
Add a new Marketing User	267
Edit Marketing User	269
Delete Marketing User	269
Activate/Deactivate Marketing User	270
<b>Administration – Site Functions</b>	<b>270</b>
Manage Sites	270
Add a new site	270
Options for a new Variant Site	271
Settings	271
Import Options	272
Attributes	272
Demographics	273
Edit a site	274
Delete a site	275

More options	276
Tracking Codes	276
Move Site	277
Submit for Translation	277
Manage Site Lists	278
Add a Site list	279
Edit a Site list	282
Delete a Site list	282
Distribution Activity	283
Attention Required	284
Ready for Distribution	284
In Progress & Completed	284
Legacy Autoresponders	285
Add an autoresponder	285
Insert Dynamic Token	286
<b>For Developers</b>	<b>289</b>
Add an Email Template category	290
Edit an Email Template category	290
Delete an Email Template category	290
Add an Email template	291
Edit an Email Template	293
Delete an Email Template	293
Email Template More Menu	294
Content Types	294
Add a content type category	295
Edit a content type category	295
Delete a content type category	295
Add a content type	296
Edit a Content Type	297
Delete a Content Type	297
Salesforce Configurations	298
Developer Configurations	298
Edit a Developer Configuration	299
Email Opt-in	300
Email unsubscribe	301

## Unbound Product Suite General Overview

Bridgeline Unbound is web-based, internet-connected, with no need to download software.

- All Unbound modules use the same dashboard setup for navigation and general functionality. Knowing one tool helps you to understand how to use them all. For example, all Unbound **Commerce** product pages and information are fully integrated into Unbound **Content**, and much of Unbound Content is integrated with Unbound **Marketing**.
- In most of Bridgeline Unbound, you can find your way easily by using the Filter bar.

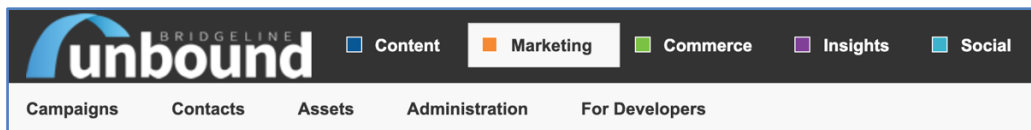


## Unbound Marketing Overview

Unbound Marketing is the simple but functionally-rich system for managing campaigns, landing pages, forms, automation flows, and contact management – along with other dynamic and efficient marketing solutions.

### Navigating the Marketing Dashboard

- On the Unbound products menu at the top of the screen, select **Marketing**.
- In the sub-menu under the Unbound banner, you will see you have the option of selecting the categories **Campaigns**, **Contacts**, **Assets**, **Administration** and **For Developers**.



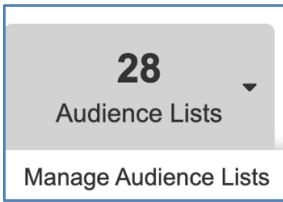
### Audience Lists, Flows, Campaigns, Forms, and Landing Pages

You will see another menu under the Unbound banner sub-menu. This menu gives you an immediate view of your most recent marketing information and functionality. It also provides you with a quick way to access and use key features.

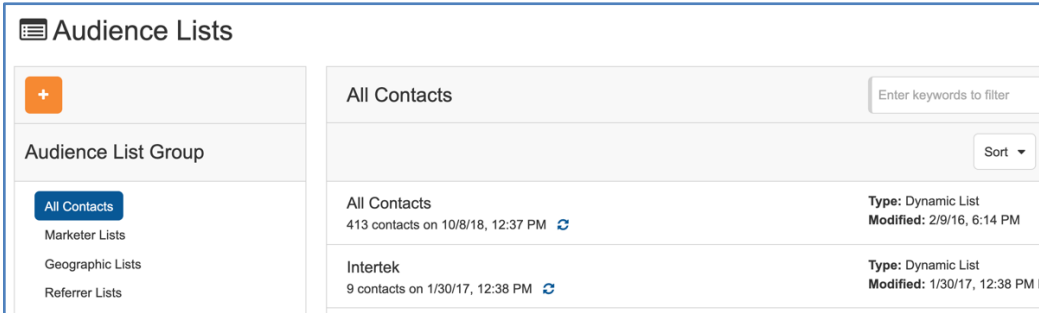


Click the arrow beside each feature in order to manage it.

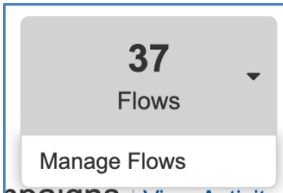
- When you click the arrow beside Audience Lists, and then **Manage Audience Lists**,



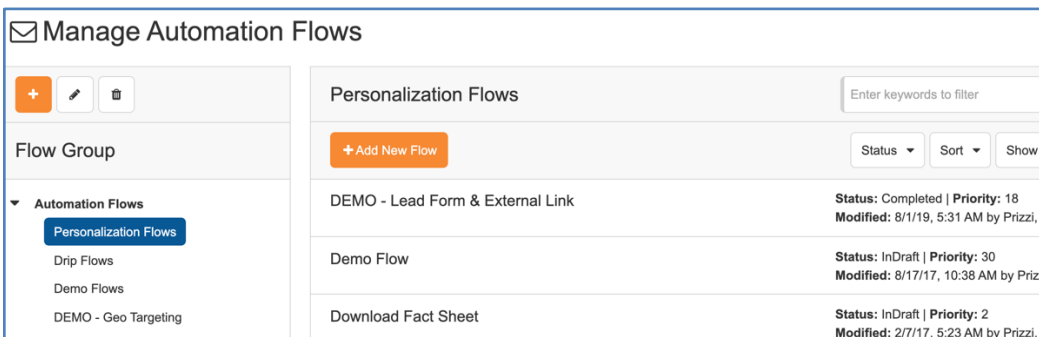
the Audience Lists page appears.



- When you click the arrow beside Flows, and then **Manage Flows**,



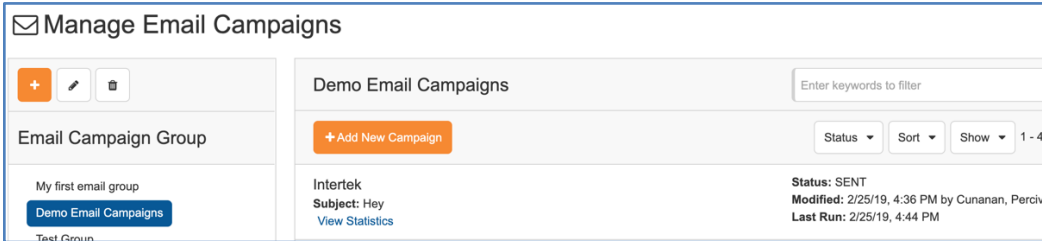
the Manage Automation Flows page appears.



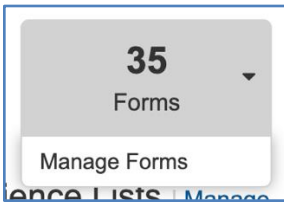
- When you click the arrow beside Campaigns, and then **Manage Email Campaigns**,



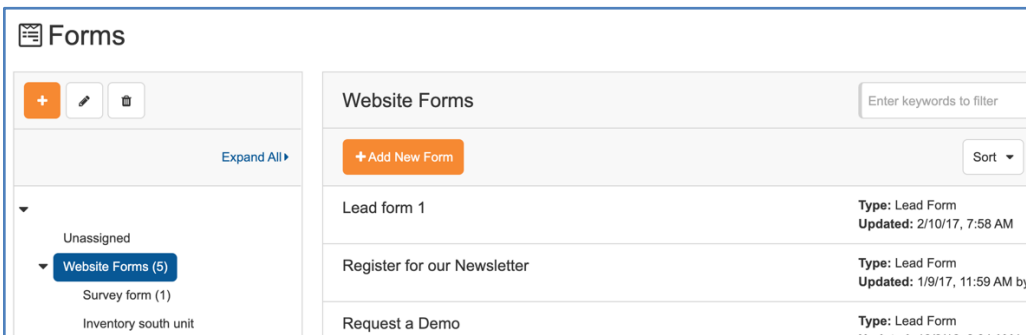
the Manage Email Campaigns page appears.



- When you click the arrow beside Forms, and then **Manage Forms**,



the Forms page appears.



- When you click the arrow beside Landing Pages, and then **Manage Landing Pages**,

16  
 Landing Pages

Manage Landing Pages

the Landing Pages page appears.

## Landing Pages

+ Add New Page

Status ▾
Sort ▾
Show ▾

<b>DEMO - Download Fact Sheet</b> <a href="#">landing-pages/demo-download-fact-sheet</a>	<b>Template:</b> Landing   <b>Status:</b> Published <b>Modified:</b> 10/10/18, 5:25 AM by Espinal, Christian
<b>DEMO GEO TARGETING - Conference</b> <a href="#">landing-pages/landing-industrial</a>	<b>Template:</b> Lead Form Landing Page   <b>Status:</b> Published <b>Modified:</b> 8/9/18, 8:26 AM by Espinal, Christian
<b>Big Sky - Winter 2017</b> <a href="#">landing-pages/big-sky-winter-2017</a>	<b>Template:</b> Lead Form Landing Page   <b>Status:</b> Draft <b>Modified:</b> 10/10/18, 5:25 AM by Espinal, Christian
<b>Contact Us</b> <a href="#">landing-pages/contact-us</a>	<b>Template:</b> Lead Form Landing Page   <b>Status:</b> Draft <b>Modified:</b> 8/9/18, 8:27 AM by Espinal, Christian

### Other dashboard features

- There are more quick-access sections on this first page. They include:
  - Recent Email Campaigns
  - Top Audience Lists
  - Activity Calendar
  - Activity Performance

The screenshot shows the Unbound Marketing dashboard with the following sections:

- Navigation:** Campaigns, Contacts, Assets, Administration, For Developers, FHealy@bridgeline.com, Site Editor
- Quick-Access Cards:** 28 Audience Lists, 37 Flows, 24 Campaigns, 35 Forms, 16 Landing Pages
- Recent Email Campaigns:** Includes a "Create New Email" button.
- Top Audience Lists:** Table with columns: Title, Contacts, Lead Score.
 

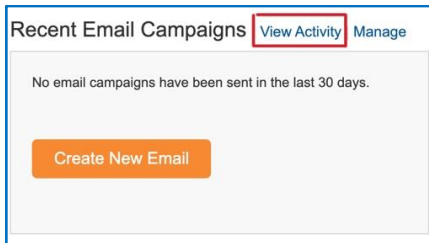
Title	Contacts	Lead Score
QATest0324		
QA Test Audience List 02.12.19		
QA AL-0611		
Percy/imported_0424		
Percy/imported0514		
- Activity Calendar:** View Details. Calendar for May 2020 showing dates and activity counts.
- Activity Performance:** Includes a "Year to Date" filter.

## Recent Email Campaigns

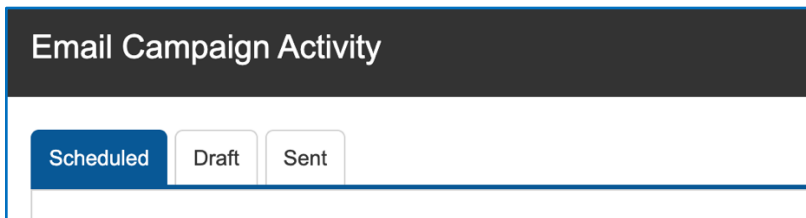
- For a quick look at email campaign activity, the box below Recent Email Campaigns allows you to see at a glance the email campaigns that have been sent in the last 30 days.



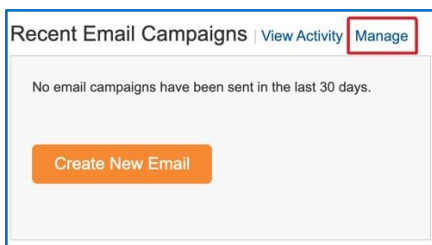
- Beside Recent Email Campaigns, click **View Activity**.



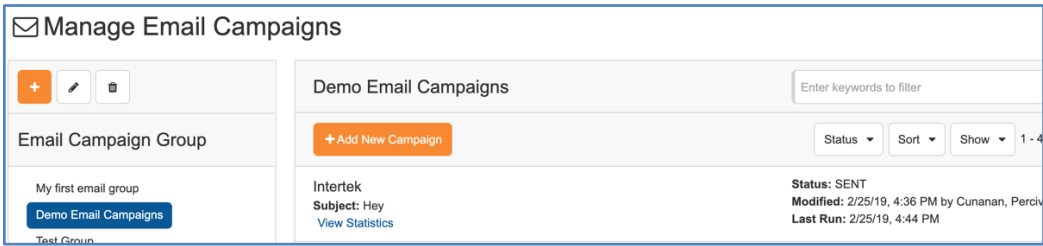
- This opens the Email Campaign Activity page.



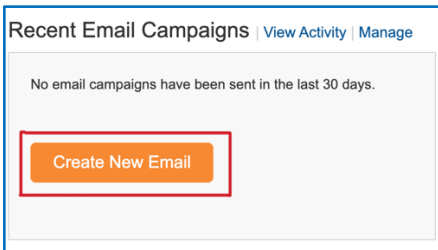
- On the Recent Email Campaign Activity page, use the Scheduled, Draft, and Sent tabs.
- To go straight to managing your campaigns, in the Recent Email Campaigns section, beside View Activity, click **Manage**.



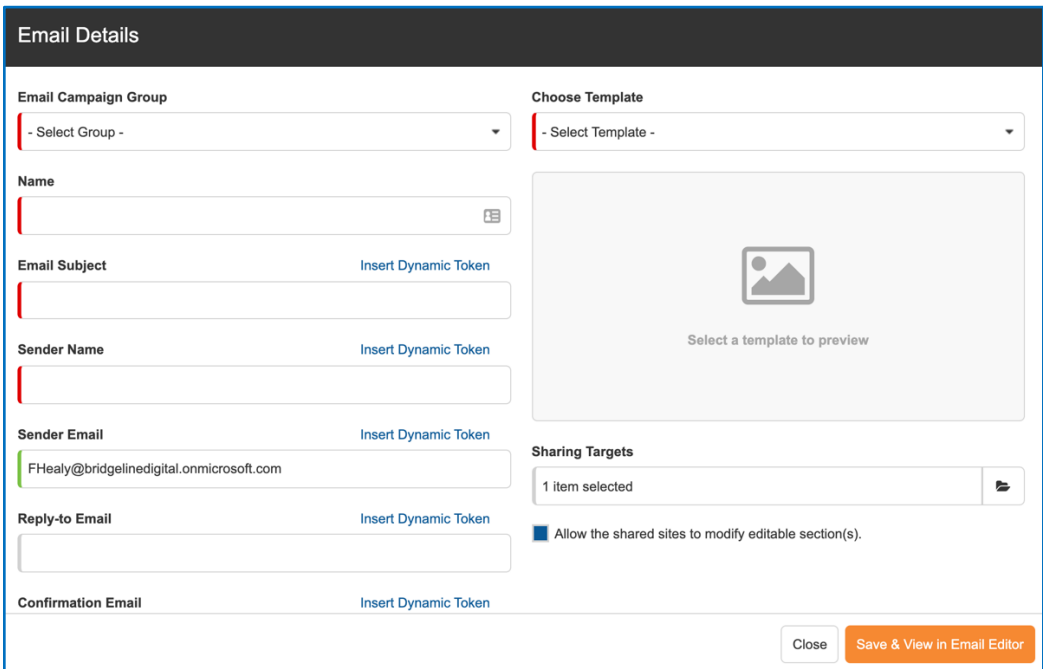
- This opens the Manage Email Campaigns page.



- To send an email using the Recent Email Campaigns section, click **Create New Email**.

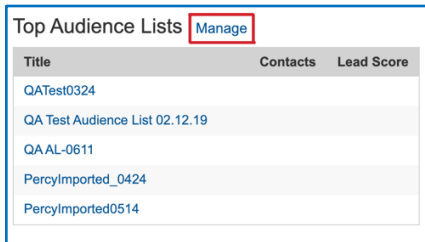


- This opens the [Email Details](#) page.



## Top Audience Lists

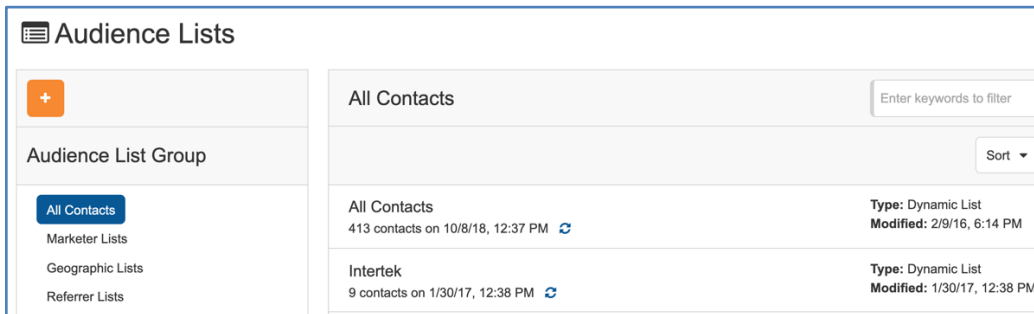
- For a quick look at your top audience lists, contacts, and Lead Score, see the Top Audience Lists section.
- Beside Top Audience Lists, click **Manage**.



The screenshot shows the 'Top Audience Lists' section. At the top right, there is a 'Manage' button highlighted with a red box. Below it is a table with three columns: 'Title', 'Contacts', and 'Lead Score'. The table contains five rows of audience list titles.

Title	Contacts	Lead Score
QATest0324		
QA Test Audience List 02.12.19		
QA AL-0611		
PercyImported_0424		
PercyImported0514		

- This opens the Audience Lists page.

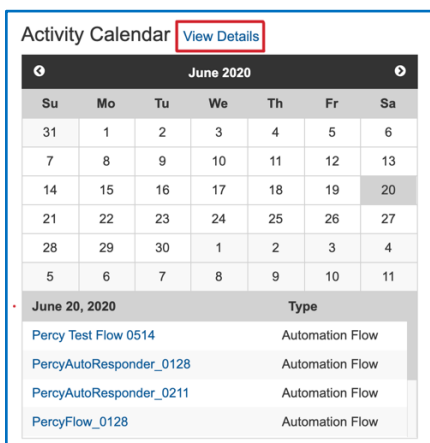


The screenshot shows the 'Audience Lists' page. On the left, there is a sidebar with 'Audience List Group' and buttons for 'All Contacts', 'Marketer Lists', 'Geographic Lists', and 'Referrer Lists'. The main area shows a list of audience groups with their contact counts and modification dates.

All Contacts		Enter keywords to filter
		Sort ▾
All Contacts	413 contacts on 10/8/18, 12:37 PM	Type: Dynamic List Modified: 2/9/16, 6:14 PM
Intertek	9 contacts on 1/30/17, 12:38 PM	Type: Dynamic List Modified: 1/30/17, 12:38 PM

## Activity Calendar

- For a quick look at your upcoming activities, select a date on the calendar for a list for the day.
- Beside Activity Calendar, click **View Details** to open the calendar.



The screenshot shows the 'Activity Calendar' for June 2020. A 'View Details' button is highlighted with a red box. Below the calendar, there is a table showing activities for June 20, 2020.

June 2020						
Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

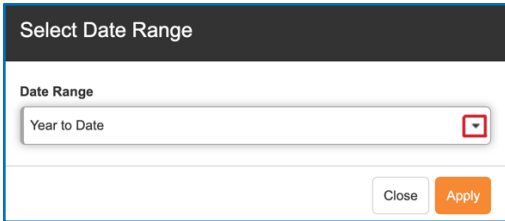
June 20, 2020	Type
Percy Test Flow 0514	Automation Flow
PercyAutoResponder_0128	Automation Flow
PercyAutoResponder_0211	Automation Flow
PercyFlow_0128	Automation Flow

## Activity Performance

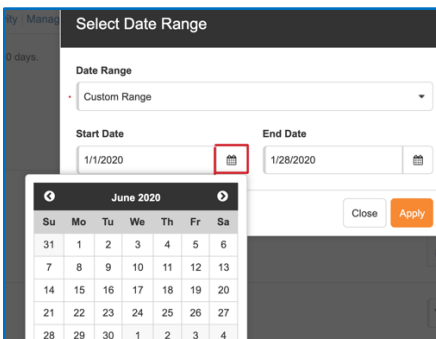
- For a quick look at your activity performance, see the list and graph in this section.
- In the Year to Date field, click the calendar icon.



- In the Select Date Range dialog, use the dropdown arrow to select a timeframe.



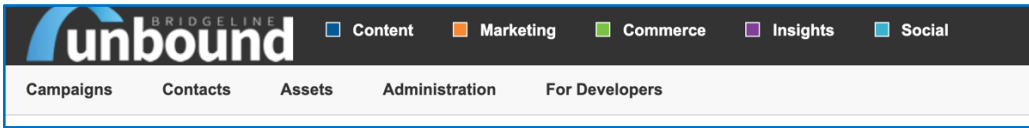
- If you choose **Custom Range** in the Select Date Range menu, in the dialog for this option, use the calendar icons for Start Date and End Date.



- Click **Apply**.

## Navigating Marketing

- In the Bridgeline Unbound products menu, select **Marketing**.



**Note:** Depending on your privileges, you might be able to view the pages but not edit them.

- In the sub-menu of sections below the Unbound products menu, select one of the following:
  - Campaigns
  - Contacts
  - Assets
  - Administration
  - For Developers



## Campaigns

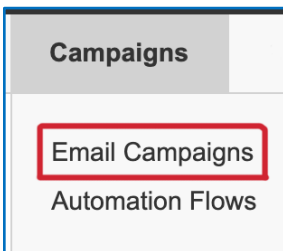
This is the place where you can create, organize, and manage email groups and campaigns; and also manage automation and autoresponder flows.

Under **Campaigns**, there are two sections: **Email Campaigns** and **Automation Flows**.

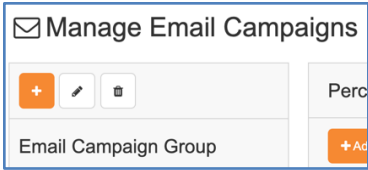
### Email Campaigns

Create your content and your look, or theme, and customize it to targeted groups.

- Under Campaigns, select **Email Campaigns**.

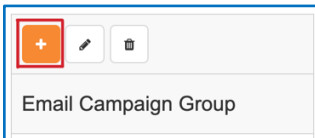


- On the Manage Email Campaigns page, use the icons at the top of the panel on the left to create and edit your Email Campaign Groups.

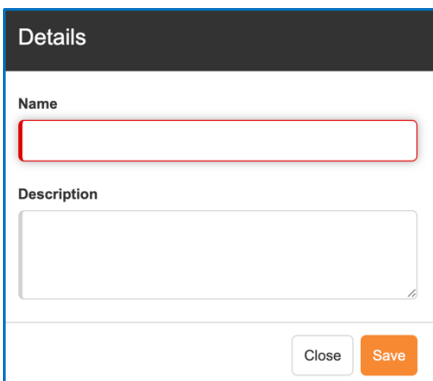


### Add an Email Campaign Group

- On the Manage Email Campaigns page, in the Email Campaign Group panel on the left, click the Add icon.



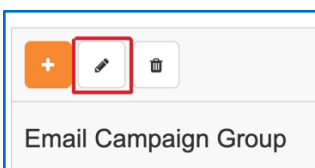
- In the Details dialog, in the Name field, enter a name.



- Optionally, in the Description field, enter a description.
- Click **Save**, or **Close** to return to the Manage Email Campaigns page.

### Edit an Email Campaign Group

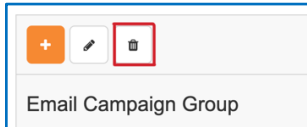
- On the Manage Email Campaigns page, in the Email Campaign Group panel on the left, click the Edit icon.



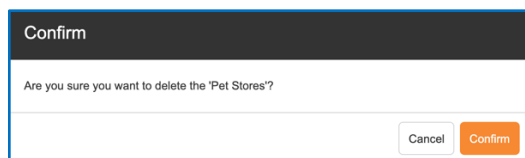
- In the Details dialog, make any revision.

## Delete an Email Campaign Group

- On the Manage Email Campaigns page, in the Email Campaign Group panel on the left, click the Delete icon.

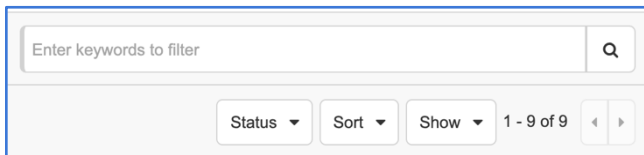


- In the Confirm dialog, click **Confirm**, or **Cancel** to return to the Manage Email Campaigns page.

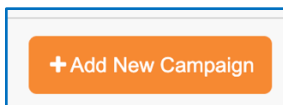


## Add a new email campaign

On the Manage Email Campaigns page, in the section on the right for campaigns, a search panel helps you to find your campaigns by Keyword or by using the Status, Sort and Show menus.



- In the Email Campaign Group panel, select a group.
- In the panel on the right, click **Add New Campaign**.



**Note:** Email Campaigns use a variety of email **templates**. The templates determine which **content type** you can use, and therefore how an email will be displayed to your readers.

## Email Details page

[Related: [Edit in Email Editor](#)]

- In the Email Details page, in the Name field, enter a campaign name.

- In the Email Subject field, enter a campaign subject.

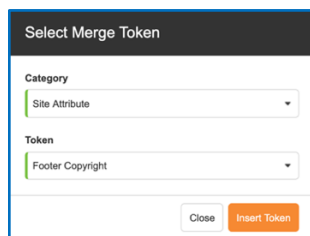
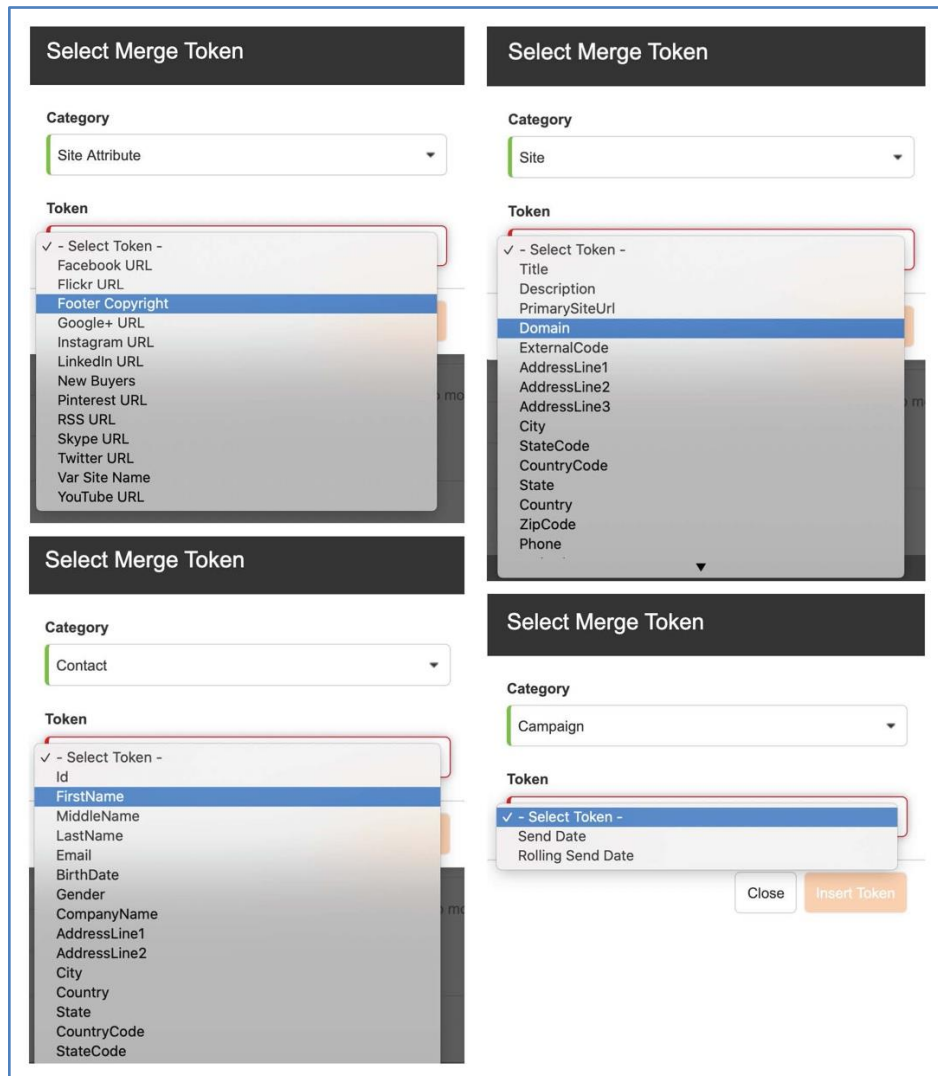
The screenshot shows the 'Email Details' form with the following elements:

- Name:** An empty text input field.
- Choose Template:** A dropdown menu showing '- Select Template -'.
- Email Subject:** An empty text input field with an 'Insert Dynamic Token' link.
- Sender Name:** An empty text input field with an 'Insert Dynamic Token' link.
- Sender Email:** A text input field containing 'FHealy@bridgeline.digital.onmicrosoft.com' with an 'Insert Dynamic Token' link.
- Reply-to Email:** An empty text input field with an 'Insert Dynamic Token' link.
- Confirmation Email:** A text input field containing 'FHealy@bridgeline.digital.onmicrosoft.com' with an 'Insert Dynamic Token' link.
- Sharing Targets:** A dropdown menu showing '1 item selected'.
- Allow the shared sites to modify editable section(s):** A checked checkbox.
- Buttons:** 'Close' and 'Save & View in Email Editor' (highlighted with a red box).

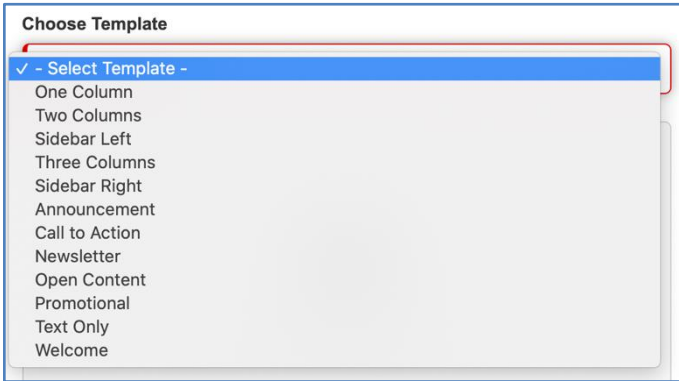
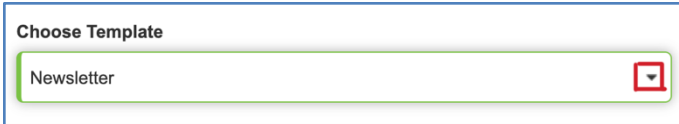
- In the Sender Name field, enter the sender's name.
- Optionally, in the Reply-to Email field, enter a reply email address.
- Optionally, in the Confirmation Email field, enter a confirmation email address.
- Optionally, above the Email Subject, Sender Name, Sender Email, Reply-to Email and Confirmation Email fields, click **Insert Dynamic Token**.
  - In the Select Merge Token dialog, use the dropdown arrow to Select Category and Select Token.

The 'Select Merge Token' dialog has the following structure:

- Category:** A dropdown menu with '- Select Category -'.
- Token:** A dropdown menu with '- Select Token -'.
- Buttons:** 'Close' and 'Insert Token'.



- Click **Insert Token**.
- In the Choose Template field, use the dropdown arrow to select a Template. (To understand why this is important, please see [Edit in Email Editor](#).)



- Optionally, in the Sharing Targets field, click the folder icon to make your selection.
- Optionally, select the check box beside Allow the shared sites to modify editable section(s).
- When you have entered all your information, click **Save & View in Email Editor**.

### Edit in Email Editor

There are many options for editing your email campaign in the **Email Editor**. The options depend on the template you first choose on the [Email Details](#) page.

*[Related: [Add an Autoresponder](#)]*

### Options for creating and editing in Email Editor

*[Related: [Assets-Automation Flow Emails-Add new Email](#)]*

When you add a new email campaign, depending on the standard template you choose on the Email Details page, this is what you can do in the Email Editor.

If you choose...	...you can
One Column	<ul style="list-style-type: none"> <li>• Insert Image from Library</li> <li>• Edit Image</li> <li>• Remove Image</li> <li>• Assign Tags</li> <li>• Hide</li> <li>• [View] About Image</li> <li>• Create New Text</li> <li>• Insert Text from Library</li> <li>• Edit Text</li> </ul>

Two Columns

- Remove Text
- [View] About Content
- Insert Image from Library
- Edit Image
- Remove Image
- Assign Tags
- Hide
- [View] About Image
- Create New Text
- Insert Text from Library
- Edit Text
- Remove Text
- [View] About Content

Sidebar Left

- Insert Image from Library
- Edit Image
- Remove Image
- Assign Tags
- Hide
- [View] About Image
- Create New Text
- Insert Text from Library
- Edit Text
- Remove Text
- [View] About Content

Three Columns

- Insert Image from Library
- Edit Image
- Remove Image
- Assign Tags
- Hide
- [View] About Image
- Create New Text
- Insert Text from Library
- Edit Text
- Remove Text
- [View] About Content

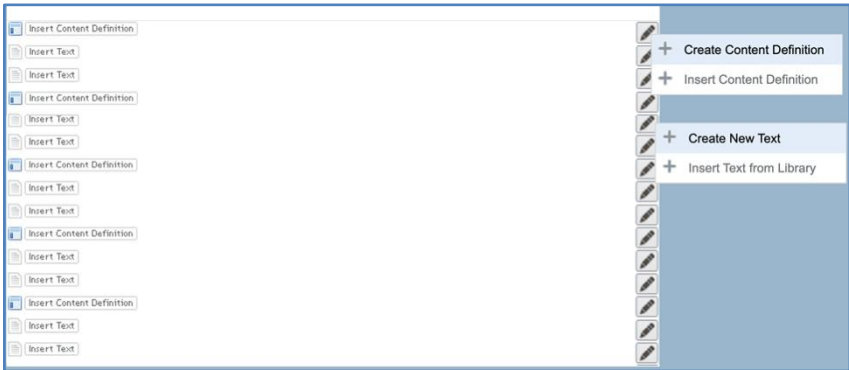
Sidebar Right

- Insert Image from Library
- Edit Image
- Remove Image
- Assign Tags
- Hide
- [View] About Image
- Create New Text

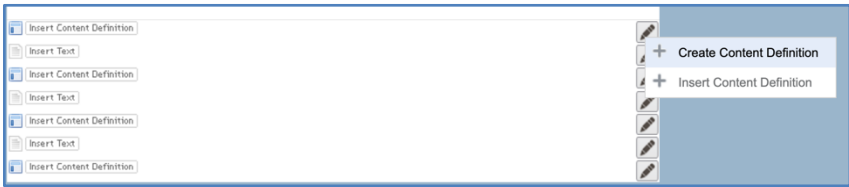
Announcement	<ul style="list-style-type: none"> <li>• Insert Text from Library</li> <li>• Edit Text</li> <li>• Remove Text</li> <li>• [View] About Content</li> <li>• Create Content Definition</li> <li>• Insert Content Definition</li> <li>• Edit Content Definition</li> <li>• Remove Content Definition</li> <li>• Create New Text</li> <li>• Insert Text from Library</li> <li>• Edit Text</li> <li>• Remove Text</li> <li>• Assign Tags</li> <li>• Hide</li> <li>• [View ]About Content</li> </ul>
Call to Action	<ul style="list-style-type: none"> <li>• Create Content Definition</li> <li>• Insert Content Definition</li> <li>• Create New Text</li> <li>• Insert Text from Library</li> <li>• Edit Text</li> <li>• Remove Text</li> <li>• Assign Tags</li> <li>• Hide</li> <li>• [View] About Content</li> </ul>
Newsletter	<ul style="list-style-type: none"> <li>• Create Content Definition</li> <li>• Insert Content Definition</li> <li>• Edit Content Definition</li> <li>• Remove Content Definition</li> <li>• Create New Text</li> <li>• Insert Text from Library</li> <li>• Edit Text</li> <li>• Remove Text</li> <li>• Assign Tags</li> <li>• Hide</li> <li>• [View] About Content</li> </ul>
Open Content	<ul style="list-style-type: none"> <li>• Create Content Definition</li> <li>• Insert Text</li> <li>• Insert Content Definition</li> <li>• Edit Content Definition</li> <li>• Remove Content Definition</li> <li>• Create New Text</li> <li>• Insert Text from Library</li> </ul>

Promotional	<ul style="list-style-type: none"> <li>• Edit Text</li> <li>• Remove Text</li> <li>• Assign Tags</li> <li>• Hide</li> <li>• [View] About Content</li> </ul>
Text Only	<ul style="list-style-type: none"> <li>• Create Content Definition</li> <li>• Insert Content Definition</li> <li>• Create New Text</li> <li>• Insert Text from Library</li> </ul>
Welcome	<ul style="list-style-type: none"> <li>• Create New Text</li> <li>• Insert Text from Library</li> </ul>
	<ul style="list-style-type: none"> <li>• Create Content Definition</li> <li>• Insert Content Definition</li> <li>• Create New Text</li> <li>• Insert Text from Library</li> </ul>

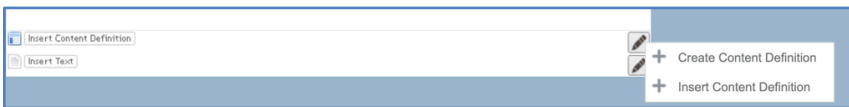
### Sample templates in Email Editor



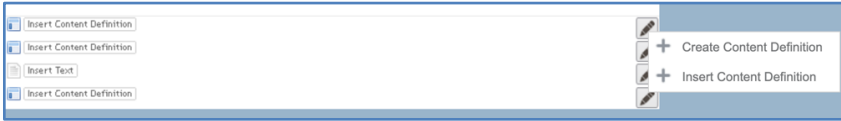
*Email Editor showing sample Open Content template*



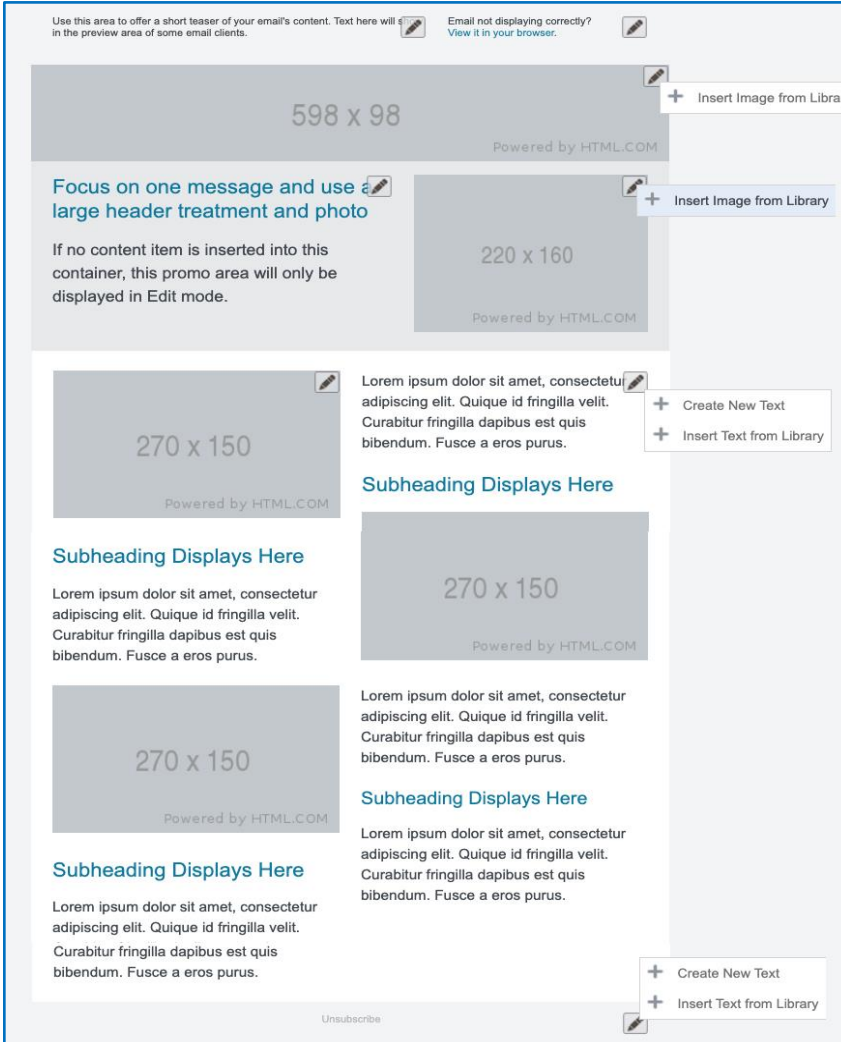
*Email Editor showing sample Newsletter template*



Email Editor showing sample Announcement and Call to Action templates



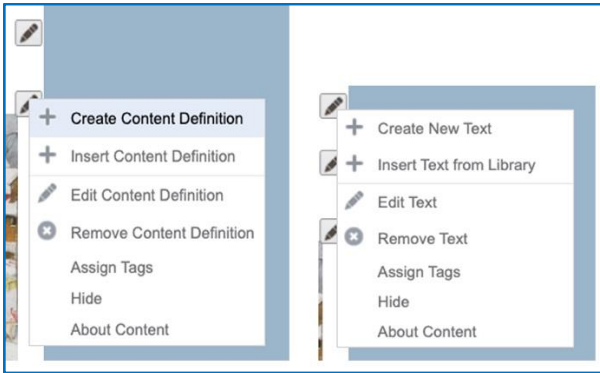
Email Editor showing sample Promotional and Welcome templates



Email Editor showing a sample One Column, Two column, Sidebar Left, Three Columns, and Sidebar Right templates

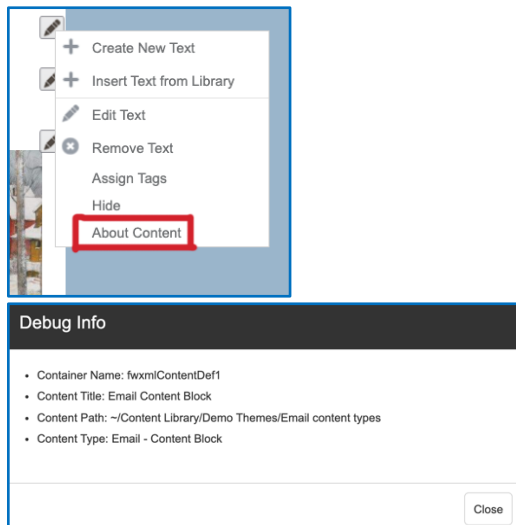


*Email Editor showing sample Text-Only template*



*Email Editor showing options for the sample templates: Announcement, Newsletter, and Open Content*

- If you click **About Content** in certain templates (for example, the Announcement, Newsletter and Open Content sample templates), you will see the relevant information displayed in the Debug Info dialog.



## Create content and insert text in Email Editor

*[Related: [Assets-Automation Flow Emails-Add new Email](#)]*

The following email templates (created when you add a new campaign) allow you to create or insert content (Insert Content Definition) in the Email Editor:

- Announcement
- Call to Action
- Newsletter
- Open Content
- Promotional
- Welcome

The following email templates (created when you add a new campaign) allow you to Insert Text in the Email Editor:

- One Column
- Two Columns
- Sidebar Left
- Three Columns
- Sidebar Right
- Announcement
- Newsletter
- Open Content
- Promotional
- Text Only
- Welcome

### Content

To create or insert content in the Email Editor, click the edit icon corresponding with **Insert Content Definition**.



- In the pop-out menu, select Create Content Definition or Insert Content Definition.



- If you select **Create Content Definition**, on the Content Details page, in the Title field, enter a title. (Please see [Content Type](#).)
- Optionally, in the Description field, enter a description.

### Content Details

**Title**

**Description**

**Content type**

Blog Post ▼

### Content Type

- In the Content type field, use the dropdown arrow to select a template.

**Note:** The way your content is displayed in the Email Editor will differ depending on the **Content type** you choose.

**Content type**

**Content type**

- ✓ 2 Col Features
- 4 Col Promos
- Accordion Item
- Banner
- Blog Post
- Content Slider Panel
- Email - Content Block
- Email - Content Block 1x2
- Email - Content Block 1x3
- Email - Hero Image
- Email - Image Aligned Content
- Feature Block
- Feature Block 1x2
- Feature Block 1x3
- Feature Block 1x4
- Feature Block 5
- Feature Slide
- Gallery Image
- Location

For more information on creating content depending on Content type, please see [Content Type Options](#)

- When you have entered your information on the Content Details page, click **Save**.
- In order to save your content in your Unbound content library, on the **Create Content: Select Target** page, enter a title.
- In the directory, select from the menu.
- Click **Select Directory**.

The screenshot shows a web interface titled "Create Content: Select Target". At the top, there is a text input field labeled "Enter a Title" containing the text "Travel in comfort". Below the input field are three icons: a plus sign, a pencil, and a trash can. A dropdown menu is open, displaying a hierarchical list of content categories. The categories include "Unassigned (83)", "Emails - Landing Pages (3)", "Common (4)", "Solutions (13)", "Customer Success (9)", "Our Company (13)", "Resource Center", and "Demo Themes (4)". The "Blogs (3)" category is highlighted with a blue button. At the bottom of the interface, there are two buttons: "Close" and "Select Directory".

### Sample combinations of templates and content types

The following are samples of the way content can be displayed using various combinations of email templates and content types.

- The **templates** are created when you add a new campaign.
- The **content types** are determined when you create the content.



*Below: Sample content created using an Open Content email template with the Hero Image Content Type (top); also, new text using the rich text editor and image (bottom).*



Autumn in Australia -- without the heat of summer or the coolness of winter. Autumn is just right, with constant moderate temperatures and plenty of sunshine.



Insert Text  
Insert Content Definition  
Insert Text  
Insert Text



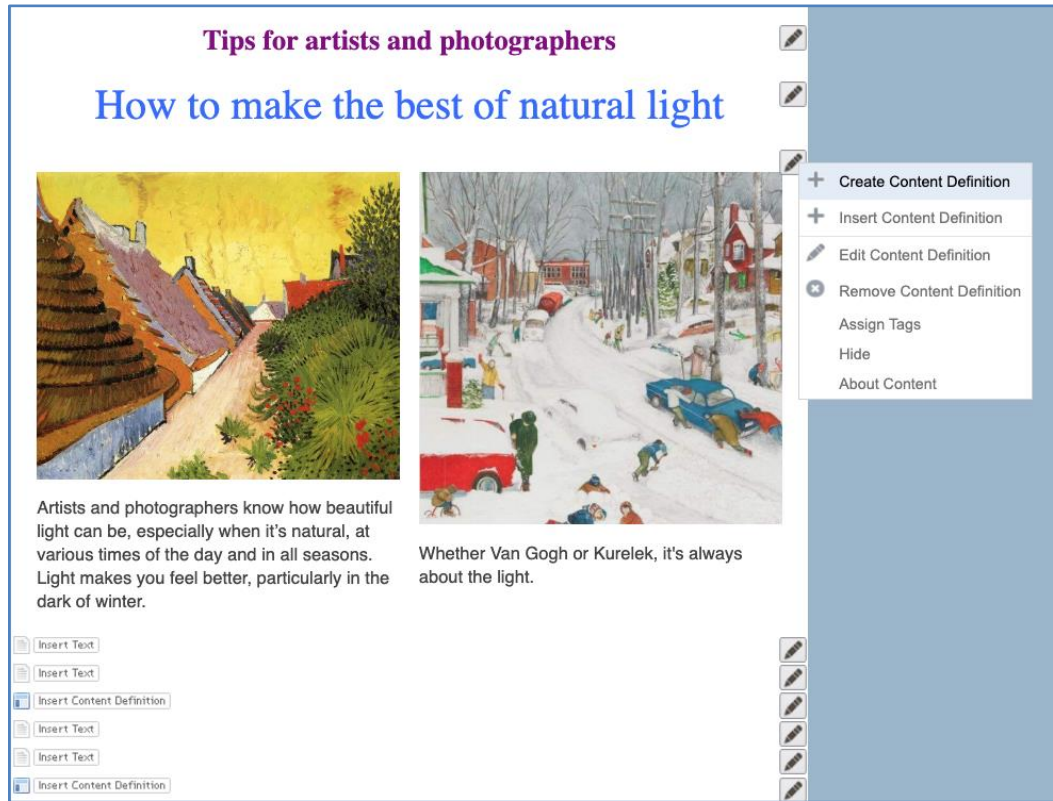


Below: Sample content created using the Promotional email template with three different Content Types: Email-Content Block 1x3 (top); Email- Hero Image (middle); and Email-Image Aligned Content (bottom)

The screenshot displays an email editor interface with three content blocks and their associated context menus:

- Block 1 (Top):** A 1x3 grid of three images: daisies, orange flowers, and purple flowers. Below the images is the text: "Daisies are one of the cheeriest of flowers." To the right of the orange flowers is the text: "Give your garden a certain 'pop' with bright orange." To the right of the purple flowers is the text: "Purple is another show-stopping colour in the garden." A context menu is open to the right of this block, listing options: Create Content Definition, Insert Content Definition, Edit Content Definition, Remove Content Definition (checked), Assign Tags, Hide, and About Content.
- Block 2 (Middle):** A hero image showing four colorful buckets (pink, green, pink, pink) on a sandy beach. A context menu is open to the right, listing options: Create Content Definition, Insert Content Definition, Edit Content Definition, Remove Content Definition (checked), Assign Tags, Hide, and About Content.
- Block 3 (Bottom):** A content block with the heading "Looking for the sun" and the text "When you think about vacation, what's the first thing that comes to mind?". It features a small image of waves on the left and a blue square placeholder on the right. A context menu is open to the right, listing options: Create New Text, Insert Text from Library, Create Content Definition, Insert Content Definition, Edit Content Definition, Remove Content Definition (checked), Assign Tags, Hide, and About Content.

- Below: Sample content using the Open Content email template with Email-Content Block 1x2 Content Type. Also: new text (for the headers) using Create New Text with the Rich Text Editor.

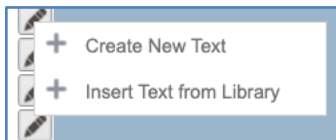


### Text only

- If the template allows you to create or insert text, click the edit icon corresponding with **Insert Text**.

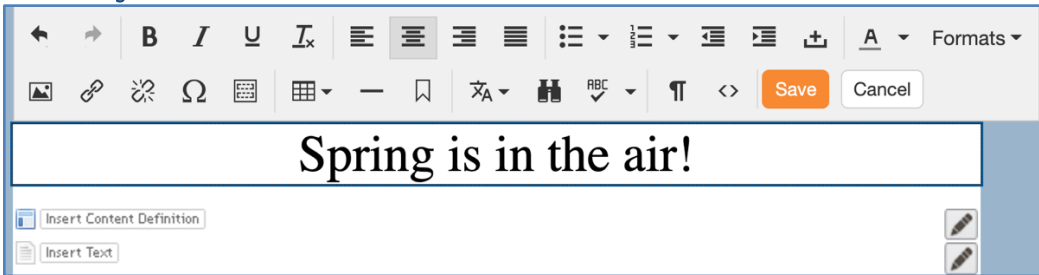


- In the pop-out menu, select **Create New Text** or **Insert Text from Library**.



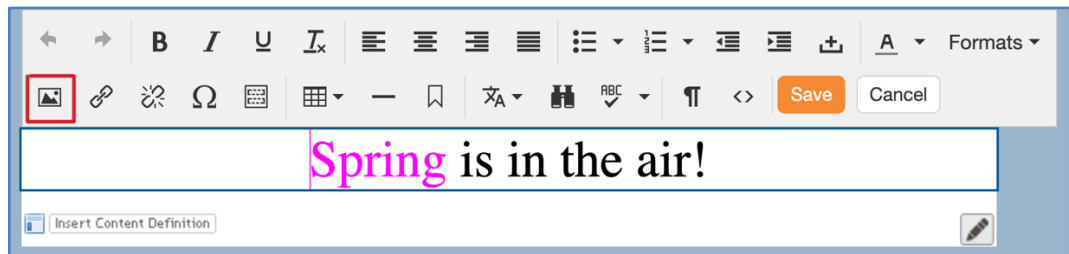
- If you choose **Create New Text**, use the rich text editor to create your text. (Please see **Using the Rich Text Editor**.)

Below: Using the Rich Text Editor

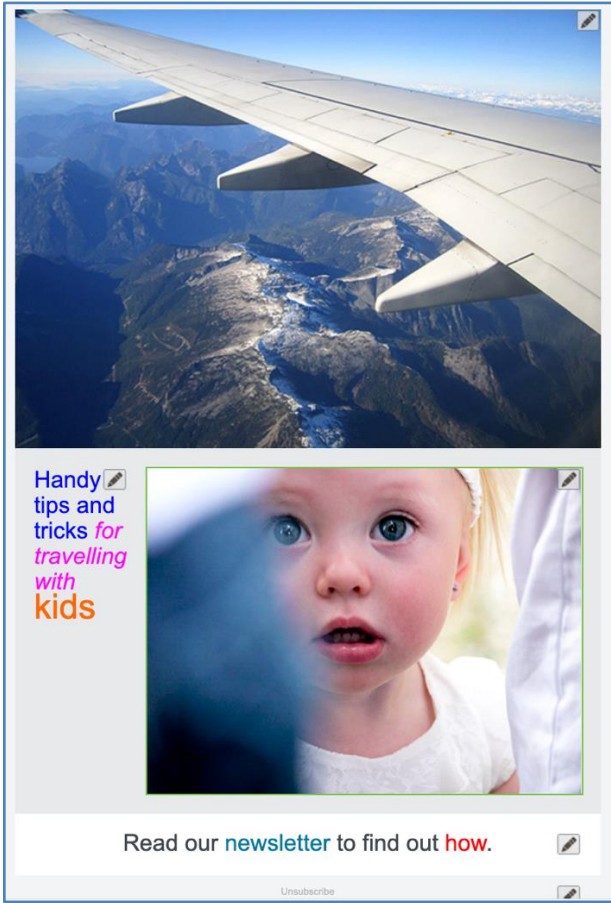


- Click **Save**.
- On the **Create Content: Select Target** page, enter a title.
- In the directory, select from the menu.
- Click **Select Directory**. (This saves your text in your Unbound content library.)
  - Optionally, in the Email Editor, click the edit icon again to create, edit or remove text, to assign tags, to hide/show the text or to see the content path. (You can also Insert an image using the [Rich Text](#) Editor.)

Below: Sample Promotional email template using Insert Text and an image inserted from the Rich Text Editor.

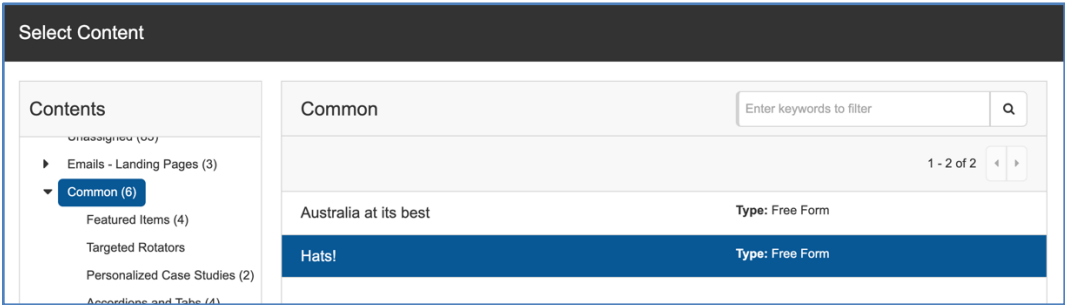


Below: Sample One Column email template using Create New Text and Insert Image from Library.



If you choose **Insert Text from Library**, on the Select Content page, in the Contents panel on the left, choose an item from the menu.

- In the panel on the right, choose the content that contains your text.




- Click **Select**.


- Optionally, in the Email Editor, click the edit icon again to create, edit or remove text, to assign tags, or to hide/show the text.

*Below: Sidebar Left email template using Insert Image from Library, Create New Text, and Rich Text Editor with the insert image option.*


Need **chairs**? We have them all! [Chairs-are-us.com](#)



**From the ELEGANT...**  
 Our new selection of leather-rich and comfortable desk chairs are made for efficiency and long wear.  
 See our latest catalog!  
[New chairs for 2020](#)



**To the SIMPLE.**  
 If you need to stack them, wash them, take them outside, arrange them in rows, and most of all, have them stand up to years of endurance, you'll like our Simplicity Chairs, in six different colors.



[Unsubscribe](#)

## Content Type options

Related: [Assets-Automation Flow Emails-Add new Email](#)

When you create your content, the Content Type you choose impacts your next steps. Each piece of content needs to belong to a content type. These content types determine how you can use your content in a variety of email templates.

Related: [Content Type](#).

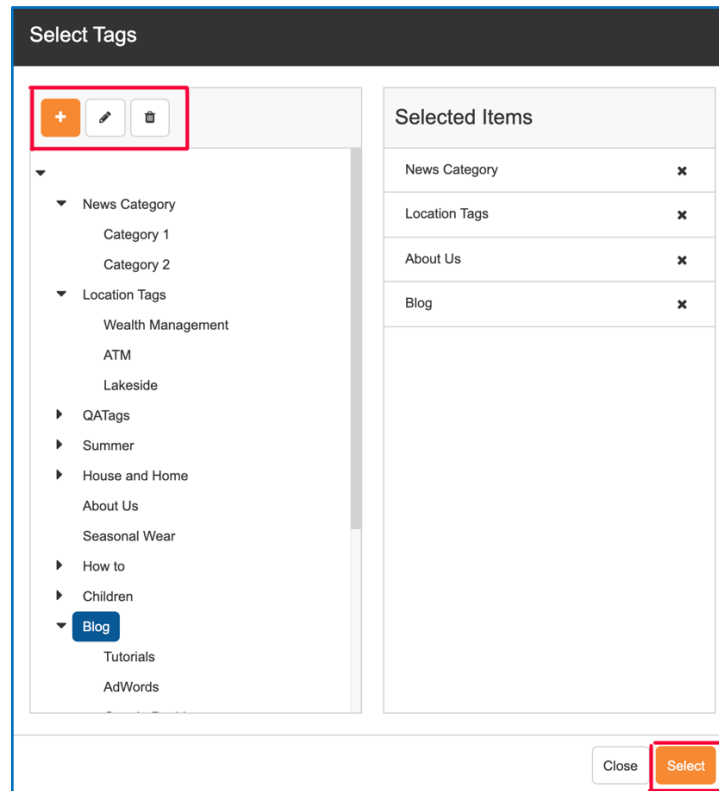
### Freeform Content Type

Freeform is the default content type. When you choose this type, you have few limitations and can easily use the Rich Text Editor; at this point you can't select the page where it will reside.

- On the Content Details page, enter a Title.

- Optionally, in the left panel, enter a Description.
- The Content Type default is Freeform.
- Optionally, in the Tags field, click the folder icon.

- On the Select Tags page, select a category.
- Optionally, use the icons to Add, Edit or Delete a Tag.



- In the Selected Items panel, click **Select**.
- Under Details (on the Content Details page), enter your content using the Rich Text Editor. (See [Using the Rich Text Editor](#).)
- Click **Save**.

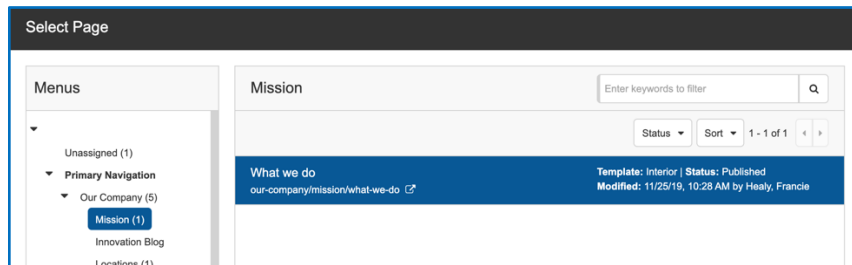
## 2 Col Features Content type

On the Content Details page, if you select **2 Col Features** in the **Content Type** menu, the following shows you what to expect with this content type and how to enable it.

You will see several fields that require your input.

- In the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **2 Col Features**.

- Optionally, in the Tags field, click the folder icon.
- On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Under Title 1, enter a Title.
- Under Description 1, enter your text.
- In the Image 1 field, click the folder icon.
  - On the Select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- Once you have chosen your image, click **Select**.
- In the Page URL 1 field, click the folder icon.
- On Select Page, choose the category where your intended page resides.
- In the panel on the right, select the page.



- Under Title 2, enter a Title.
- Under Description 2, enter your text.
- In the Image 2 field, click the folder icon.
  - On the select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- Once you have chosen your image, click **Select**.
- In the Page URL2 field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- On the Content Details page, click **Save**.

Below: Sample 2 Col Features Content Type



**It never rains but it pours**

That's a good thing when you want a fresh start.[more](#)



**And early rain brings spring flowers**

It's exactly the kind of bright new response you want.[more](#)

Insert Text

## 4 Col Promos Content type

On the Content Details page, if you select **4 Col Promos** in the **Content Type** menu, the following shows you what to expect with this content type and how to enable it.

You will see many fields that require your input.

- In the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **4 Col Promos**.

The screenshot shows the 'Content Details' form for the '4 Col Promos' content type. The form is organized into two main columns. The left column contains the following fields:

- Title:** A text input field with the value 'Winter sale'.
- Description:** A large text area.
- Content type:** A dropdown menu with '4 Col Promos' selected. This field is highlighted with a red rectangular box.
- Tags:** A field showing '5 items selected' with a folder icon to its right, which is also highlighted with a red box.

The right column contains a repeating list of fields for each of the four promotional items:

- Title 1:** 'Keep warm this winter'
- Image 1:** 'https://master.stage.demo.iapps.com/Image Library/Unassigned/many-hats.png' with a folder icon and a red box around it.
- Link Text 1:** 'We have hats! Many hats, warm hats...and they're on sale!'
- Page URL 1:** 'https://master.stage.demo.iapps.com/products/on-sale/on-sale' with a folder icon and a red box around it.
- Title 2:** 'A warm head is a happy head'
- Image 2:** 'https://master.stage.demo.iapps.com/Image Library/Unassigned/Yellow-baby-hat.jpg' with a folder icon and a red box around it.
- Link Text 2:** 'Keep baby's head covered in warmth and style.'
- Page URL 2:** 'https://master.stage.demo.iapps.com/products/on-sale/on-sale' with a folder icon and a red box around it.
- Title 3:** 'Mom needs to be warm, too.'
- Image 3:** 'https://master.stage.demo.iapps.com/Image Library/Unassigned/Grey-hat.jpg' with a folder icon and a red box around it.
- Link Text 3:** 'Simple, elegant, stylish hat with a hidden agenda -- your warm head.'
- Page URL 3:** 'https://master.stage.demo.iapps.com/products/on-sale/on-sale' with a folder icon and a red box around it.
- Title 4:** 'Staying warm is not only sensible, it's fun!'
- Image 4:** 'https://master.stage.demo.iapps.com/Image Library/Unassigned/multi-coloured-child-s-hat.jpg' with a folder icon and a red box around it.
- Link Text 4:** 'Add color and pizzazz to your child's winter'
- Page URL 4:** 'https://master.stage.demo.iapps.com/products/on-sale/on-sale' with a folder icon and a red box around it.

At the bottom right of the form, there are two buttons: 'Close' and 'Save'.

- Optionally, in the Tags field, click the folder icon.

- On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Under Title 1, enter a title.
- In the Image 1 field, click the folder icon.
  - On the Select Image page, choose an image category.
  - In the image list on the right, select an image or click **Add New Image**. (Please see [Select and Insert an image in the Email Editor](#)).
- Once you have chosen your image, click **Select**.
- In the Link Text 1 field, enter your text.
- In the Page URL 1 field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- In the Title 2 field, enter a Title.
- In the Image 2 field, click the folder icon.
  - On the Select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- In the Link Text 2 field, enter your text.
- In the Page URL 2 field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- In the Title 3 field, enter a Title.
- In the Image 3 field, click the folder icon.
  - On the Select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- In the Link Text 3 field, enter your text.
- In the Page URL 3 field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- In the Title 4 field, enter a Title.
- In the Image 4 field, click the folder icon.
  - On the Select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- In the Link Text 4 field, enter your text.
- In the Page URL 4 field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.

- On the Content Details page, click **Save**.

*Below: Sample 4-col Promos Content Type*

**Live a dog's life!**  
But first... you need the right dog

**Take care of your head**  
But first... you need the perfect hat

**Work in comfort**  
But first... you need the right chair

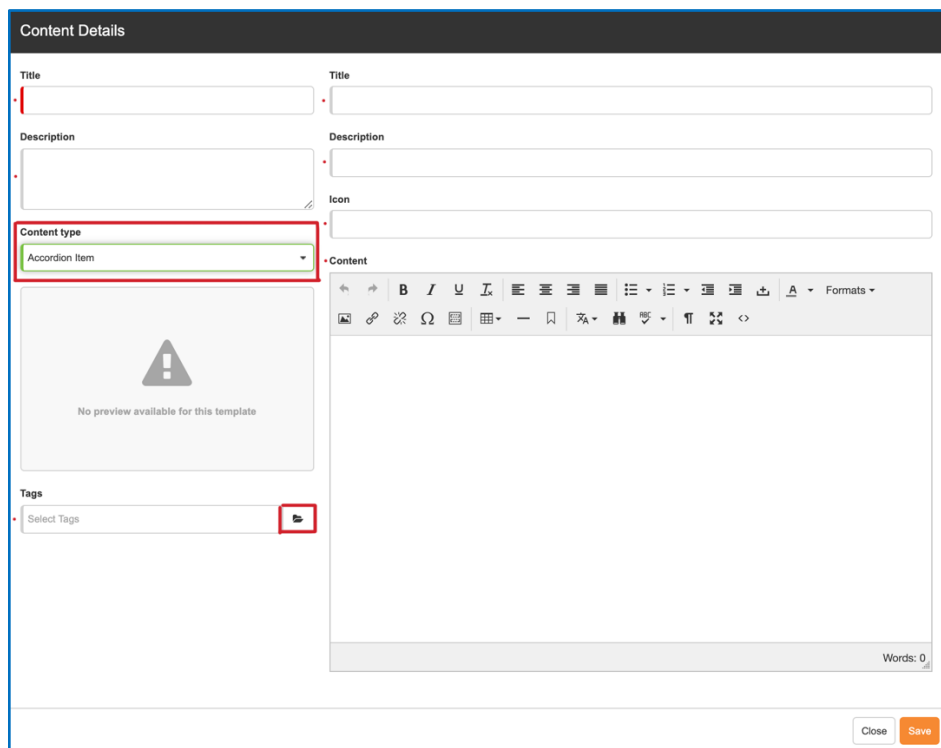
**Travel the world**  
But first... you need a travel plan

## Accordion Item Content Type

You can use this Content Type to list and format content in an accordion style listing that expands and contracts inline.

On the Content Details page, if you select **Accordion Item** in the **Content Type** menu, the following shows you what to expect with this content type and how to enable it.

- On the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Accordion Item**.






The screenshot shows the 'Content Details' form for an 'Accordion Item'. The form is divided into several sections:

- Title:** Two text input fields for entering the title.
- Description:** Two text input fields for entering a description.
- Content type:** A dropdown menu with 'Accordion Item' selected and highlighted by a red box.
- Icon:** A text input field for entering an icon.
- Content:** A rich text editor with a toolbar and a large text area. A red box highlights a folder icon in the toolbar.
- Tags:** A 'Select Tags' input field with a folder icon button highlighted by a red box.
- Preview:** A placeholder area with a warning icon and the text 'No preview available for this template'.
- Footer:** 'Close' and 'Save' buttons.

- Optionally, in the Tags field, click the folder icon.
- On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Under Details, enter your content using the Rich Text Editor. (Please see [Select and Insert an image in the Email Editor](#)).

Below: sample of Accordion Item Content Type in Open Content email template

- **How to Grow Daisies**  
Regularly cutting and dead heading is what keeps them blooming.  
  
[Lots more about Daisies](#)
- **Spring flowers!**  
There's nothing quite like the sight of first Spring flowers.  
  
[See the best of the best for Spring](#)
- **Orange is the new red**  
Orange flowers are a stunning pop of colour in your garden.  
  
[See the many varieties of orange flowers.](#)

## Banner Content Type

Use this Content Type to feature a banner and headline for interior content pages with options for left, right and center alignment as well dark and light copy.

On the Content Details page, if you select **Banner** in the **Content Type** menu, the following shows you what to expect with this content type and how to enable it.

- In the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, use the dropdown arrow to select **Banner** from the menu.

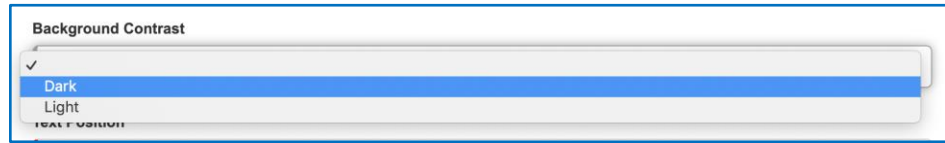
The screenshot shows the 'Content Details' form for the 'Banner' content type. The form is divided into several sections:

- Title:** Two text input fields.
- Description:** Two text input fields.
- Content type:** A dropdown menu with 'Banner' selected, highlighted by a red box.
- Subtitle:** A text input field.
- Background Contrast:** A dropdown menu with a red box around the arrow.
- Text Position:** A dropdown menu with a red box around the arrow.
- Text Theme:** A dropdown menu with a red box around the arrow.
- Background Image:** A 'Select Image' button with a folder icon and a red box around it, and a 'Fixed Background' checkbox with a red box around it.
- Callout Button Text:** A text input field.
- Callout CSS Class:** A text input field.
- Target Page:** A 'Select Page' button with a folder icon and a red box around it.
- Target File:** A 'Select File' button with a folder icon and a red box around it.
- Target External Uri:** A text input field.

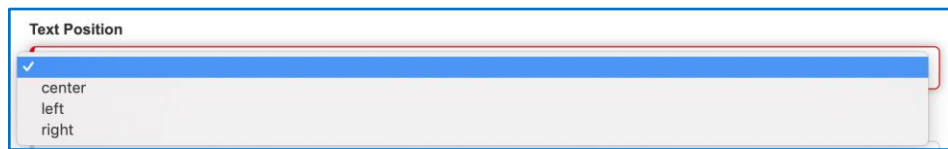
A preview area shows a warning icon and the message 'No preview available for this template'. The 'Tags' field has a folder icon highlighted with a red box. The 'Close' and 'Save' buttons are at the bottom right.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.

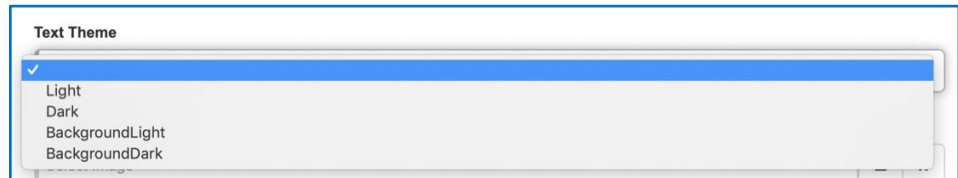
- Optionally, in the panel on the right, enter a Title.
- Optionally, enter a Description.
- Optionally, enter a Subtitle.
- Optionally, in the Background Contrast field, use the dropdown arrow to select Dark or Light.



- In the Text Position field, use the dropdown arrow to select center, left, or right.



- Optionally, in the Text Theme field, use the dropdown arrow to select Light, Dark, BackgroundLight, or BackgroundDark.



- Optionally, in the Background Image field, click the folder icon.
  - On the Select Image page choose an Image category.
- In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- Optionally, select the check box beside Fixed Background.
- Optionally, in the Callout Button Text field, enter your text.
- Optionally, in the Callout CSS Class, enter the information.
- Optionally, in the Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- Optionally, in the Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
  - When you have chosen your targeted file, click **Select**.

- Optionally, in the Target External URL field, enter the targeted URL.
- Click **Save**.

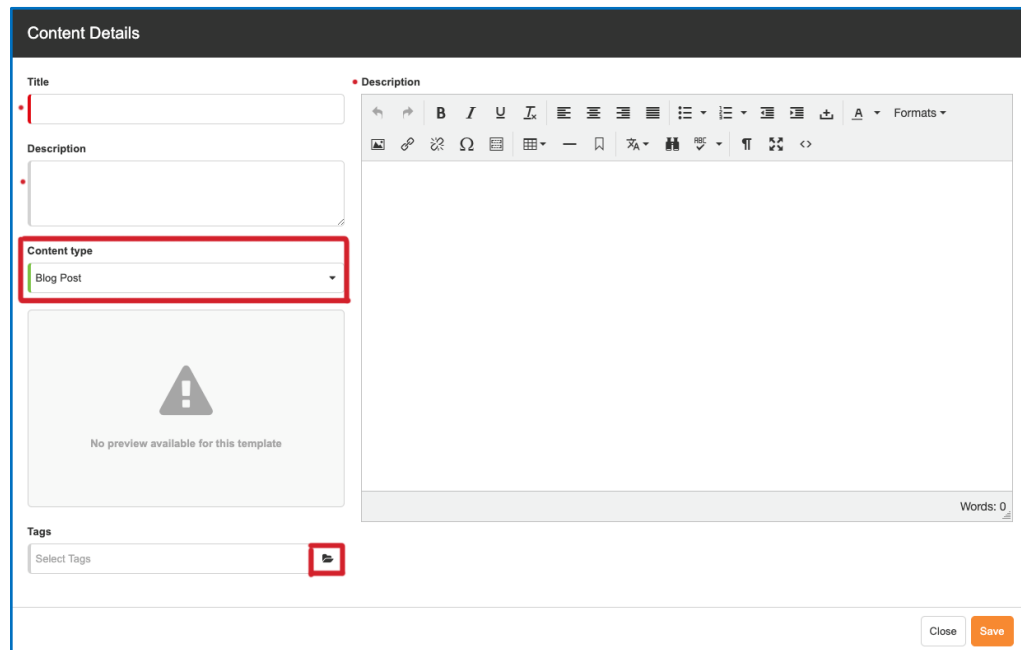
Below: sample Banner Content Type



Blog Post Content Type

On the Content Details page, if you select **Blog Post** in the **Content Type** menu, the following shows you what to expect with this content type and how to enable it.

- It will be similar to the Freeform Content Type.
- On the Content Details page, enter a Title.
- Optionally, in the Description field, add a description.



- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.

- In the Description section on the right, enter your text and/or images using the Rich Text Editor (Please see [Select and Insert an image in the Email Editor](#)).
- Click **Save**.

*Below: sample Blog Post Content Type*

**Here comes the sugar cane train**



*Where the true meaning of sweetness begins*

Australia is the world's third largest exporter of raw sugar, with approximately 80 percent of production sold to international markets. Major export customers include east Asia, China, Indonesia, Japan, Korea, Malaysia, Taiwan, the United States and New Zealand. [More](#)

### Content Slider Panel Content Type

Use this Content Type to present a rotating carousel of textual content messages. Up to five messages will be supported. Options for left and center aligned marketing messages will be made available.

On the Content Details page, if you select **Blog Post** in the **Content Type** menu, the following shows you what to expect with this content type and how to enable it.

**Note:** This Content Type is normally created and managed in Site Editor rather than Email Editor. It's a website function rather than one you might use in an email campaign.

- In the Title field, enter a Title.

- Optionally, in the Description field, enter a Description.
- In the Content Type field, use the dropdown arrow to select **Content Slider Panel**.

The screenshot shows the 'Content Details' form with the following fields and values:

- Title:** Quote from Antoine de Saint-Exupery (Slider)
- Description:** (Empty text area)
- Content Type:** Content Slider Panel (highlighted with a red box)
- Background Contrast:** Light (dropdown menu, highlighted with a red box)
- Content:** It is only with one's heart that one can see clearly.
- By Line:** Antoine de Saint-Exupéry, The Little Prince
- Tags:** 2 items selected (highlighted with a red box)

At the bottom right of the form are 'Close' and 'Save' buttons.

- Optionally, in the Tags field, click the folder icon.
    - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the Background Contrast field, use the dropdown arrow to select Dark or Light.
- In the Content field, enter the text for your slider.
- In the Byline field, enter the author of the slider text.
- Click **Save**.

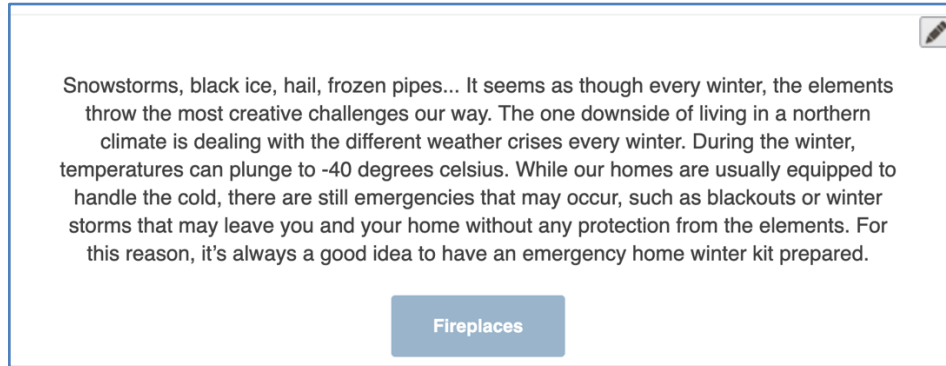
### Email – Content Block Content Type

On the Content Details page, if you select **Email – Content Block** in the **Content Type** menu, the following shows you what to expect with this content type and how to enable it.

- In the Title field, enter a title.
  - Optionally, in the Description field, enter a Description.
- In the Content Type field, using the dropdown arrow, select **Email – Content Block**.

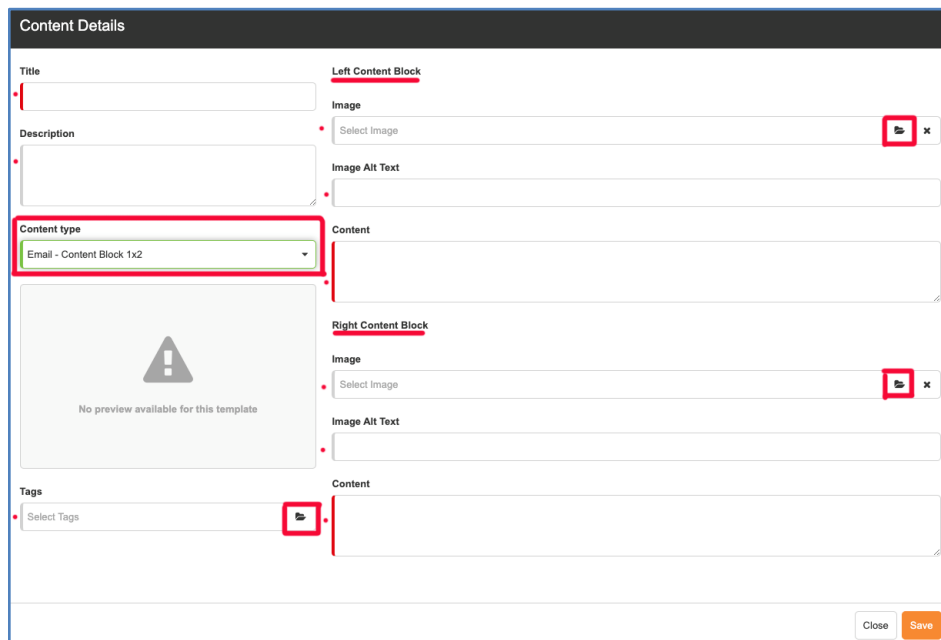
- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the Content field, enter your text.
- Optionally, in the Button Text field, enter button text.
- Optionally, in the Button Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
  - Click **Select**.
- Optionally, in the Button Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
  - When you have chosen your targeted file, click **Select**.
  - Optionally, in the Button Target External URL field, enter a URL.
- On the Content Details page, click **Save**.

Below: sample Email – Content Block content type



### Email – Content Block 1x2 Type

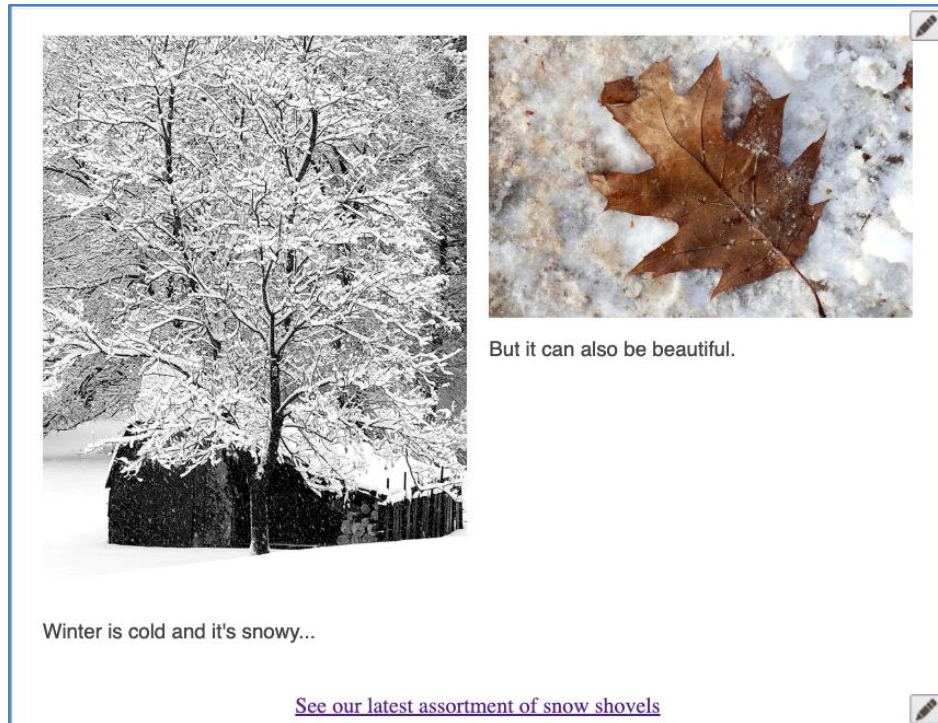
- If you choose Email – Content Block 1x2 Type, you can create your content so it appears in a Left and Right block of text. You can also include images.
- On the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Email – Content Block 1x2**.



- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, under Left Content Block, in the Image field, click the folder icon.

- On the Select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- Optionally, in the Image Alt Text field, enter your text.
- In the Content field, enter your content.
- Under Right Content Block, in the image field, click the folder icon.
- On the Select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- Optionally, in the Image Alt Text field, enter your text.
- In the Content field, enter your Content.
- Click **Save**.

*Below: sample Email – Content Block 1x2 Type*



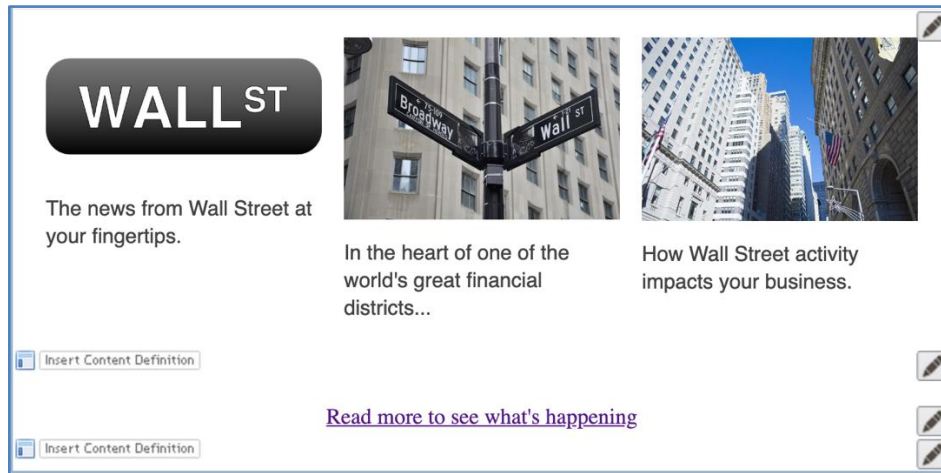
**Email – Content Block 1x3 Type**

- If you choose Email – Content Block 1x3 Type, it will be similar to Email – Content Block 1x2 Type, except that you can create your content, including images, so it appears in three places – a Left, Middle and Right block of text.
- On the Content Details page, in the Title field, enter a title.
- Optionally, enter a Description.
- In the Content type field, select **Email – Content Block 1x3**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, under **Left Content Block**, in the Image field, click the folder icon.
- On the Select Image page, choose an image category.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- Optionally, in the Image Alt Text field, enter your text.
- In the Content field, enter your Content.
- Under **Middle Content Block**, in the image field, click the folder icon.
- On the Select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- Optionally, in the Image Alt Text field, enter your text.

- In the Content field, enter your Content.
- Under **Right Content Block**, in the image field, click the folder icon.
- On the Select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- Optionally, in the Image Alt Text field, enter your text.
- In the Content field, enter your Content.
- Click **Save**.

*Below: sample Email – Content Block 1x3*



#### Email – Hero Image Content Type

- If you choose Email – Hero Image Type, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content Type field, select **Email – Hero Image**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally in the panel on the right, enter a Title.
- Optionally, in the Alt Text field, enter your text.
- Alternately, in the Image field, click the folder icon.
- On the Select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- Click **Save**.

#### Email – Image Aligned Content Type

If you choose the Email – Image Aligned Content type, in the Content Details page, you can opt to enter a Description.

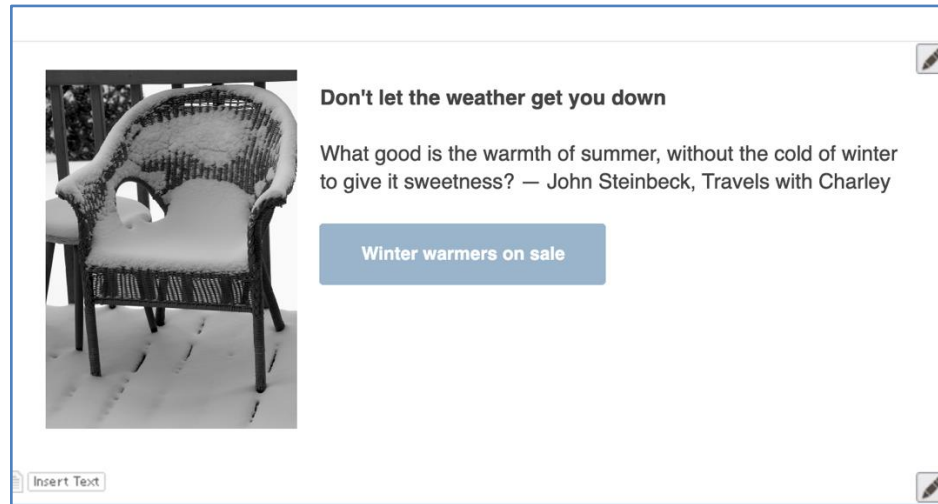
- In the Content type field, select **Email – Image Aligned Content**.

- Optionally, in the Tags field, click the folder icon.
- On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally, in the panel on the right, enter a Title.
- In the Content field, enter your content.
- Optionally, in the Image field, click the folder icon.
- On the Select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (see [Select and Insert an image in the Email Editor](#)).
- Optionally, in the Image Alt Text, enter your text.
- Optionally, in the Image Alignment field, use the dropdown arrow to select Left or Right.

- Optionally, in the Button Text field, enter your text.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
  - Click **Select**.

- Optionally, in the Button Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
  - When you have chosen your targeted file, click **Select**.
  - Optionally, in the Button Target External URL field, enter a URL.
- Click **Save**.

*Below: sample Email – Image Aligned Content*



### Feature Block Type

Use this content type for a supporting image, title and, in some cases, summary content. With this type, a user can link through to underlying content pages for more information. It has a series of content modules.

- If you choose the Feature Block type, on the Content Details page, enter a Title.
- Optionally, in the Description field, enter a description.
- In the Content Type field, select Feature Block.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally, in the panel on the right, enter a Title.
- Optionally, in the Description field, enter a description.
- In the Image field, click the folder icon.
- On the Select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- Optionally, in the Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- Optionally, in the Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Target External URL field, enter the targeted URL.
- Optionally, in the Callout Target Page field, click the folder icon.

- On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- Optionally, in the Callout Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Callout Target External URL field, enter the targeted URL.
- Optionally, in the Callout Button Text field, enter the text.
- Click **Save**.

#### Feature Block 1x2, 1x3, 1x4 and Feature Block 5 Types

If you choose any of these content types, you'll see they are similar. Their differences have to do with how many blocks of content you want to have on a page.

- For each of these features, on the Content Details page, in the title field, enter a title.
- Optionally, in the Description field, enter a description.

- In the Content Type field, use the dropdown arrow to select **Feature Block 1x2**, **Feature Block 1x3**, **Feature Block 1x4**, or **Feature Block 5**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally, in the panel on the right, in the Background Contrast field, use the dropdown arrow to choose Dark or Light.

- Optionally, in the Optional Heading field, enter an optional heading.


For each Feature Block (1x2, 1x3, 1x4 and 5)


- In the Title field for the block, enter a title.


**Left Feature Block**

**Title 1**


**Description 1**


**Image 1**  
  x

**Target Page 1**  
  x

**Target File 1**  
  x

**Target External Url 1**

**Callout Target Page 1**  
  x

**Callout Target File 1**  
  x

**Callout Target External Url 1**

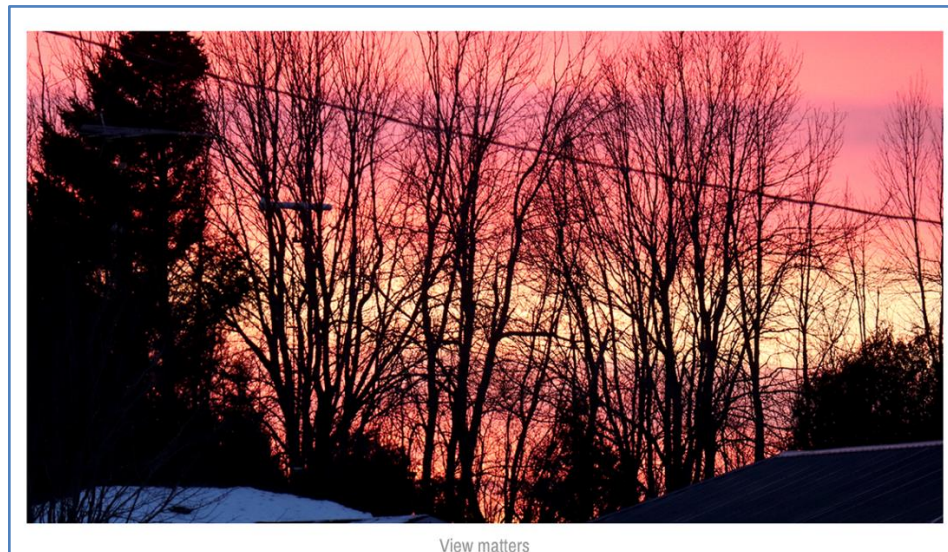
**Callout Button Text 1**

**Callout CSS Class 1**



- Optionally, in the Description field for the block, enter a description.
- In the Image field for the block, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- Optionally, in the Target Page field for the block, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Optionally, in the Target File field for the block, click the folder icon.

- On the Select File page, choose the category where your file resides.
- In the panel on the right, select the file.
  - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Target External URL field for the block, enter the targeted URL.
- Optionally, in the Callout Target Page field for the block, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- Optionally, in the Callout Target File field for the block, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Callout Target External URL field for the block, enter the targeted URL.
- Optionally, in the Callout Button Text field for the block, enter the text.
- Optionally, in the Callout CSS Class field for the block, enter the information.
- When you have entered all the information you want in each Block section, click **Save**.

*Below: sample Feature Block type*






Below: sample Feature Block 1x2 type

 <p>When you're renovating, don't forget your best friend. ... <a href="#">Learn more</a></p>	 <p>Kids can be another challenge when you're renovating. ... <a href="#">Learn more</a></p>
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Below: sample Feature Block 1x3 type

Land of sunshine

 <p>Australia has extraordinarily beautiful beaches ... <a href="#">Learn more</a></p>	 <p>...magnificent flowers ... <a href="#">Learn more</a></p>	 <p>and unusual birds. ... <a href="#">Learn more</a></p>
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Below: sample Feature Block 1x4 type

Internet anywhere you are


 <p>Downtown In major centers worldwide... <a href="#">Learn more</a></p>	 <p>at home... ... <a href="#">Learn more</a></p>	 <p>in rural areas... ... <a href="#">Learn more</a></p>	 <p>and in quiet places. ... <a href="#">Learn more</a></p>
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Below: sample Feature Block 5 type


How to make your back yard sensational




What's happier than daisies?  
[... Learn more](#)




Nothing says summer more than bright orange.  
[... Learn more](#)



Make your garden interesting with the unusual  
[... Learn more](#)



Contrast in a garden is always stunning  
[... Learn more](#)



A water fountain makes a garden seem timeless  
[... Learn more](#)

### Feature Slide Type

- If you choose Feature Slide, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description box, enter a description.
- In the Content Type field, select **Feature Slide**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Title field, enter a title.
- In the Description field, enter a description.
- Optionally in the Text Position field, use the dropdown arrow to select the position of your text.

- Optionally, in the Color Theme field, use the dropdown arrow to select None, Dark, or Light.
- In the Image (Small) field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- In the Image (Large) field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).

- In the Page URL field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Click **Save**.

### Gallery Image Type

- If you choose Gallery Image, on the Content Details page, in the Title field, enter a Title.
- Optionally, in the Description field, enter a description.
- In the Content Type field, select **Gallery Image**.

The screenshot shows the 'Content Details' form with the following fields and actions:

- Title:** A text input field with a folder icon on the left.
- Caption:** A text input field.
- Description:** A text area.
- Image (Small):** A field with a 'Select Image' button and a folder icon on the right.
- Image (Large):** A field with a 'Select Image' button and a folder icon on the right.
- Content type:** A dropdown menu with 'Gallery Image' selected. This field is highlighted with a red box.
- Tags:** A field with a 'Select Tags' button and a folder icon on the right.
- Preview:** A large area with a warning icon and the text 'No preview available for this template'.
- Buttons:** 'Close' and 'Save' buttons at the bottom right.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Caption field, enter your text for a caption.
- In the Image (Small) field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- In the Image (Large) field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- Click **Save**.

## Location type

Use this content type to allow the placement of location name, address, phone and other details for multiple locations on a template. This module includes Google maps integration.

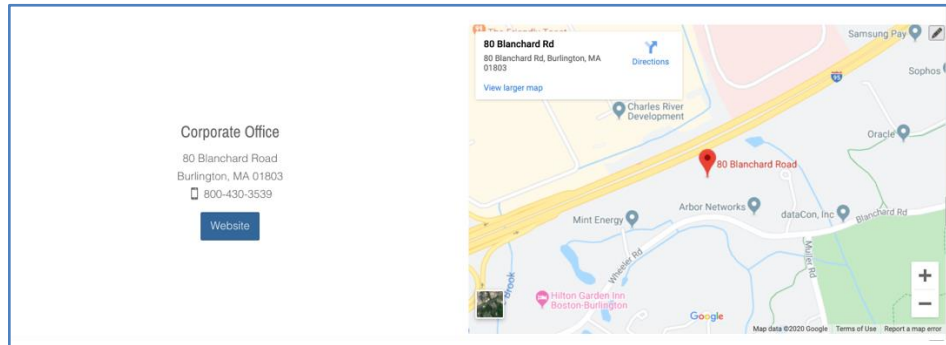
- If you choose Location, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Location**.

The screenshot shows the 'Content Details' form for a 'Location' content type. The form is divided into two columns. The left column contains fields for 'Title', 'Description', 'Content type' (set to 'Location'), 'Tags' (with a folder icon), and a preview area showing a warning icon and the text 'No preview available for this template'. The right column contains fields for 'Background Contrast' (dropdown), 'Location Name', 'Description', 'Address Line 1', 'Address Line 2', 'City', 'State', 'Zip Code', 'Phone 1', 'Phone 2', 'Direction Link', 'Embedded Map URL', 'Embedded Map Position' (dropdown), and 'Website URL'. Red boxes highlight the 'Background Contrast' dropdown, the 'Content type' dropdown, the folder icon in the 'Tags' field, and the 'Embedded Map Position' dropdown. At the bottom right, there are 'Close' and 'Save' buttons.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Background Contrast field, use the dropdown arrow to select Dark or Light.
- In the Location Name field, enter the information.

- Optionally, in the Description field, enter a description.
- In the Address Line 1 field, enter the address.
- Optionally, in the Address Line 2, enter further address details.
- In the City field, enter the city name.
- In the State field, enter the state name.
- In the Zip Code field, enter the zip code.
- Optionally, in the Phone1 field, enter a phone number.
- Optionally, in the Phone2 field, enter an additional phone number.
- Optionally, in the Direction Link field, enter a link.
- Optionally, in the Embedded Map URL field, enter a URL.
- In the Embedded Map Position field, use the dropdown arrow to select Left or Right.
- Optionally, in the Website URL field, enter the URL.

*Below: sample Location type*



### Main Slider Panel

Use this content type for presenting a rotating carousel of large billboard banners and marketing text with a call-to-action.

- If you choose Main Slider Panel, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Main Slider Panel**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally, in the panel on the right, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Text Position field, use the dropdown arrow to select a position.

- In the Text Background field, use the dropdown arrow to select none, dark, or light.
- In the Main Image field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- In the Mobile Image field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).

- In the Target Page field, click the folder icon.
- Optionally, in the Target Page field for the block, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Optionally, in the Target File field for the block, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Target External URL field for the block, enter the targeted URL.
- Click **Save**.

### News Type

- If you choose News, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **News**.

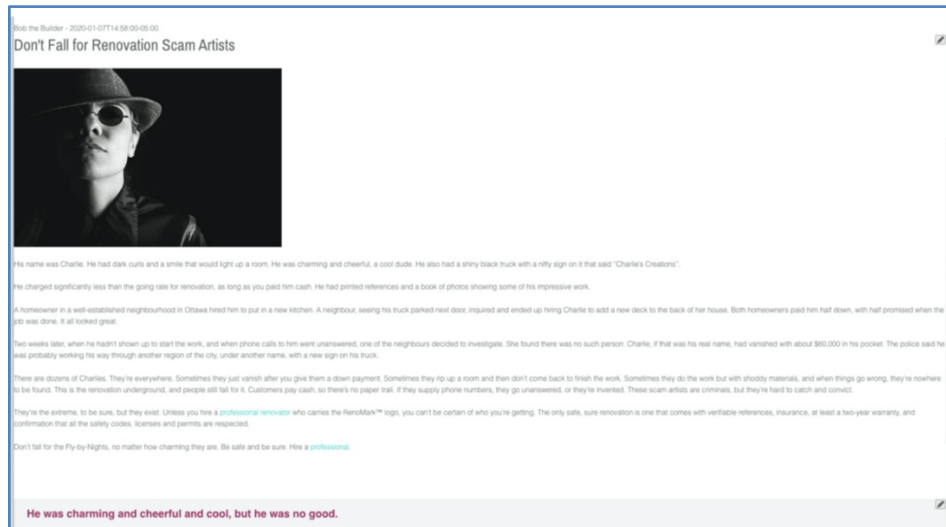
The screenshot shows the 'Content Details' form with the following elements:

- Title** and **Headline** text input fields.
- Description** text area.
- Author Name** text input field.
- Post Date** field with a calendar icon and a 'Select Date & Time' button.
- Content type** dropdown menu, currently set to 'News', highlighted with a red box.
- Tags** field with a 'Select Tags' button and a folder icon, also highlighted with a red box.
- Full Copy** field containing a Rich Text Editor.
- A warning icon and the text 'No preview available for this template' below the Content type field.
- 'Close' and 'Save' buttons at the bottom right.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Headline field, enter a headline.
- Optionally, in the Author Name field, enter the name of the author.
- Optionally, in the Post Date, click the calendar icon to select a date.
- Optionally, in the Full Copy field, using the [Rich Text](#) Editor, enter your news copy (text).

- Click **Save**.

*Below: sample News Content type*



### Social Feed Item Type

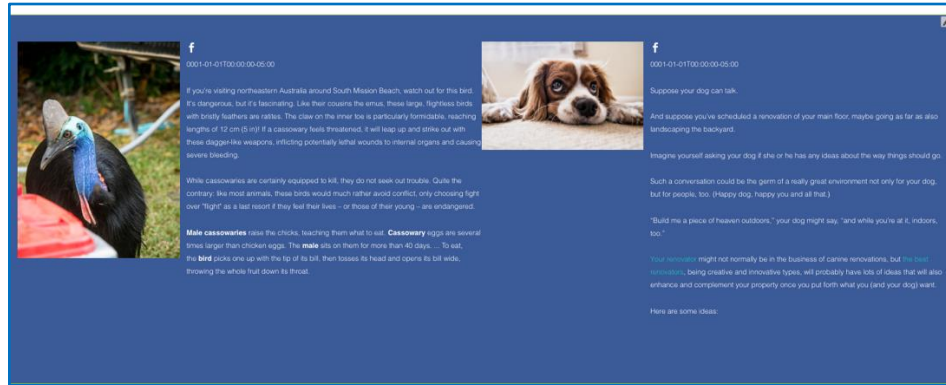
Use this content type to display Facebook and Twitter feeds.

- If you choose Social Feed Item type, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Social Feed Item**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Social Network field, use the dropdown arrow to select the social network.

- In the Image field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (see [Select and Insert an image in the Email Editor](#)).
- Optionally, in the Username field, enter the username.
- Optionally, in the Date field, click the calendar and clock icons to select the date and time.
- Under Content, use the [Rich Text](#) editor to enter your content.
- Click **Save**.

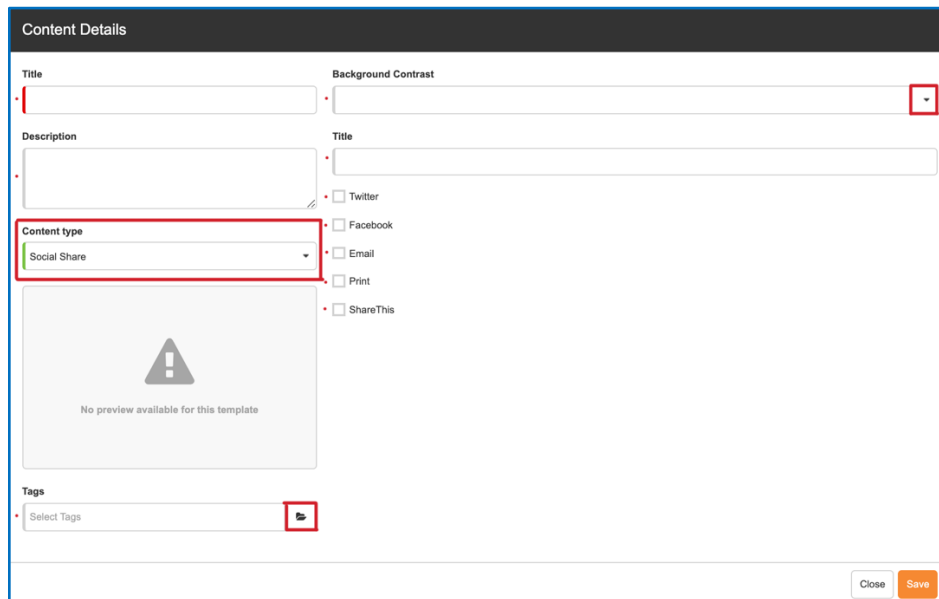
*Below: sample Social Feed Item type*



### Social Share Type

Use this content type to display social sharing on a template with a “ShareThis” account plugin.

- If you choose Social Share, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Social Share**.



- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally, in the panel on the right, in the Background Contrast field, use the dropdown arrow to select Dark or Light.
- Optionally in the Title field, enter a title.
- Optionally, select the check boxes beside

- Twitter
- Facebook
- Email
- Print
- Share This
- Click **Save**.

*Below: sample Social Share type*



### Spotlight Type

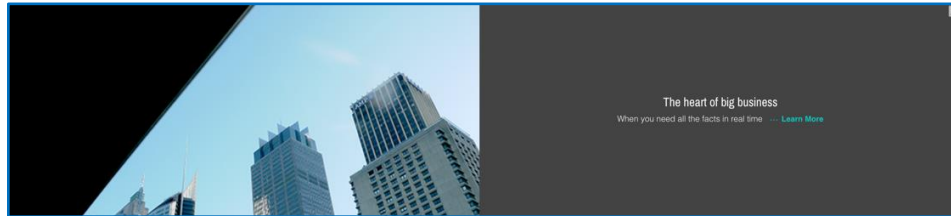
Use this content type to display a high profile image and content with text and background, and for including an image and hyperlink on a template.

- If you chose Spotlight, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Spotlight**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally, in the panel on the right, in the Background Contrast field, use the dropdown arrow to select Dark or Light.
- In the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Main Image field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (Please see [Select and Insert an image in the Email Editor](#)).
- In the Image Position field, use the dropdown arrow to select left or right.
- Optionally, in the Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Optionally, in the Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.

- In the panel on the right, select the file.
  - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Target External URL field, enter the targeted URL.
- Optionally, in the Callout Button Text field, enter the text.
- Optionally, in the Callout CSS Class field, enter the information.
- Optionally, in the Callout Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Optionally, in the Callout Target External URL field, enter the URL.
- Click **Save**.

*Below: sample Spotlight type*



### Tab Item Type

Use this content type to display content in a tabular format on a template; as each tab's information is populated, it dynamically generates within the page where the module is placed.

- If you choose Tab Item, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Tab Item**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Tab Name field, enter the tab name.
- Under Content, use the [Rich Text](#) Editor to enter your content.

*Below: sample Tab Item type*

## Video Type

Use this content type to allow easy inclusion of videos. Video content can be stored on third-party platforms or included natively on the Bridgeline platform and then inserted into a video content definition.

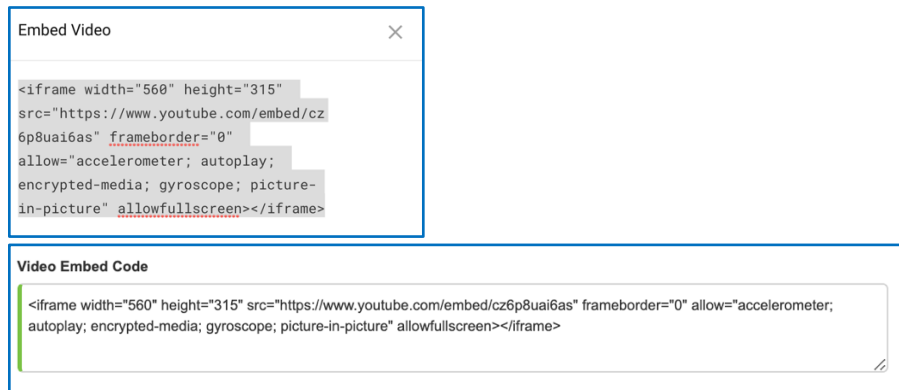
- If you choose Video, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Video**.

The screenshot shows the 'Content Details' form for a video content type. The form is organized into several sections:

- Title:** A text input field.
- Description:** A text area.
- Content type:** A dropdown menu currently set to 'Video'.
- Tags:** A 'Select Tags' button with a folder icon.
- Background Contrast:** A dropdown menu.
- Content:** A rich text editor with a toolbar and a 'Words: 0' counter.
- Video Embed Code:** A text area.
- Video Position:** A dropdown menu.
- Target Page:** A 'Select Page' button with a folder icon and a close button (x).
- Target File:** A 'Select File' button with a folder icon and a close button (x).
- Target External Uri:** A text input field.
- Callout Button Text:** A text input field.
- Callout Target Page:** A 'Select Page' button with a folder icon and a close button (x).
- Callout Target File:** A 'Select File' button with a folder icon and a close button (x).
- Callout Target External Uri:** A text input field.

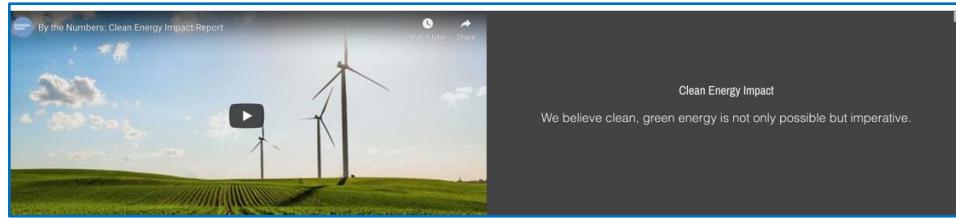
At the bottom right, there are 'Close' and 'Save' buttons.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Background Contrast, use the dropdown arrow to select Dark or Light.
- Optionally, in the Title field, enter a title.
- Optionally, under Content, use the [Rich Text](#) Editor to create your text.
- In the Video Embed Code field, enter the embed code for your video.



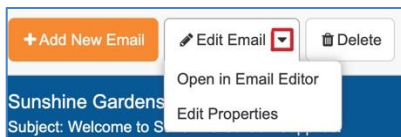
- In the Video Position field, use the dropdown arrow to select left or right.
- Optionally, in the Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Optionally, in the Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Target External URL field, enter the targeted URL.
- Optionally, in the Callout Button Text field, enter the text.
- Optionally, in the Callout CSS Class field, enter the information.
- Optionally, in the Callout Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Optionally, in the Callout Target File, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Callout Target External URL field, enter the URL.
- Click **Save**.

### Sample Video Item type

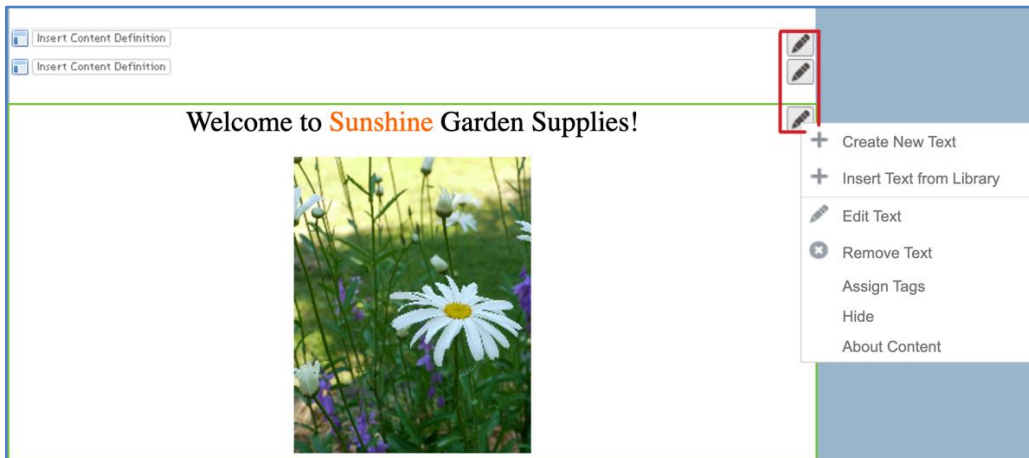


### Edit an Email Campaign

- In the Email Campaign Group panel, select a group.
- In the panel on the right, select a campaign.
- Click Edit Email and choose one of two options: **Open in Email Editor** or **Edit Properties**.



- If you choose Edit Properties, on the Create Email Details page, make any revisions. Click Save.
- If you choose Open in Email Editor, on the Email Editor page, click the edit icons to make any revisions.

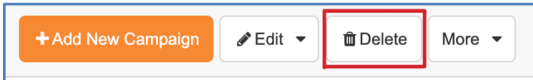


- At the top of the Email Editor page, click **Save**.

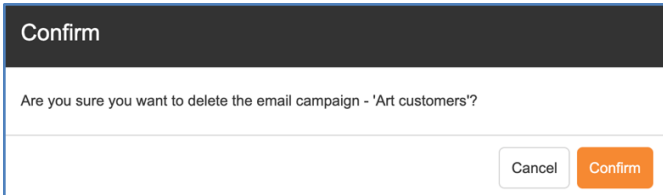
### Delete an Email Campaign

- In the Email Campaign Group panel, select a group.
- In the panel on the right, select a campaign.

- Click **Delete**.



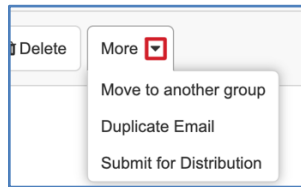
- In the Confirm dialog, click **Confirm**, or Cancel to return to the Manage Email Campaigns page.



### Use the More Menu

Use the “More” dropdown arrow to:

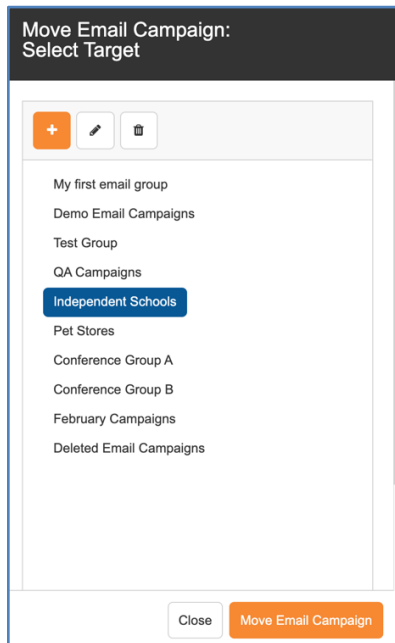
- Move to another group
- Duplicate Email
- Submit for Distribution



### Move Campaign to another group

- To move a campaign to another group, in the More dropdown menu, select **Move to another group**.

- In the Move Email Campaign: Select Target dialog, select a group.



- Click **Move Email Campaign**.

### **Duplicate Email Campaign**

- To Duplicate an Email Campaign, in the More dropdown menu, select **Duplicate Email**.
- In the Duplicate Email Campaign: Select Target dialog, select a group.

- Click **Duplicate Email Campaign**.

The dialog box has a dark header with the text "Duplicate Email Campaign: Select Target". Below the header is a section titled "Enter a Title" with a text input field containing "Art customers - (duplicate)". Underneath the input field is a toolbar with three icons: a plus sign, a pencil, and a trash can. A list of email groups follows, including "My first email group", "Demo Email Campaigns", "Test Group", "QA Campaigns", "Independent Schools", "Pet Stores", "Conference Group A", "Conference Group B" (which is highlighted with a blue background), "February Campaigns", and "Deleted Email Campaigns". At the bottom of the dialog are two buttons: "Close" and "Duplicate Email Campaign".

- In the Confirm dialog asking if you'd like to duplicate the recipients as well, click Confirm; or cancel to return to the Manage Email Campaigns page.

The dialog box has a dark header with the text "Confirm". Below the header is a text area containing the question "Would you like to duplicate the recipients as well?". At the bottom right of the dialog are two buttons: "Cancel" and "Confirm".

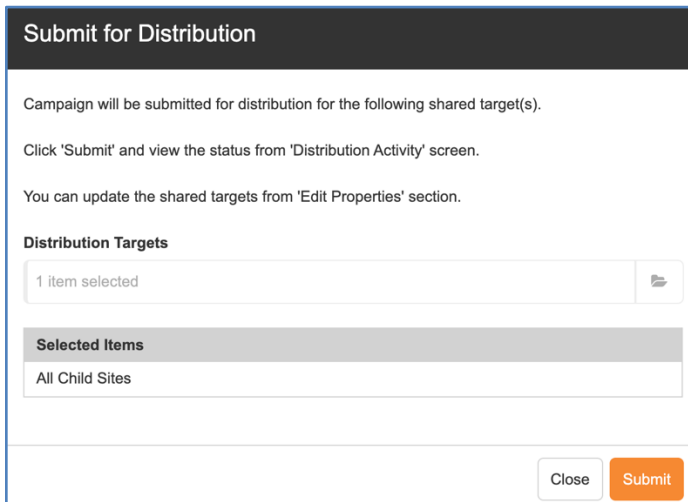
- A dialog confirms this.

The dialog box has a dark header with the text "Success". Below the header is a text area containing the message "Email Campaign 'Art customers' duplicated as 'Art customers - (duplicate)' successfully.". At the bottom right of the dialog is a "Close" button.

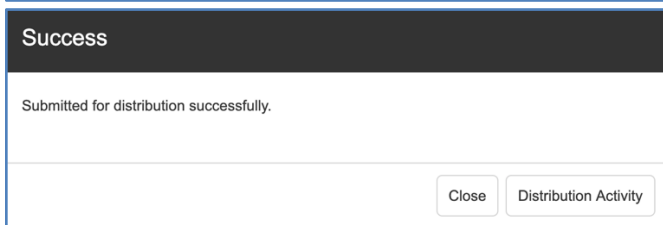
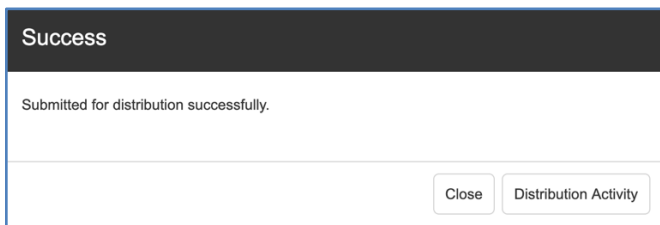
### Submit for Distribution

- To submit an Email Campaign for distribution, in the More dropdown menu, select **Submit for Distribution**.

- In the Submit for Distribution dialog, click **Submit**.



- Optionally, in the Success dialog, to see the status of distribution, click **Distribution Activity**.



## Using the Rich Text Editor in the Email Editor

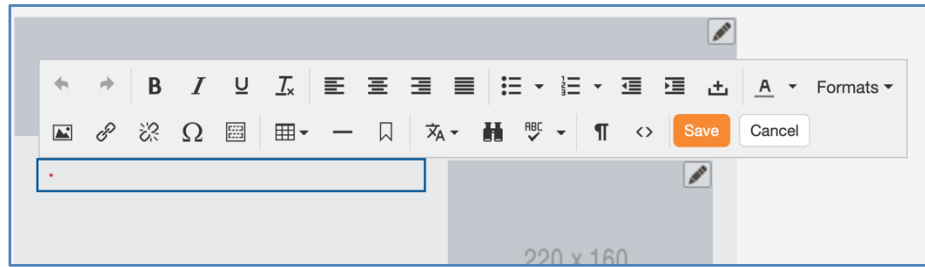
[Go to [Content](#)]

[Go to [Automation Flows](#)]

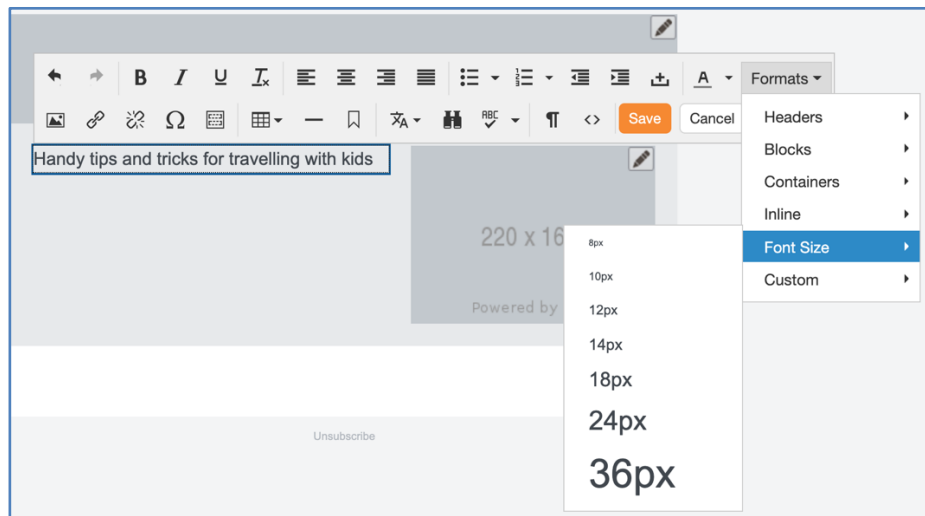
[Go to [Content Library – Content Options](#)]

If you are Creating Content or Text in the Email Editor, you will usually have the option of using the Rich Text Editor.

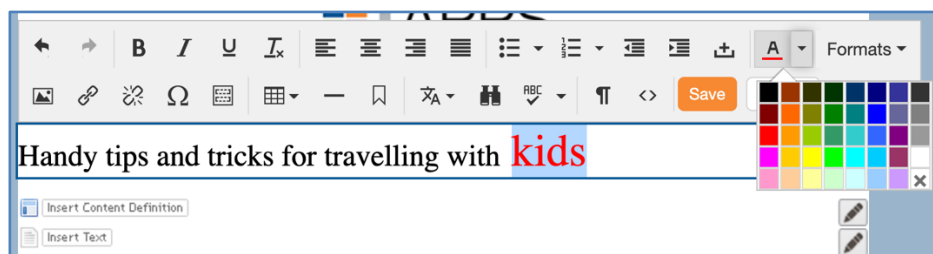
- In the text box beneath the Rich Text Editor icon menu, enter your text.

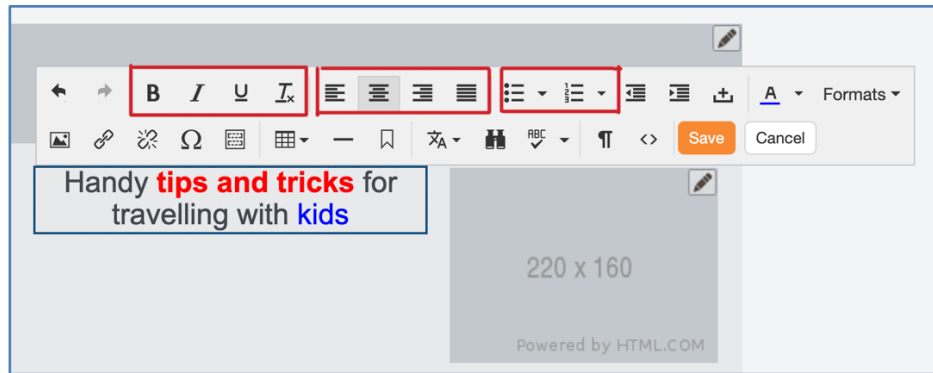


- Use the Formats dropdown menu for a variety of options, including size.

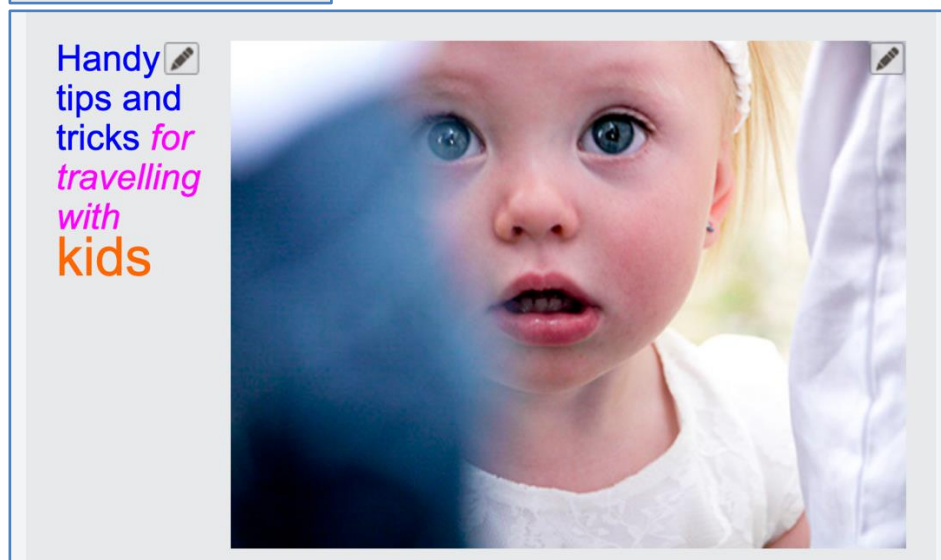
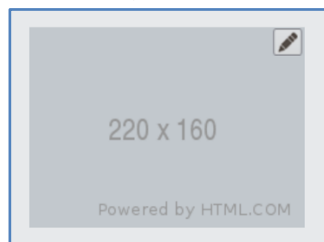


- Use the icons to determine text colour, bullets, numbers, text justification, font options such as bold, italics, and underline.





- If you would like to [add an image](#), rather than using the rich text editor, use the edit icon in the template where images are meant to be placed.



### Select and insert an image in the Email Editor

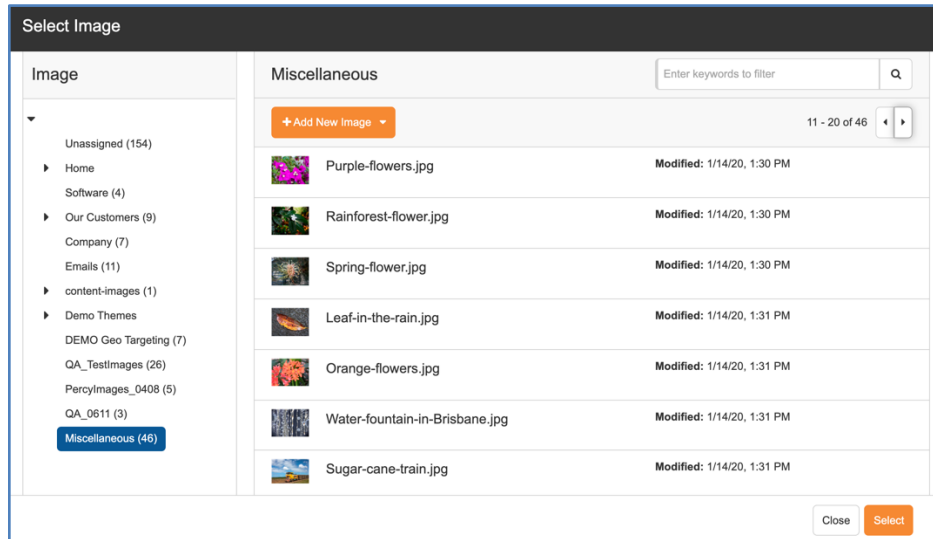
[Go to [Rich Text Editor](#)]

[Go to [Content](#)]

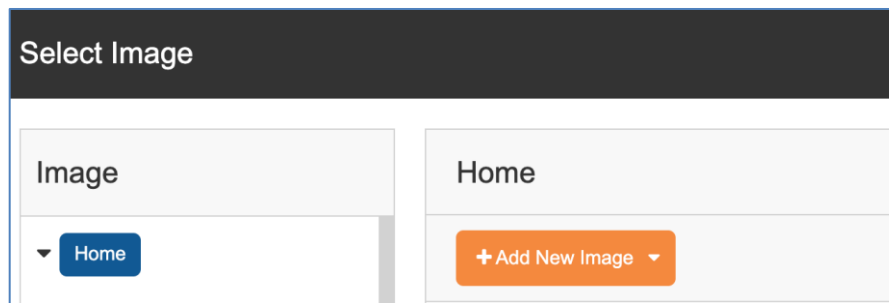
[Go to [Automation Flows](#)]

[Go to [Content Library – Content Type Options](#)]

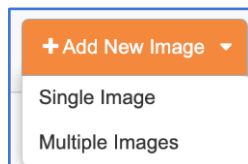
- To insert an image, click the image icon and select **Insert Image from Library**.
- On the Select Image page, in the menu panel, select a category.
- In the panel on the right, select an image. Click **Select**.



- Optionally, to an image to your list, click **Add New Image**.
- On the Select Image page, in the Image panel, select a category.
- In the panel on the right, click **Add New Image**.



- Use the dropdown arrow to select **Single Image**.



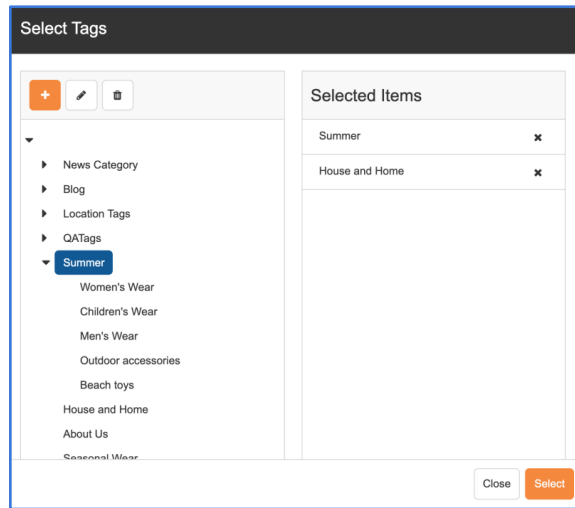
- On the File Details page, in the File Name field, click the folder icon to browse for an image on your computer or device.

- The name of the file is automatically populated as the Title of the photo.

- Optionally, enter:
  - Alt Text
  - Description
- Optionally, in the Tags field, click the folder icon.

- On the Select Tags page, select an item.

- In the Selected Items panel, click **Select**.



- On the File Details page, click **Save**.
- On the Select Image page, select the new image from the list.
- Click **Select**.
- Optionally, in the Select Image Dialog, enter:
  - Alt Text
  - CSS Class

- Dimensions and Margins (in pixels).

**Select Image**

Type  
Image Library

Image Url  
/Image Library/Emails/B.C.-Daisies--low-res-.jpg

Alt Text

CSS Class

Dimensions  
width height  
Original dimensions: 600x750

Margin (px)  
top right bottom left

Close Insert Image

- Click **Insert Image**.

[Return to [Rich Text Editor](#)]

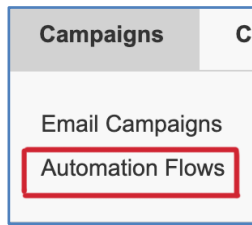
[Return to [Content](#)]

## Automation Flows

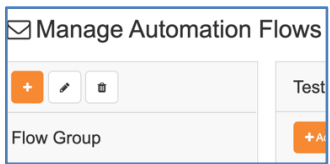
Once your email campaigns are ready to go, there are many steps you can take to personalize them, control their flow and ensure maximum effect with your audience. Automation flows allow you to control, through automated actions and reactions, how you encourage your audience to take further steps.

### Manage Automation Flow Groups and Flows

- Under Campaigns, select **Automation Flows**.

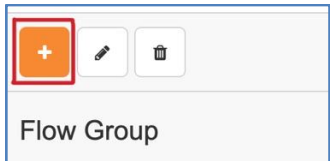


- On the Manage Automation Flows page, use the icons at the top of the panel on the left to create, edit and delete your Flow Groups.

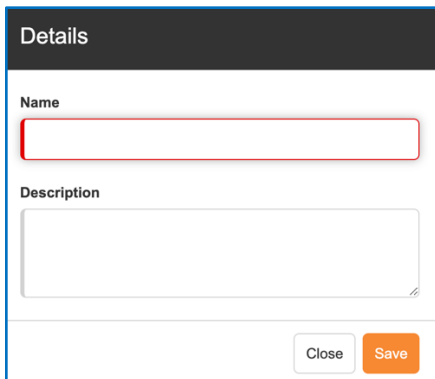


### Add a Flow Group

- In the Flow Group panel on the left, click the Add icon.



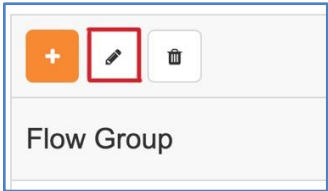
- In the Details dialog, in the Name field, enter a name.



- Optionally, in the Description field, enter a description.
- Click **Save**, or **Close** to return to the Manage Automation Flows page.

### Edit a Flow Group

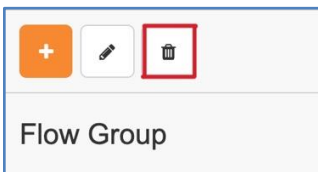
- In the Flow Group panel on the left, click the Edit icon.



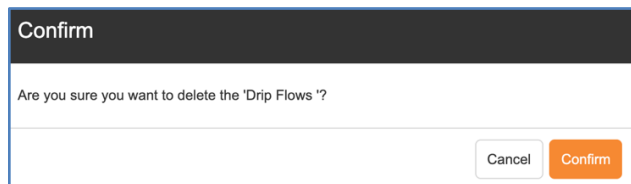
- In the Details dialog, make any revision.

### Delete a Flow Group

- In the Flow Group panel on the left, click the Delete icon.

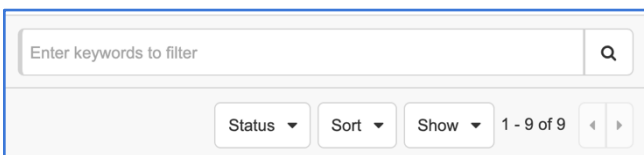


- In the Confirm dialog, click **Confirm**, or **Cancel** to return to the Manage Email Campaigns page.

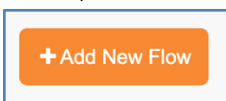


### Add a new automation flow

On the Manage Automation Flows page, in the section on the right for automated flows, a search panel helps you to find your flows by Keyword or by using the Status, Sort and Show menus.



- In the Flow Group panel, select a group.
- In the panel on the right, click **Add New Flow**.

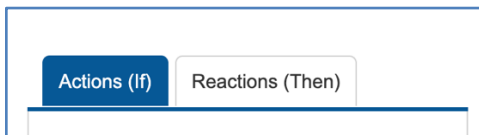


- On the Create Flow page, in the Flow Name field, enter a name.

- Optionally, in the Description field, enter a description.
- In the Start Date/Time field, use the calendar and clock icons to select a starting date and time.
- Optionally, in the End Date/Time field, use the calendar and clock icons to select an end date and time.
- Optionally, in the TimeZone field, use the dropdown arrow to select a time zone.
- Click **Create Flow** or **Close** to return to the Manage Automation Flows page.

### The Flow Editor

- On the Edit Flow page for the new flow, use the **Actions (If)** and **Reactions (Then)** tabs to set up your conditions for the flow.



The following table outlines your options.

Options for Actions (If)	Options for Reactions (Then)
Email Sent *Must be the only step in the flow.	Send Email
Email opened	Send Internal Notification
Form Submitted	Assign Contact Attribute
Lead Score Reached	Assign Lead Points
Link (Tracked) Clicked	Add to Static List
Page Viewed	Remove from Static List

External Page Viewed	Add to SF Campaign *This is disabled for flows containing an "Email Sent" action.
File Downloaded	End Flow
Sign in Completed	Notify Contact Owner
Registration Completed	Trigger Conversion
User Opted in for Emails	Time Delay *Has to go first before Send Email
User Added to Static List *Must be first step in the flow.	
User in Audience List *Must be first step in the flow.	

**Note:** You can click **Save** at any point and the page will be saved but not activated.

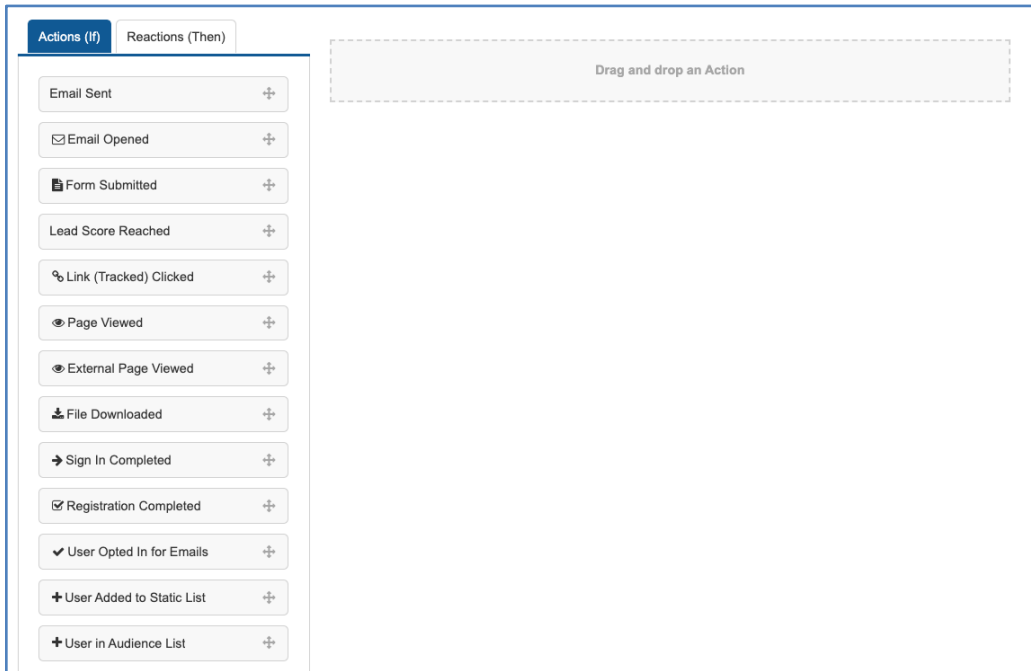
**Success**

Flow saved successfully and will not go live until activated.

Close
Go to Manage Flows

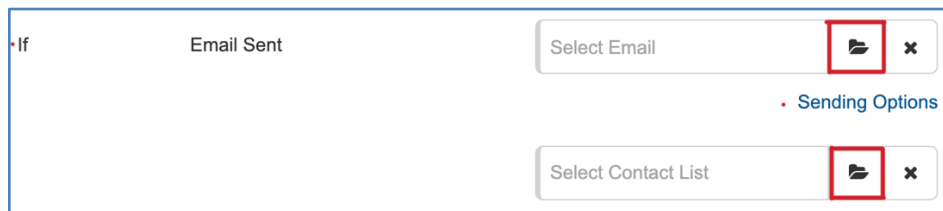
## Flow Actions

- Select an item from the Actions (If) list and drag it to the panel on the right.

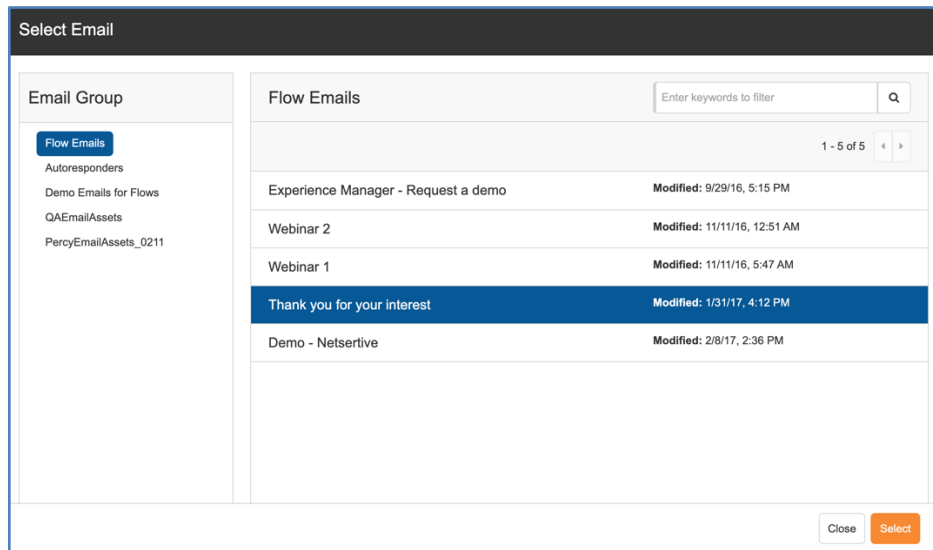


### Action: [If] Email Sent

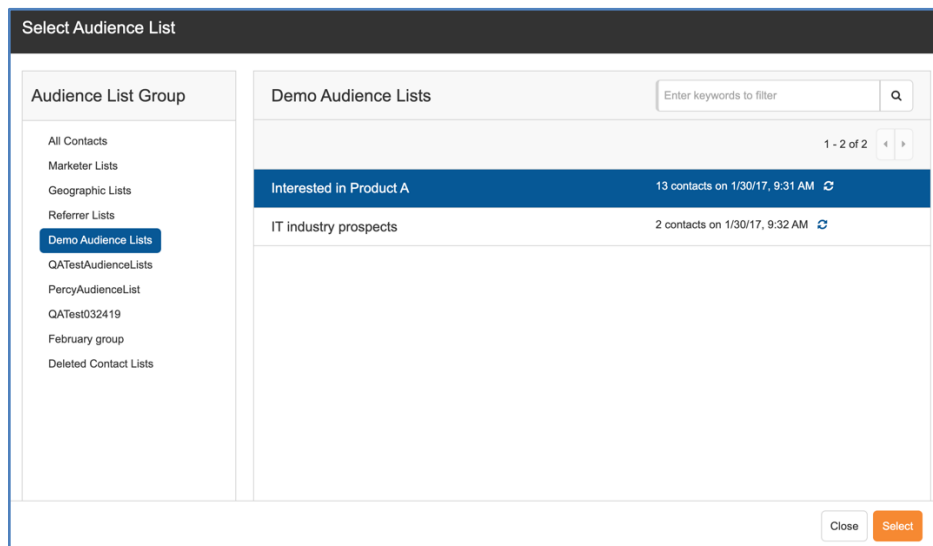
- **Note:** Email Sent is unlike the others in that it must be the only action in the flow.
- Under the Actions (If) tab, drag and drop Email Sent to the panel on the right.
- In the panel on the right, in the Select Email field, click the folder icon to select the email content you would like to use.



- On the Select Email page, select an Email Group and then an email from the panel on the right. Click **Select**.



- In the Select Content List, click the folder icon to select your Audience List.
- On the Select Audience List page, select an Audience List Group and then a list from the panel on the right. Click **Select**.



- Optionally, click **Sending Options**.

- In the Email Sending Options dialog, select your options.

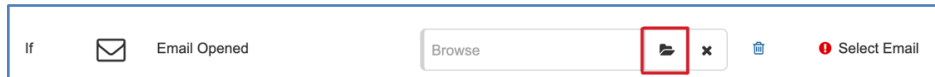
- Select or leave clear the check boxes beside:
  - Only send email during certain days and hours
  - If you choose “Only send email during certain days and hours”, select the check boxes beside your choices for **Day of the Week**.
- In the Start Time field, click the clock icon to determine a start time
- In the End Time field, click the clock icon to determine an end time
- In the Time Zone field, use the dropdown arrow to select a time zone.
- Click **Save** (or Close to return to the Edit Flow page).
- On the Edit Flow page, add more Reactions (but no Actions).

• **Note:** If you would like to add Reactions to this Action (Send Email), the first reaction must be [Time Delay](#).

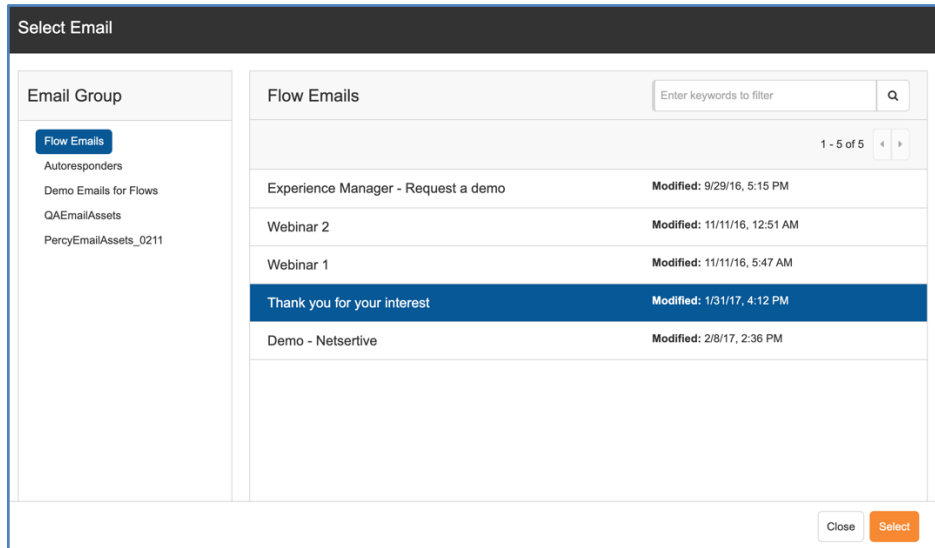
- Click **Save** or **Activate**.

#### Action: [If] Email Opened

- Under the Actions (If) tab, drag and drop **Email Opened** to the panel on the right.
- In the panel on the right, in the Browse field, click the folder icon to select an email.

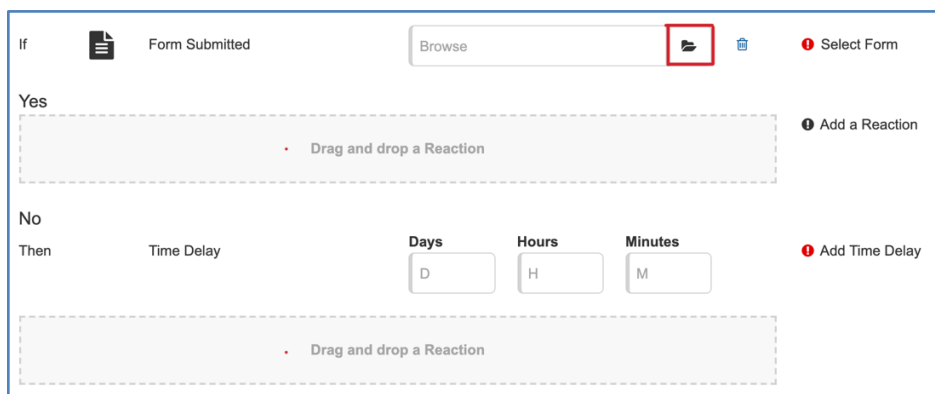


- On the Select Email page, in the panel on the left, select an Email Group. In the panel on the right, select an email. Click **Select**.

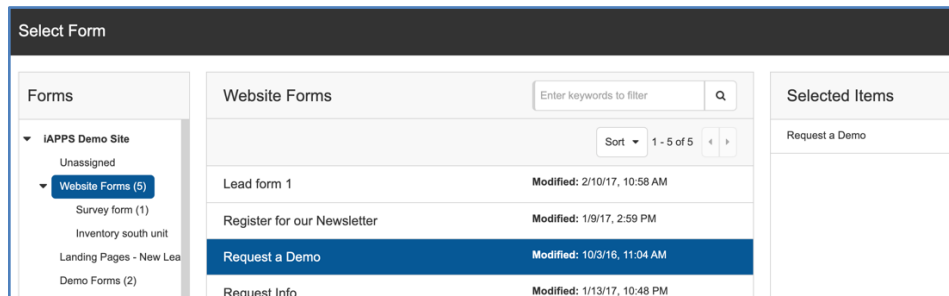


#### Action: [If] Form Submitted

- Under the Actions (If) tab, drag and drop **Form Submitted** to the panel on the right.
- In the panel on the right, in the Browse field, click the folder icon to select a form.



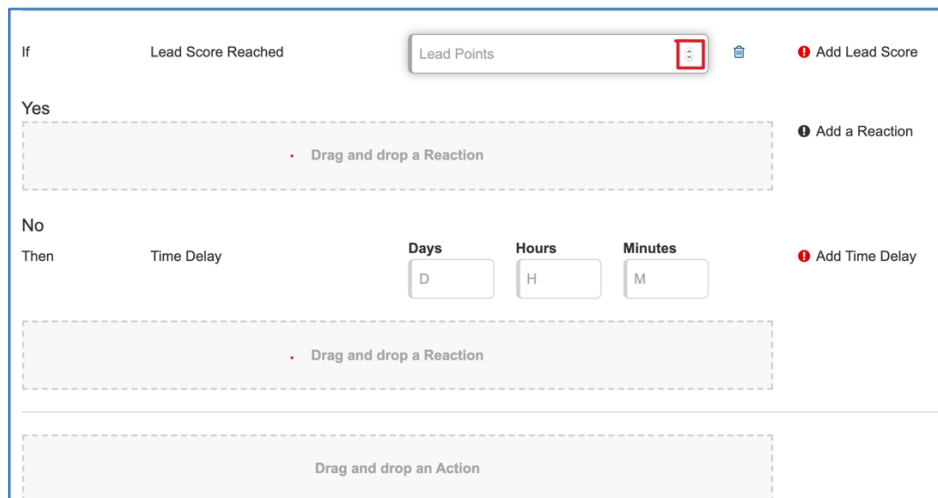
- On the Select Form page, in the panel on the left, select a category under Forms. In the panel on the right, select a form. Click **Select**.



- Optionally, under “Yes”, select the Reactions (Then) tab to drag and drop a reaction or reactions. (See [Flow Reactions.](#))
- Optionally, under “No”, add a time delay using the fields in the Time Delay reaction; and then add a reaction.
- To add another action, return to the Actions tab.

**Action: [If] Lead Score Reached**

- Under the Actions (If) tab, drag and drop **Lead Score Reached** to the panel on the right.
- In the Lead Points field, use the arrows to enter the information.



- Optionally, under “Yes”, select the Reactions (Then) tab to drag and drop a reaction or reactions. (See [Flow Reactions.](#))
- Optionally, under “No”, add a time delay using the fields in the Time Delay reaction; and then add a reaction.
- To add another action, return to the Actions tab.

**Action: [If] Link (Tracked) Clicked**

- Under the Actions (If) tab, drag and drop **Link (Tracked) Clicked** to the panel on the right.

- In the Lead Points field, click the folder icon to select a Link.

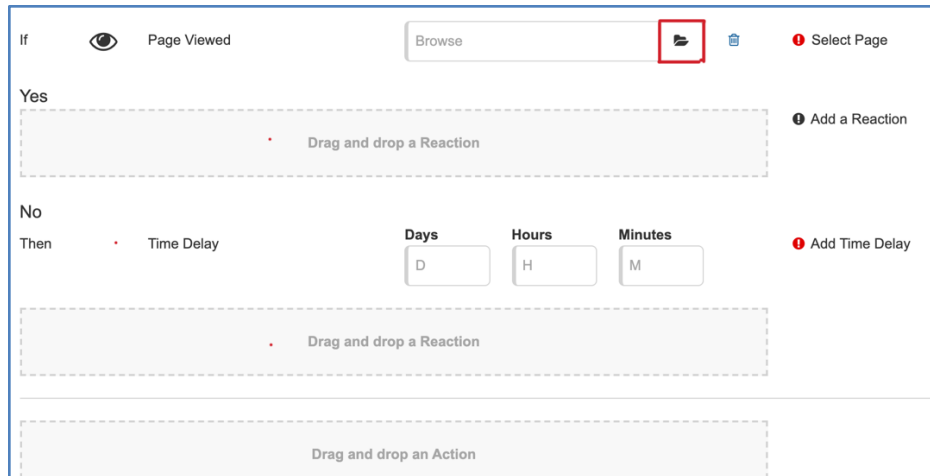
- On the Select Link page, from the panel on the left, select a Link Group.
- From the Links panel on the right, select a link. Click **Select**.

Optionally, under “Yes”, select the Reactions (Then) tab to drag and drop a reaction or reactions. (See [Flow Reactions](#).)

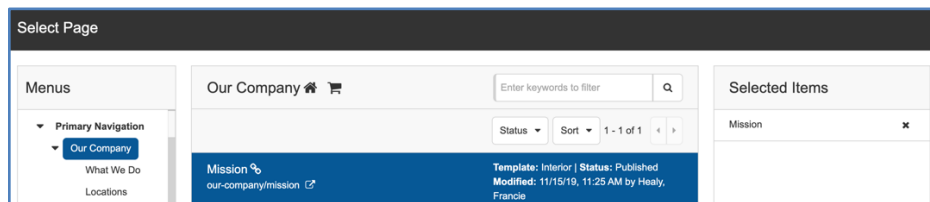
- Optionally, under “No”, add a time delay using the fields in the Time Delay reaction; and then add a reaction.
- To add another action, return to the Actions tab.

**Action: [If] Link (Tracked) Clicked**

- Under the Actions (If) tab, drag and drop **Page Viewed** to the panel on the right.
- In the Browse field, click the folder icon to select a Page.



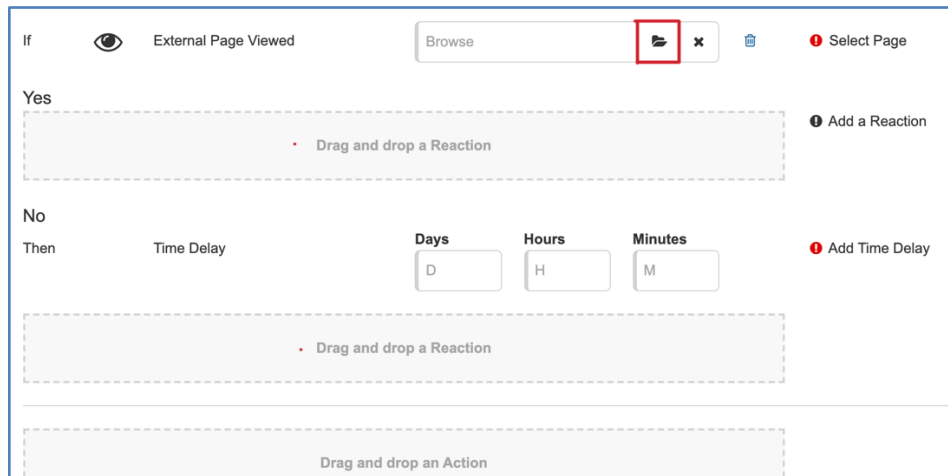
- In the panel on the left under Menus, select a category.
- In the panel on the right, select a page.



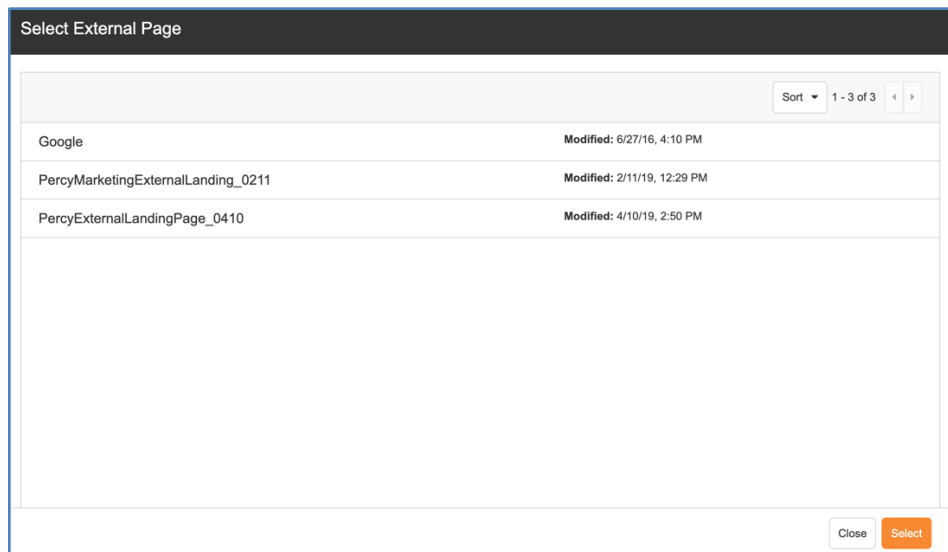
- In the Selected Items panel, click **Select**.
- Optionally, under “Yes”, select the Reactions (Then) tab to drag and drop a reaction or reactions. (See [Flow Reactions](#).)
- Optionally, under “No”, add a time delay using the fields in the Time Delay reaction; and then add a reaction.
- To add another action, return to the Actions tab.

**Action: [If] External Page Viewed**

- Under the Actions (If) tab, drag and drop **External Page Viewed** to the panel on the right.
- In the Browse field, click the folder icon to select a Page.



- On the Select External Page, choose a page. Click **Select**.

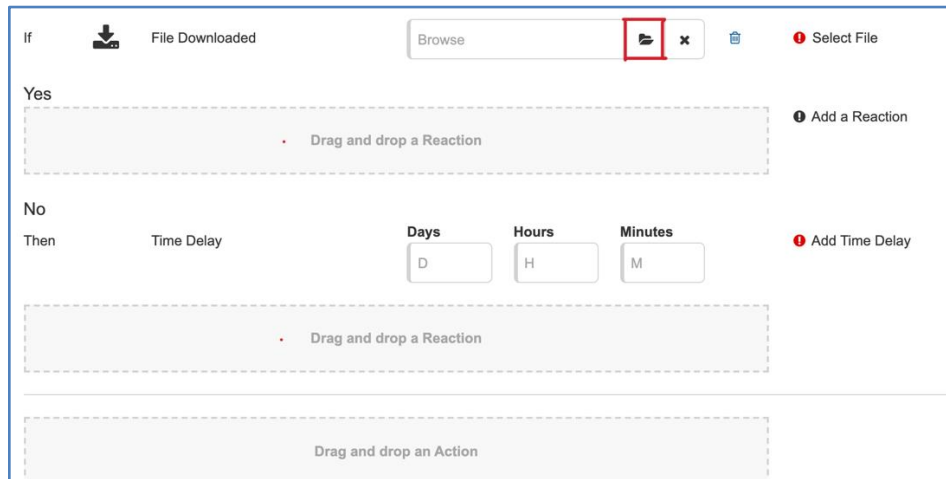


- Optionally, under “Yes”, select the Reactions (Then) tab to drag and drop a reaction or reactions. (See [Flow Reactions](#).)
- Optionally, under “No”, add a time delay using the fields in the Time Delay reaction; and then add a reaction.
- To add another action, return to the Actions tab.

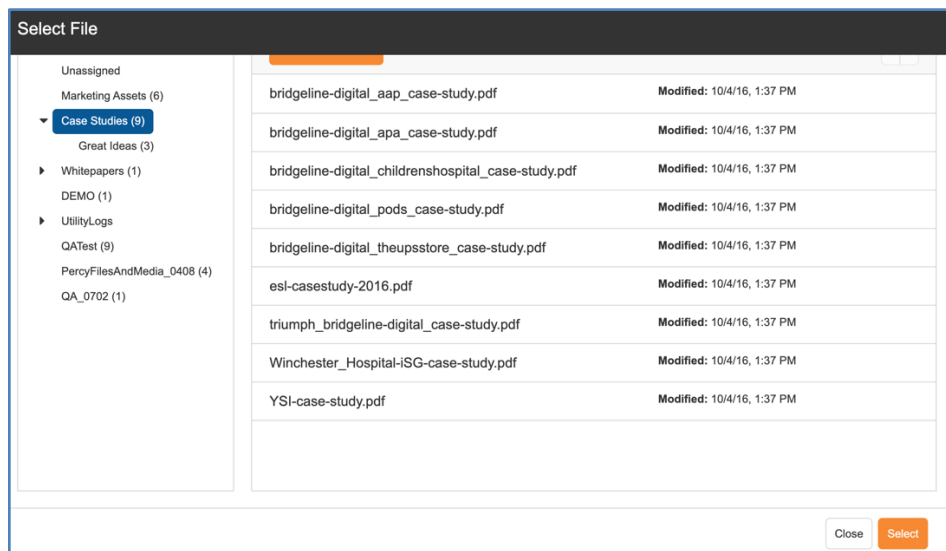
**Action: [If] File Downloaded**

- Under the Actions (If) tab, drag and drop **File Downloaded** to the panel on the right.

- In the Browse field, click the folder icon to select a File.



- On the Select File page, in the panel on the left under File, select a category.
- In the panel on the right, select a file. Click **Select**.



- Optionally, under “Yes”, select the Reactions (Then) tab to drag and drop a reaction or reactions. (See [Flow Reactions](#).)
- Optionally, under “No”, add a time delay using the fields in the Time Delay reaction; and then add a reaction.
- To add another action, return to the Actions tab.

**Action: [If] Sign In Completed**

- Under the Actions (If) tab, drag and drop **Sign In Completed** to the panel on the right.
- Optionally, under “Yes”, select the Reactions (Then) tab to drag and drop a reaction or reactions. (See [Flow Reactions](#).)

- Optionally, under “No”, add a time delay using the fields in the Time Delay reaction; and then add a reaction.
- To add another action, return to the Actions tab.

**Action: [If] Registration Completed**

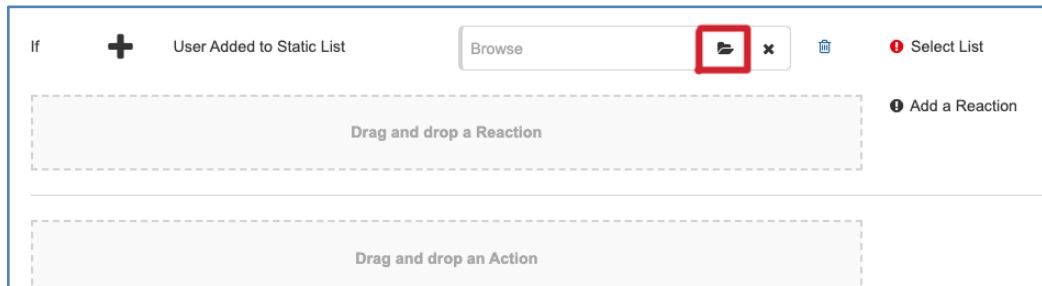
- Under the Actions (If) tab, drag and drop **Registration Completed** to the panel on the right.
- Optionally, under “Yes”, select the Reactions (Then) tab to drag and drop a reaction or reactions. (See [Flow Reactions](#).)
- Optionally, under “No”, add a time delay using the fields in the Time Delay reaction; and then add a reaction.
- To add another action, return to the Actions tab.

**Action: [If] User Opted In for Emails**

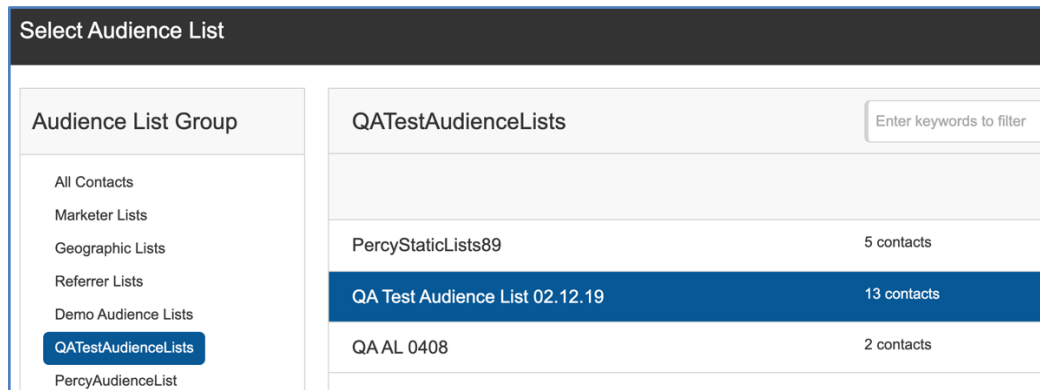
- Under the Actions (If) tab, drag and drop **User Opted In for Emails** to the panel on the right.
- Optionally, under “Yes”, select the Reactions (Then) tab to drag and drop a reaction or reactions. (See [Flow Reactions](#).)
- Optionally, under “No”, add a time delay using the fields in the Time Delay reaction; and then add a reaction.
- To add another action, return to the Actions tab.

**Action: [If] User Added to Static List**

- **Note:** If you use this Action, it must be the first step in the flow.
- Under the Actions (If) tab, drag and drop **User Added to Static List** to the panel on the right.
- In the Browse field, click the folder icon to select an Audience List.



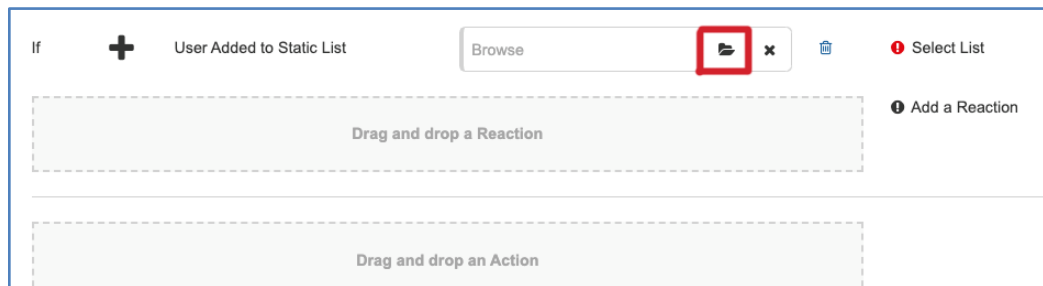
- In the panel on the left, under Audience List Group, select a group.
- In the panel on the right, select a list. Click **Select**.



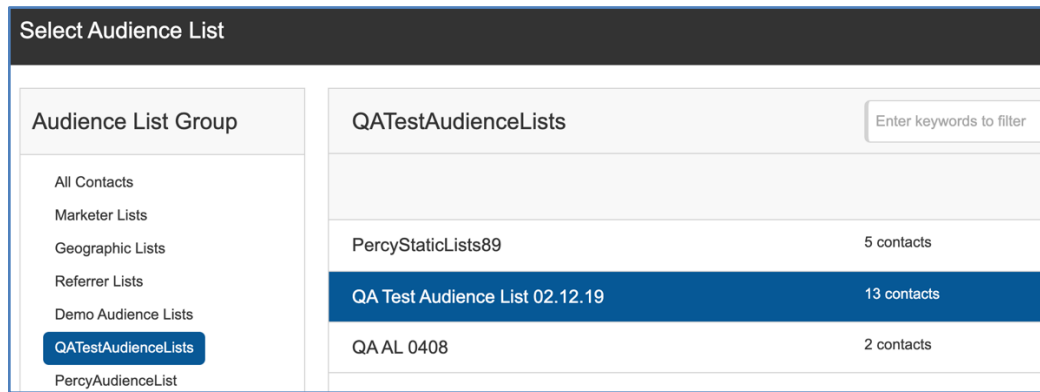
- Optionally, select the Reactions (Then) tab to drag and drop a reaction or reactions. (See [Flow Reactions](#).) To add another action, return to the Actions tab.

#### Action: [If] User in Audience List

- Note:** If you use this Action, it must be the first step in the flow.
- Under the Actions (If) tab, drag and drop **User in Audience List** to the panel on the right.
- In the Browse field, click the folder icon to select an Audience List.



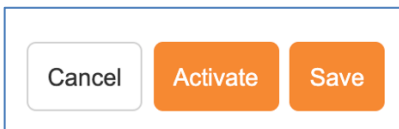
- In the panel on the left, under Audience List Group, select a group.
- In the panel on the right, select a list. Click **Select**.



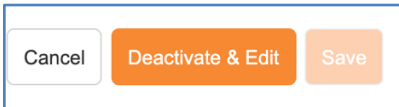
- Optionally, select the Reactions (Then) tab to drag and drop a reaction or reactions. (See [Flow Reactions](#).) To add another action, return to the Actions tab.

### Save, Activate, or Deactivate Flow Options

- When you have added all the actions and reactions you want for the flow and you're ready to make it active, click **Activate**.



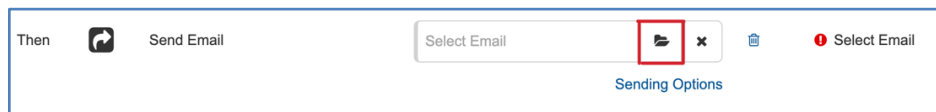
- Alternately, click **Save** to put it on "hold" until you're ready to activate it.
- Alternately, click **Cancel** to return to blank properties.
- Alternately, once you have Activated the flow, click **Deactivate & Edit**.



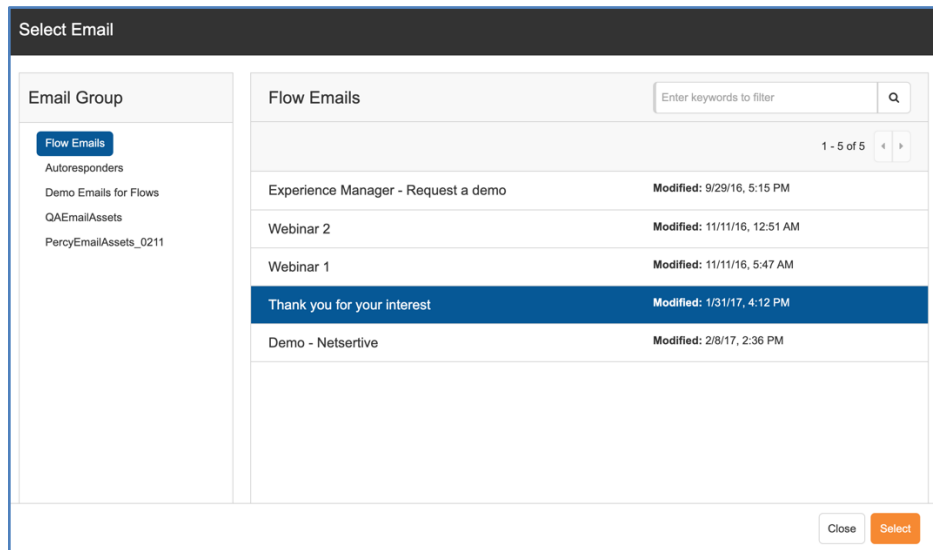
### Flow Reactions

#### Reaction: [Then] Send Email

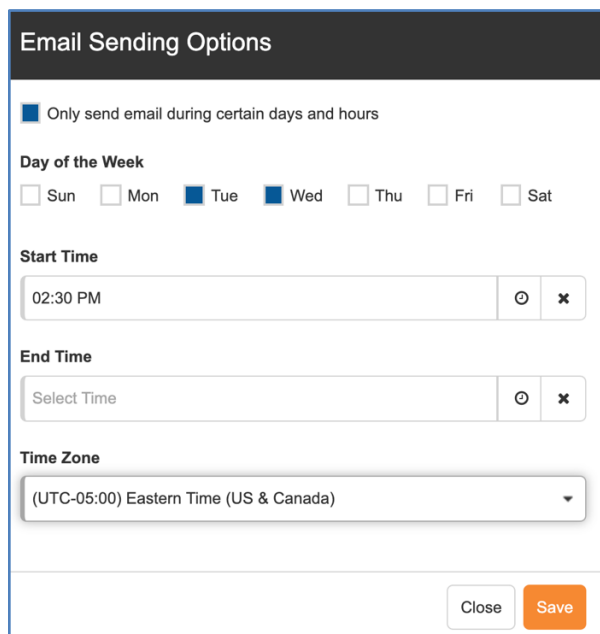
- Under the **Reactions (Then)** tab, drag and drop **Send Email** to the panel on the right.
  - In the Select Email field, click the folder icon to select an Email.



- On the Select Email page, select an Email Group and then an email from the panel on the right. Click **Select**.



- Optionally, click **Sending Options**.
  - In the Email Sending Options dialog, select your options.

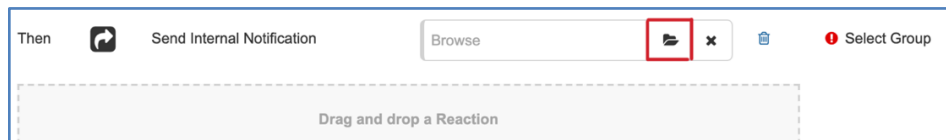


- Select or leave clear the check boxes beside:
  - Only send email during certain days and hours
  - If you choose “Only send email during certain days and hours”, select the check boxes beside your choices for **Day of the Week**.
  - In the Start Time field, click the clock icon to determine a start time

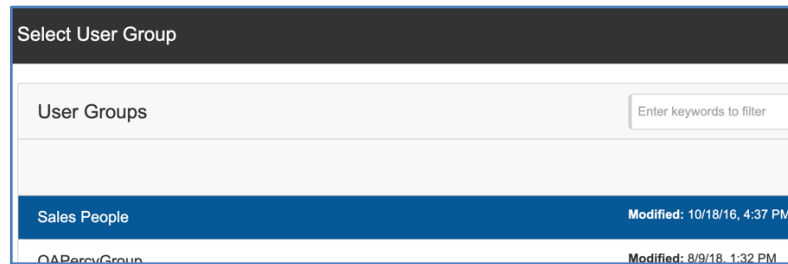
- In the End Time field, click the clock icon to determine an end time
  - In the Time Zone field, use the dropdown arrow to select a time zone.
- Click **Save** (or Close to return to the Edit Flow page).

**Reaction: [Then] Send Internal Notification**

- Under the **Reactions (Then)** tab, drag and drop **Send Internal Notification** to the panel on the right.
  - In the Browse field, click the folder icon to select a user group.

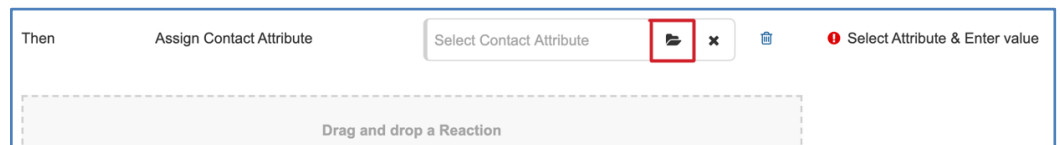


- On the Select User Group field, select a group. Click **Select**.



**Reaction: [Then] Assign Contact Attribute**

- Under the **Reactions (Then)** tab, drag and drop **Assign Contact Attribute** to the panel on the right.
  - In the Select Contact Attribute field, click the folder icon to select an Attribute.



- On the Select Attribute page, select a category from the panel on the left and then an Attribute from the panel on the right. Click **Select**.



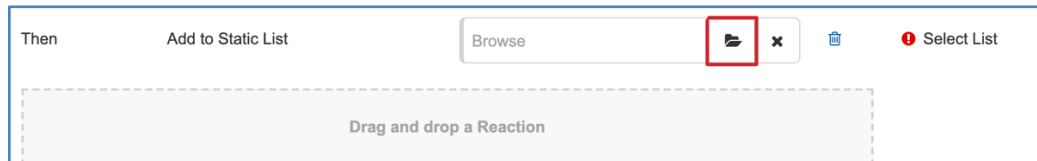
- In the Value field, enter a default attribute value.

#### Reaction: [Then] Assign Lead Points

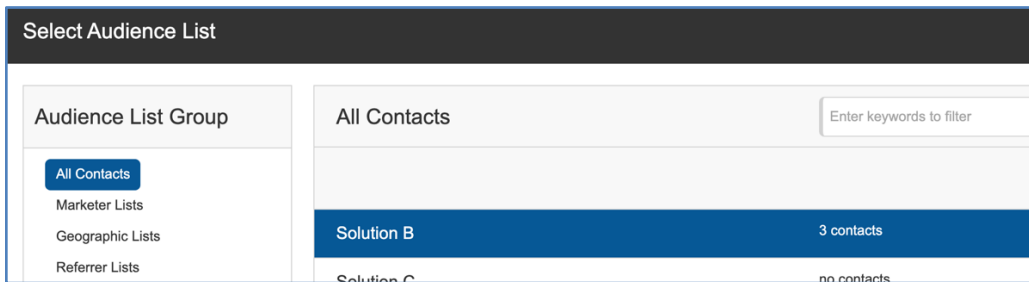
- Under the **Reactions (Then)** tab, drag and drop **Assign Lead Points** to the panel on the right.
- In the Lead Points field, add lead points.

#### Reaction: [Then] Add to Static List

- Under the **Reactions (Then)** tab, drag and drop **Add to Static List** to the panel on the right.
- In the Browse field, click the folder icon to select an Audience List.

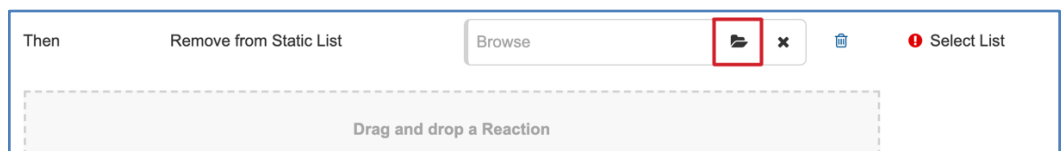


- On the Select Audience List page, in the panel on the left, select an Audience Group. Click Select.

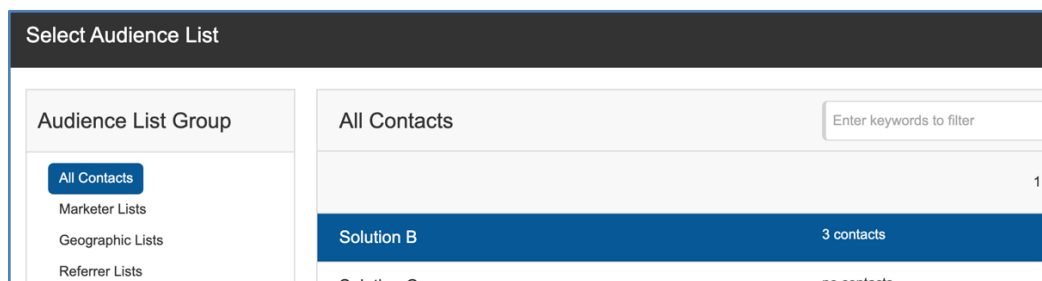


### Reaction: [Then] Remove from Static List

- Under the **Reactions (Then)** tab, drag and drop **Remove from Static List** to the panel on the right.
- In the Browse field, click the folder icon to select an Audience List.



- On the Select Audience List page, in the panel on the left, select an Audience Group.
- Click **Select**.

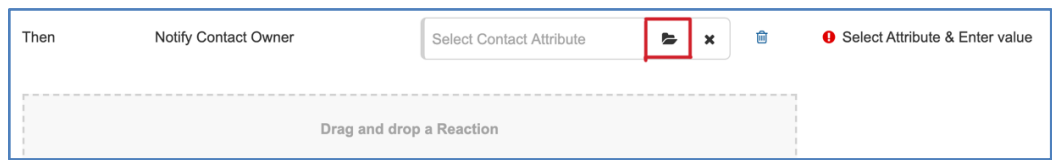


### Reaction: [Then] End Flow

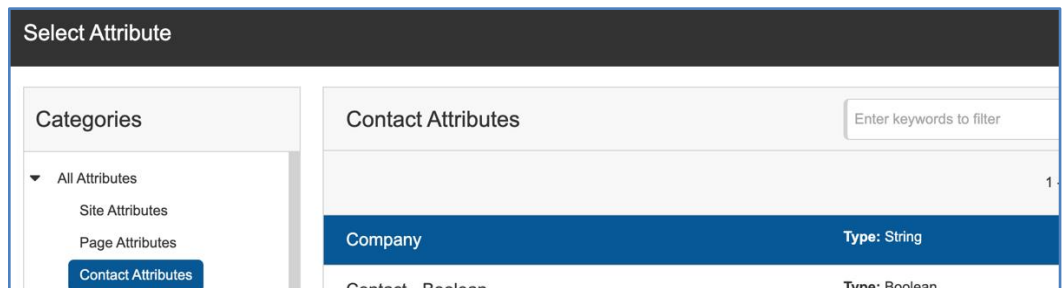
- Under the **Reactions (Then)** tab, drag and drop **End Flow** to the panel on the right.
- **Note:** End Flow should always be added as the last reaction.

### Reaction: [Then] Notify Contact Owner

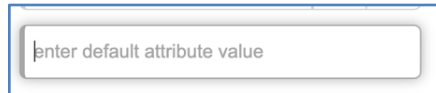
- Under the **Reactions (Then)** tab, drag and drop **Notify Contact Owner** to the panel on the right.



- In the Browse field, click the folder icon to select a Contact Attribute.
- On the Select Attribute page, in the panel on the left, select Contact Attributes.



- In the panel on the right, select an Attribute. Click **Select**.
- In the Value field, enter a default attribute value.



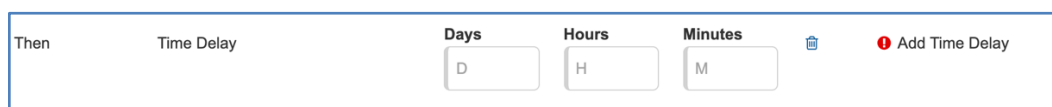
### Reaction: [Then] Trigger Conversion

- Under the **Reactions (Then)** tab, drag and drop **Trigger Conversion** to the panel on the right.

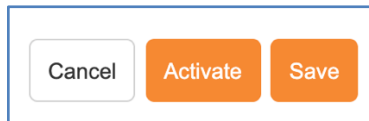
### Reaction: [Then] Time Delay

- **Note:** Time Delay should not be added as the last reaction.

- Under the **Reactions (Then)** tab, drag and drop **Time Delay** to the panel on the right.
- In the Days, Hours and Minutes field, enter the information.



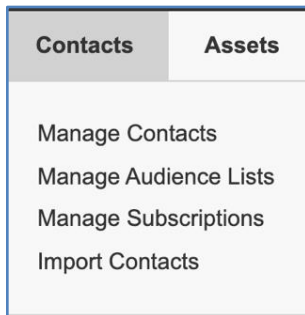
- Once you have entered your information on the Edit Flow page under the Reactions (Then) tab, click **Save**. If you are ready to activate the flow, click **Activate**. Alternately, click **Cancel**.



## Contacts

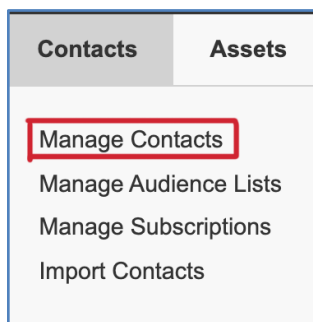
This is the place where you can organize and manage your contacts, audience lists, and subscriptions. You can also import your contacts here.

Under **Contacts**, there are four sections: Manage Contacts, Manage Audience Lists, Manage Subscriptions, and Import Contacts.

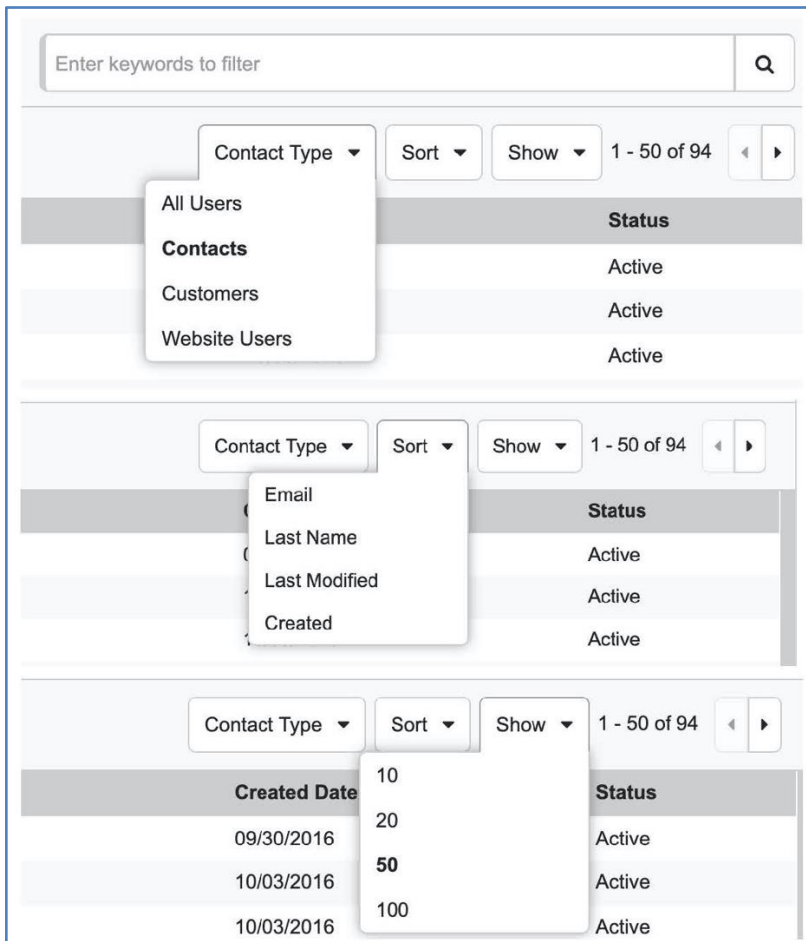


### Manage Contacts

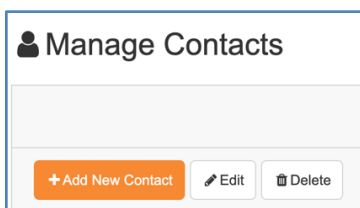
- Under Contacts, select **Manage Contacts**.



- On the Manage Contacts page, a search panel helps you to find your contacts by Keyword or by using the Contact Type, Sort and Show menus.

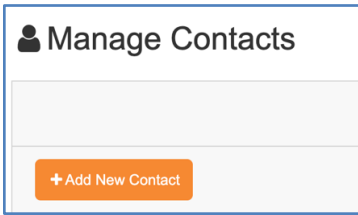


- You can manage your contacts using the icons at the top of the contact list.



### Add a new contact

- At the top of the Mange Contacts page, click Add New Contact.



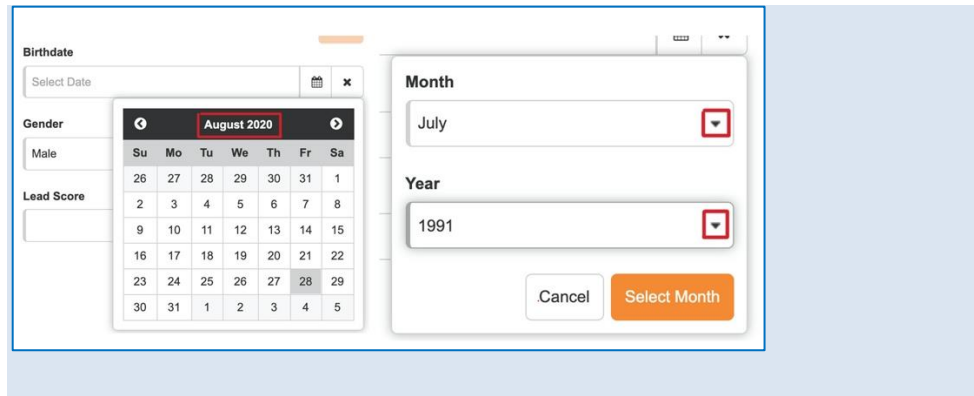
## General Details

### Properties

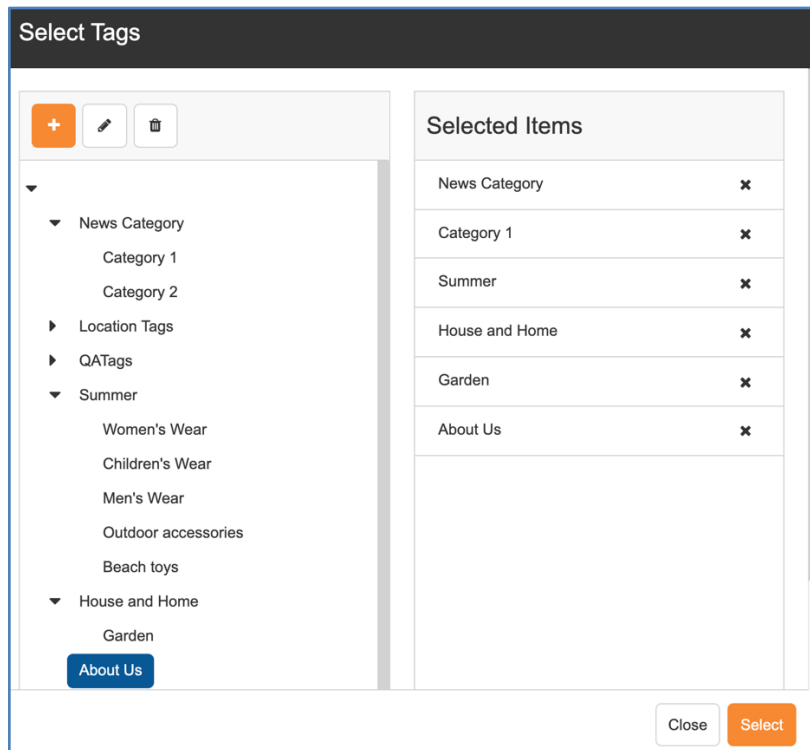
- On the New Contact page, under the General Details tab, in the Properties section, enter information into these fields:
- Email
- First Name
- Last Name

- Optionally, enter information into these fields:
  - Middle Name
  - Company Name
  - Home Phone
  - Mobile Phone
  - Other Phone
  - Birthdate

**Note:** An easy way to enter a birthdate using the calendar icon is to click on the month at the top of the calendar. Then use the dropdown arrows to determine month and year. Click **Select Month** to return to the calendar.



- Gender
- Lead Score
- Optionally, under Primary Site, in the Select Site field, click the folder icon.
- On the Select Site page, choose a site and click **Select**.
- Optionally under Tags, in the Select Tags field, click the folder icon.
- On the Select Tags page, in the panel on the left, choose from the Tags menu.
- In the panel on the right, under Selected Items, click **Select**.



## Attributes

Attributes allow you to have flexible categories of items. You can enter attributes from your database in order to personalize your email campaigns. There are several types of attributes – for example text, numbers, and URLs.

Attributes for Unbound Marketing are focused on contact properties. Only Unbound Marketing administrators have the permissions to add or edit Contact Attributes.

- Optionally, in the Attributes section, enter the information in fields. These are samples:
  - Company
  - Contact - Decimal
  - Contact – Integer
  - Customer - Date type
  - Customer – String
  - Downloaded Experience Manager File
  - Favorite Book (enum type)
  - Favorite Book (string type)
  - Lead Source
  - Office Phone
  - Title
  
- You can also use the dropdown arrows to enter personal questions, such as:
  - Hair Color
  - Phone
  - What car do you drive?
  - What industry are you in?
  - What is your timeframe?
  - Which product are you interested in?
  
- Optionally, at the bottom of the Attributes section, select the check box beside Contact – Boolean.

**Attributes**

Company: Vacation|supplies

Downloaded Experience Manager File: [Empty]

Phone: iPhone

Contact - Decimal: [Empty]

Favorite Book (enum type): The Great Gatsby

Title: [Empty]

Contact - Integer: [Empty]

Favorite Book (string type): [Empty]

What car do you drive: SUV

Customer - Date type: 3/25/2020

Hair Color: Brown

What industry are you in?: Sales

Customer - Enumerated: Swimming Gear

Lead Source: [Empty]

What is your timeframe?: 1 year or longer

Customer - String: [Empty]

Office Phone: [Empty]

Which product are you interested in?: Home

Contact - Boolean

- Optionally, at the bottom of the Attributes section, click **Add Attributes**.
  - On the Add Attributes page, under Categories, select an Attribute category.
  - In the panel to the right, in the Attributes list, select an attribute or attributes.
  - In the Selected Items panel on the far right, click **Select**.

**Add Attributes**

**Categories**

- All Attributes
  - Site Attributes
  - Page Attributes
  - Contact Attributes**
  - Customer Attributes
  - Order Attributes
  - Order Item
  - Product Info Tabs
  - Specification
  - Social
  - Site
  - Product Category
  - Request a Quote
  - Leads
  - Product Attributes

**Contact Attributes**

Enter keywords to filter

1 - 10 of 19

Lead Source	Type: String
Which product are you interested in?	Type: Enumerated
What is your timeframe?	Type: Enumerated
Downloaded Experience Manager File	Type: String
Company	Type: String
Title	Type: String
<b>What industry are you in?</b>	Type: Enumerated
Hair Color	Type: Enumerated
Office Phone	Type: String

**Selected Items** Reorder

- Which product are you interested in? ✕
- What is your timeframe? ✕
- What industry are you in? ✕

Close Select

## Audience Lists

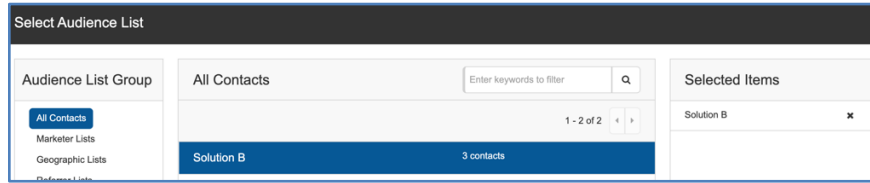
- In the Audience Lists section, in the Select Audience Lists field, click the folder icon.

**Audience Lists**

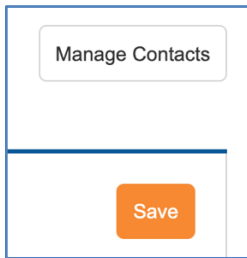
Select Lists

Select Audience Lists

- On the Select Audience List page, in the panel on the left, under Audience List Group, select a group.
- In the panel to the right, select an audience list or lists.



- In the panel on the far right, under Selected Items, click **Select**.
- When you have entered all your information into your New Contact page, at the top of the page, click Save.

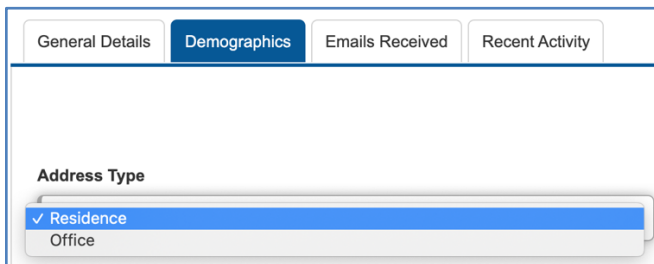


- Alternately, click Manage Contacts to return to the Manage Contacts page.
- When you save a New Contact page, next to General Details, these tabs you more options:
- Demographics
- Emails Received
- Recent Activity



## Demographics

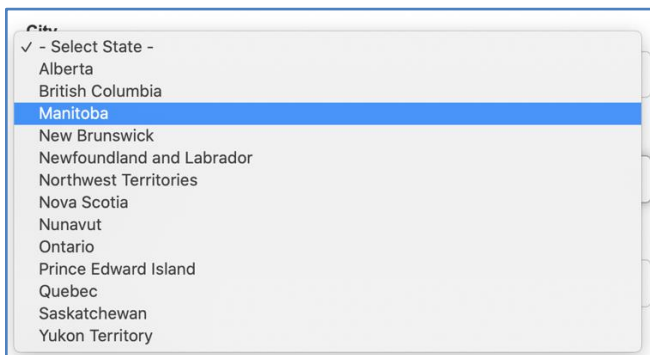
- Optionally, on the contact page, under the Demographics tab, in the Address Type field, use the dropdown arrow to make a selection.



- Optionally, in the Country field, use the dropdown arrow to make a selection.



- Optionally, enter information into the following fields:
- Address Line 1
- Address Line 2
- Address Line 3
- City
- Optionally, use the dropdown arrow to select State (or province or region or territory, depending on the country you have chosen).



- Optionally, enter information into the following fields:
- Postal Code
- Phone Number
- Optionally, in the Search for location field at the top of the page, start typing the address to have it revealed in the map.

- When you have entered all your information into Demographics, click Save.

### Emails Received and Recent Activity

- On the Contact page, click tabs **Emails Received** and **Recent Activity** for a list of each.

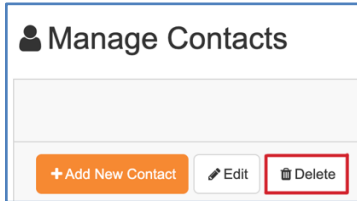
### Edit a contact

- On the Manage Contacts page, select a contact from the list.
- At the top of the page, click the **Edit** icon.

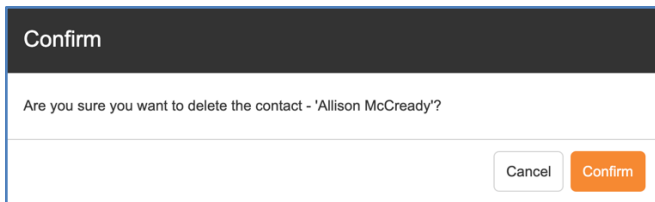
- On the contact page, make any revisions. Click **Save**.

### Delete a contact

- On the Manage Contacts page, select a contact from the list.
- At the top of the page, click the **Delete** icon.

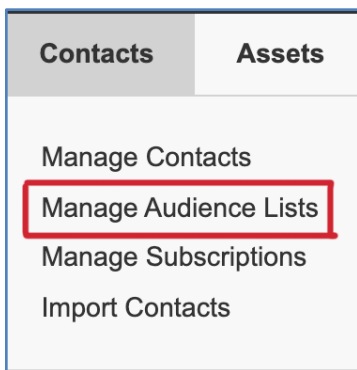


- In the Confirm dialog, click **Confirm**, or **Cancel** to return to the Manage Contacts page.



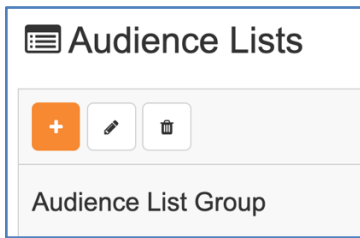
## Manage Audience Lists

- Under Contacts, select **Manage Audience Lists**.



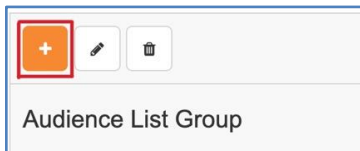
### Audience List Groups

- On the Audience Lists page, in the panel on the left, use the icons to manage groups under Audience List Group.



### Add an Audience list Group

- In the Audience List Group panel, click the Add icon.



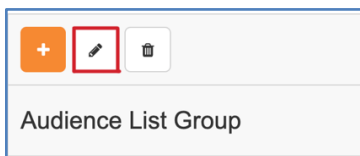
- In the Details dialog, enter a Name.

A screenshot of a "Details" dialog box. It has a dark header with the word "Details" in white. Below the header, there are two sections: "Name" with a text input field containing "New clients", and "Description" with a larger text area. At the bottom right, there are two buttons: "Close" and "Save".

- Optionally, enter a Description.
- Click **Save**.

### Edit an Audience list Group

- In the Audience List Group panel, click the **Edit** icon.

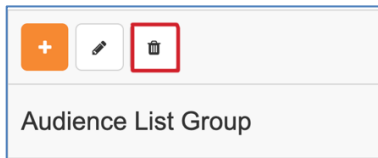


- In the Details dialog, make any revisions.

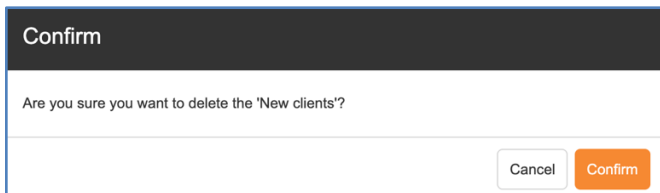
- Click **Save**.

### Delete an Audience Group

- In the Audience List Group panel, click the **Delete** icon.



- In the Confirm dialog, click **Confirm**, or **Cancel** to return to the Audience Lists page.

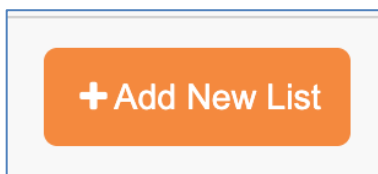


### Create Audience Lists

- On the Audience Lists page, in the panel on the left, select an Audience List Group.
- In the panel on the right, build your lists for that group.

### Add an Audience List

- In the Lists panel on the right, click **Add New List**.



### Details

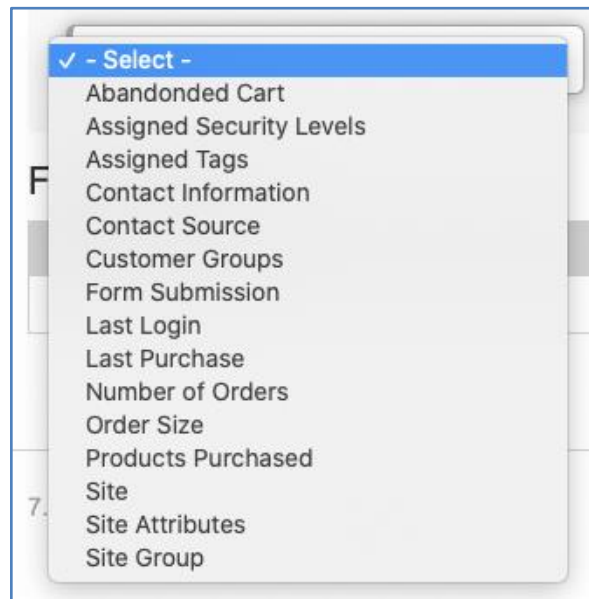
- On the Create Audience List page, under Details, in the Name field, enter a name.
- Optionally, in the Description field, enter a description.
- Optionally, select the check box beside **Save this list as Global** (allows all sites to send emails to this list).
- In the list of options on the right, select one:
  - Dynamic List  
(This is a smart list that will update itself based on the filters selected at the time of the email send.)
  - Static List

(This list will consist of contacts which meet the filter criteria at the time the list is saved.)

- Session-based List  
(Use the Session-based List to create a real-time filter for targeted content. Choose a location or a referring source, and when a visitor comes from that location or source, they will see the targeted content created.)

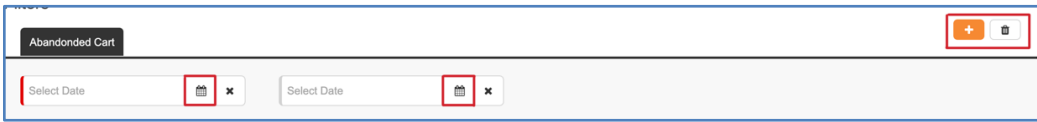
## Filters

- Under Filters, use the dropdown arrow to select from these options:
  - Abandoned Cart
  - Assigned Security Levels
  - Assigned Tags
  - Contact Information
  - Contact Source
  - Customer Groups
  - Form Submission
  - Last Login
  - Last Purchase
  - Number of Orders
  - Order Size
  - Products Purchased
  - Site
  - Site Attributes
  - Site Group

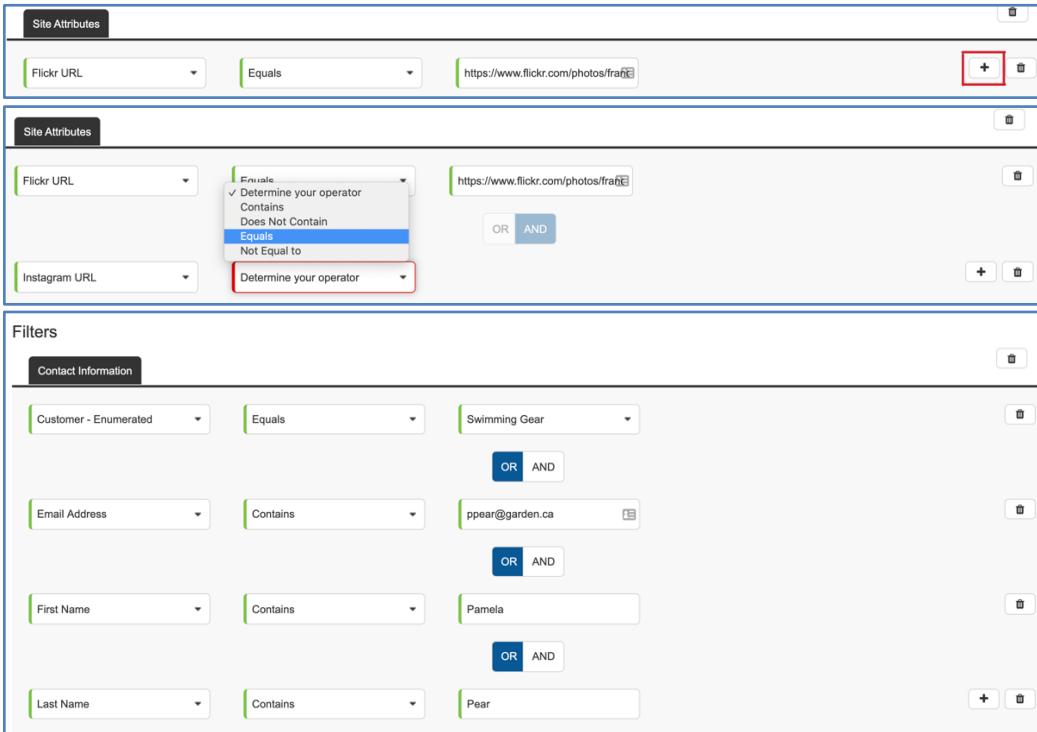


- With each filter you select, there are further steps to take.

- If, for example, you select Abandoned Cart, there will be two fields to complete.



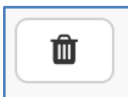
- If you select certain others, such as Site Attributes or Contact Information, click the small plus sign to keep adding fields.



- To select another filter, click the **Add** icon.



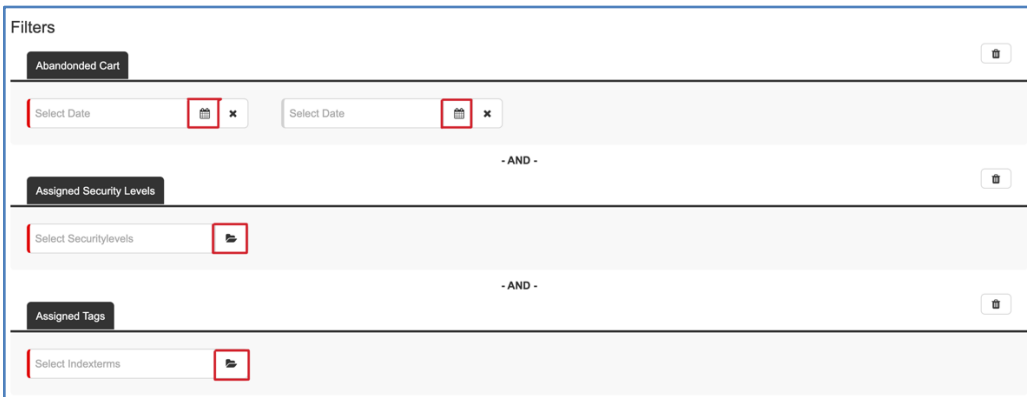
- Similarly, click the delete icon to remove it.



- Each time you click the Add icon, the select field with a dropdown arrow appears so you can select another.

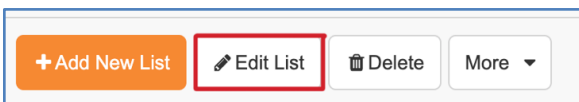


- The new action is displayed with its relevant fields for further action.



### Edit an Audience List

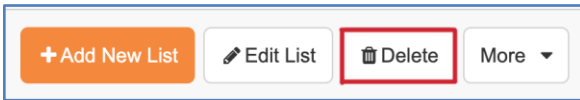
- On the Audience Lists page, in the panel on the left, select an Audience List Group.
- In the panel on the right, select a list.
- At the top of the list panel, click the **Edit List** icon.



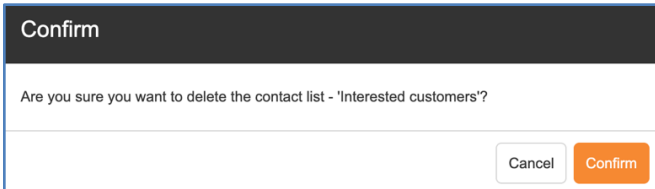
- On the Edit Audience List page, make any revisions.
- Click **Save**.

### Delete an Audience List

- On the Audience Lists page, in the panel on the left, select an Audience List Group.
- In the panel on the right, select a list.
- At the top of the list panel, click the **Delete** icon.

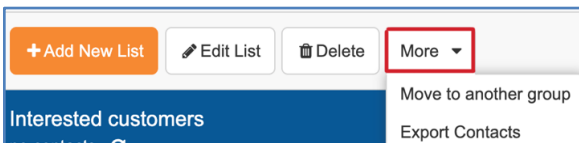


- In the Confirm dialog, click Confirm, or Cancel to return to the Audience Lists page.



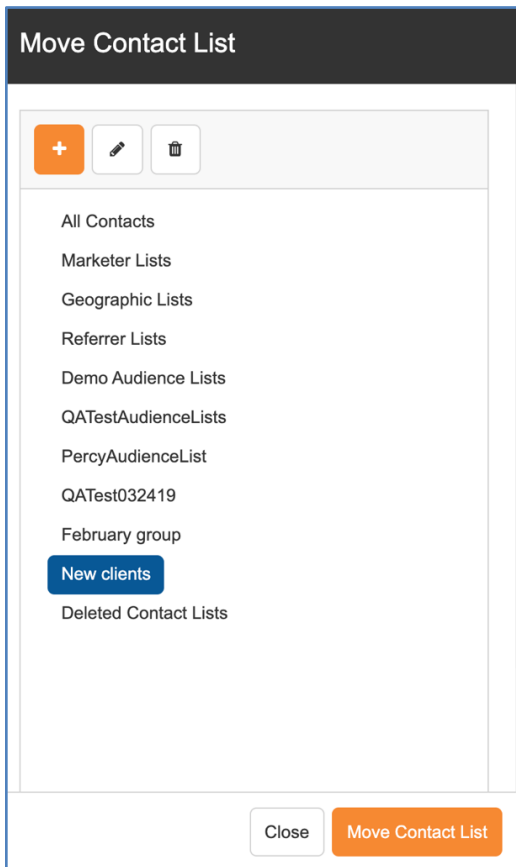
### Other options

- On the Audience Lists page, in the panel on the left, select an Audience List Group.
- In the panel on the right, select a list.
- At the top of the list panel, click the **More** icon.



**Note:** This “More” option is specifically for the Audience List Type. For Static Lists, you will also see “View Contacts” as an option. For Session Lists, you will only see the option to “Move to another group”. (See [Create Audience Lists.](#))

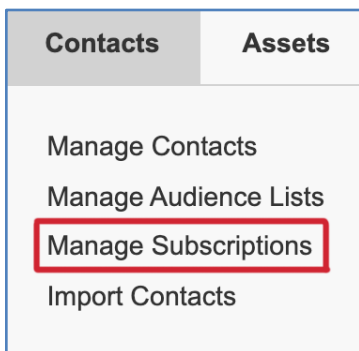
- From the dropdown menu, select **Move to another group**, or **Export Contacts**.
- If you choose Move to another group, in the Move Contact List dialog, select a list.



- Click **Move Contact List**.
- If you choose Export Contacts, select a file from your computer or device.

### Manage Subscriptions

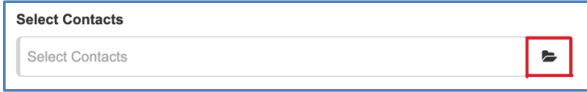
- Under Contacts, select **Manage Subscriptions**.



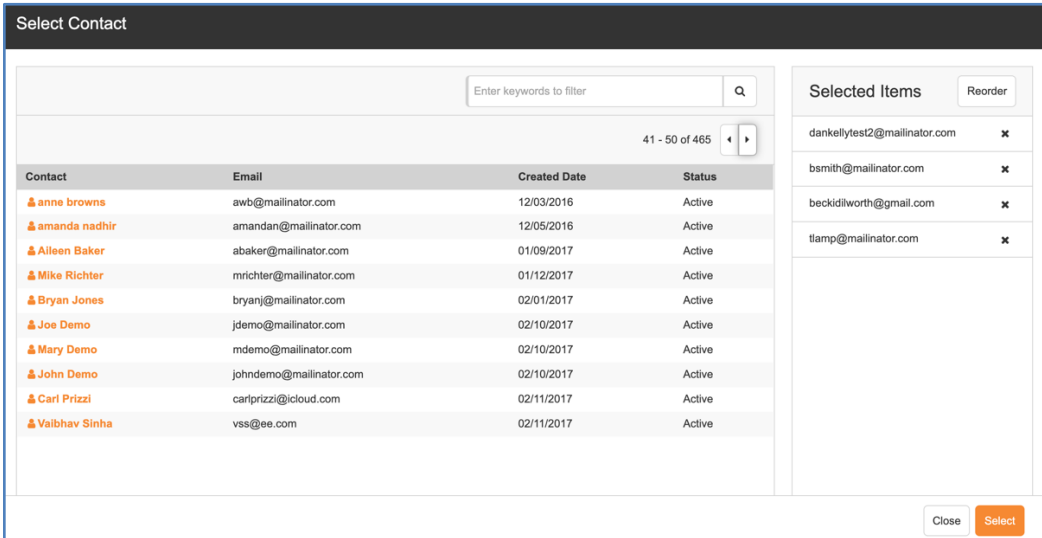
You can select contacts and/or upload a CSV file with email addresses.

## Select Contacts

- On the Manage Subscription page, in the Select Contacts field, click the folder icon.



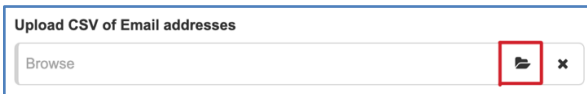
- Optionally, on the Select Contact page, use the filter search bar to find the contacts you want.
- Select a contact or contacts.



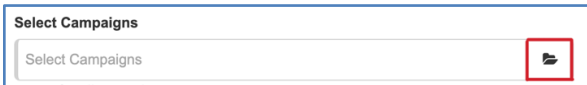
- In the Selected Items panel on the left, click **Select**.

## Upload CSV of Email Addresses

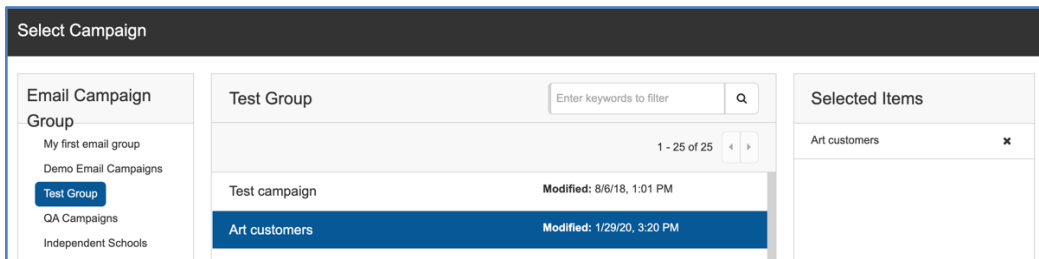
- In the Browse field under Upload CSV of Email addresses, click the folder icon.



- Select a CSV file from your computer or device.
- In the Select Campaigns field, click the folder icon.



- On the Select Campaign page, in the panel on the left, select an Email Campaign Group.
- In the panel on the right, select a group or groups.

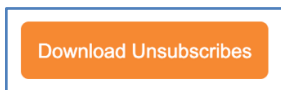


- In the panel on the far right, under Selected Items, click **Select**.
- At the bottom of the page, click Unsubscribe or Resubscribe.



### Unsubscribed email addresses

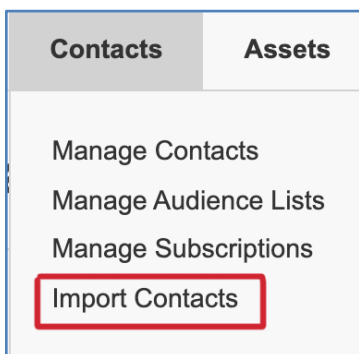
- If you choose Unsubscribe, you can save the list to your files.
- On the right side of the page, in the Select a Campaign field, click the folder icon.
- On the Select Campaign page, in the panel on the left, select an Email Campaign Group.
- In the panel on the right, select a group or groups.
- In the panel on the far right, under Selected Items, click **Select**.
- At the bottom of the page, click **Download Unsubscribes**.



- Download to your computer or device.
- Import Contacts

### Import Contacts

- Under Contacts, select **Import Contacts**.

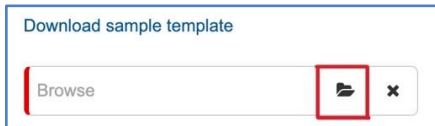


## Select Data Source

- On the Contact Import page, under Select Data Source, select one of these options:
  - Upload CSV File
  - Salesforce Contacts
  - Salesforce Leads

## Upload CSV file

- Optionally, click **Download sample template** to save one to your files.
- In the Browse field, click the folder icon to select one from your files.



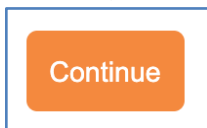
- Under Options, select or clear the check boxes beside:
  - Overwrite existing contact properties (based on email address)
  - Overwrite existing admin user or website user or commerce customer properties (based on email address).
- At the top of the page, click **Continue**.

## Salesforce Contacts

- If you select Salesforce Contacts as your Data Source:
- Under Options, select or clear the check boxes beside:
  - Overwrite existing contact properties (based on email address)
  - Overwrite existing admin user or website user or commerce customer properties (based on email address).
- At the top of the page, click **Continue**.

## Salesforce Leads

- If you select Salesforce Leads as your Data Source:
- Under Options, select or clear the check boxes beside:
  - Overwrite existing contact properties (based on email address)
  - Overwrite existing admin user or website user or commerce customer properties (based on email address).
- At the top of the page, click **Continue**.



## Map Fields

- On the Contact Import page, under Map Fields, use the dropdown arrows to choose or change your field.

The screenshot shows the 'Map Fields' step in the Contact Import process. A dropdown menu is open, displaying a list of fields: Email, OtherPhone, ExpiryDate, EmailNotification, BirthDate, datetime\_test, CompanyName, IncludeChildrenSites, FirstName, MobilePhone, HomePhone, LeadScore, TimeZone, LastName, underscore\_test, Gender, and MiddleName. The main interface shows a table for mapping Marketier Contact Properties to Your Fields. The 'Required' column shows '1 of 0'.

Marketier Contact Property	Your Fields	Required
Email	Email	
FirstName	FirstName	
LastName	LastName	
MiddleName	MiddleName	
CompanyName	CompanyName	
Gender	Gender	
HomePhone	HomePhone	
MobilePhone	MobilePhone	
OtherPhone	OtherPhone	

- Click **Continue**.

## Preview

- On the Contact Import page, under Preview, you can view Total Records, Valid Emails, Records with Errors and Duplicate Emails.
- You can also view Contacts to be Imported.
- Click **Continue**.

## Define Audience Lists and View Results

- On the Contact Import page, under Define Audience Lists, you can view New Contacts, Existing Contacts, Updated Contacts, and Contacts added to List.

- You can also Import More Contacts.



- At the top of the page, click **Done**.

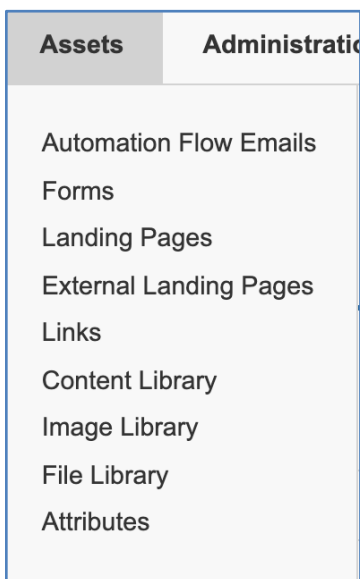


## Assets

The Assets section is a kind of central toolshed of your marketing implements and repositories: the things that make your marketing efforts work – the resources behind the scenes that allow it all to happen with ease.

In Assets, you have many choices. They are:

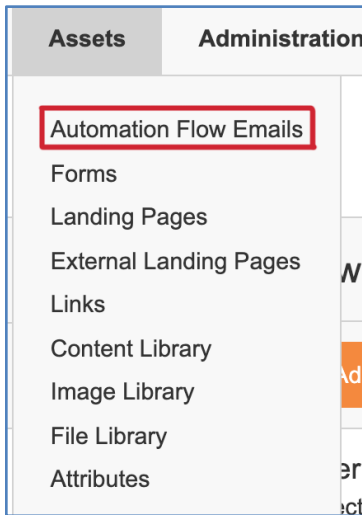
- Automation Flow Emails
- Forms
- Landing Pages
- External Landing Pages
- Links
- Content Library
- Image Library
- File Library
- Attributes



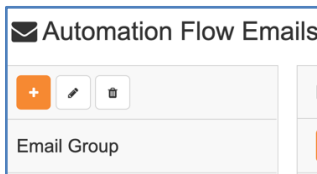
## Automation Flow Emails

Bridgeline Unbound Marketing helps you to create personalized, targeted emails that happen automatically at points you determine – for example, when a potential customer requests information, makes a comment, shows an active interest, or clicks on a link.

- Under Assets, click **Automation Flow Emails**.

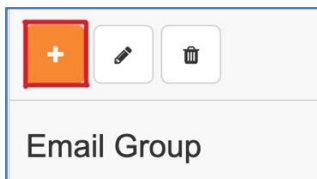


- On the Automation Flow Emails page, in the panel on the left, use the icons at the top to create, edit or delete your Email Groups.



### Add an Email Group

- In the Email Group panel on the left, click the Add icon.

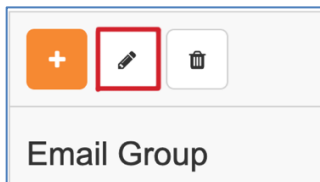


- In the Details dialog, in the Name field, enter a name.

- Optionally, in the Description field, enter a description.
- Click **Save**, or **Close** to return to the Manage Automation Flow Emails page.

### Edit an Email Group

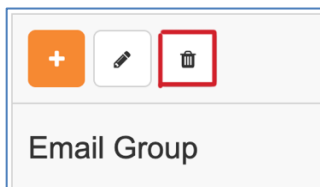
- In the Email Group panel on the left, click the Edit icon.



- In the Details dialog, make any revision.

### Delete an Email Group

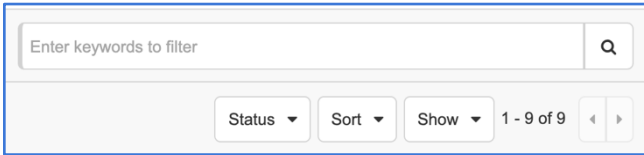
- In the Email Group panel on the left, click the Delete icon.



- In the Confirm dialog, click **Confirm**, or **Cancel** to return to the Manage Email Campaigns page.

## Add a new Email

On the Automation Flow Emails page, in the section on the right for emails, a search panel helps you to find your emails by Keyword or by using the Status, Sort and Show menus.

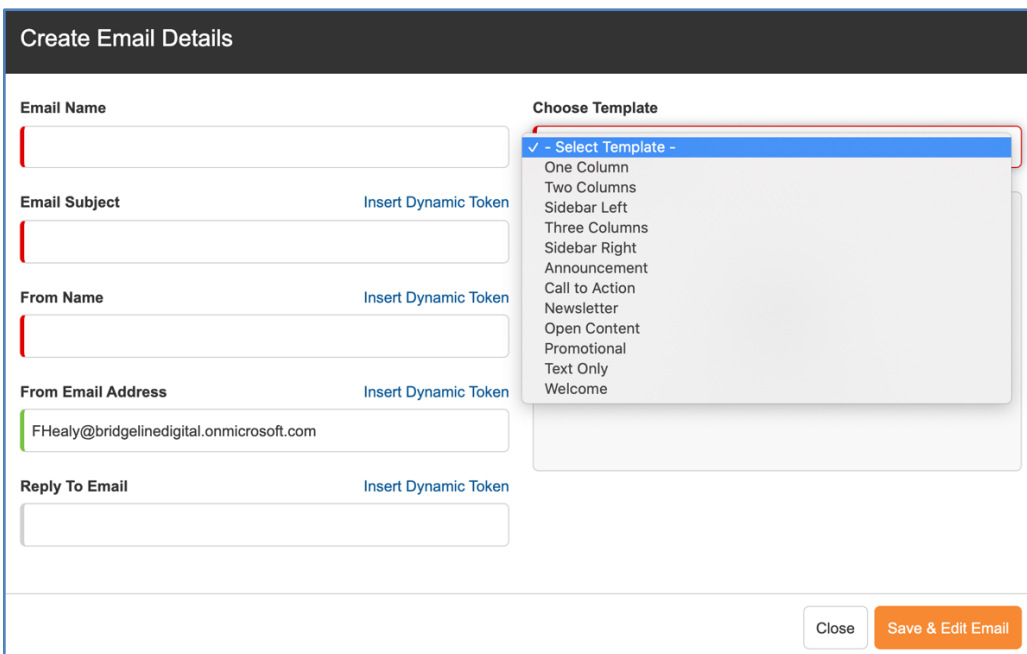


A search and filter panel with a text input field labeled "Enter keywords to filter" and a search icon. Below it are three dropdown menus labeled "Status", "Sort", and "Show", followed by a pagination indicator "1 - 9 of 9" and navigation arrows.

- In the Email Group panel, select a group.
- In the panel on the right, click **Add New Email**.





- On the Create Email Details page, in the Email Name field, enter a name.



The "Create Email Details" form includes fields for Email Name, Email Subject, From Name, From Email Address, and Reply To Email. Each field has an "Insert Dynamic Token" link. A "Choose Template" dropdown menu is open, showing options like One Column, Two Columns, Sidebar Left, Three Columns, Sidebar Right, Announcement, Call to Action, Newsletter, Open Content, Promotional, Text Only, and Welcome. The form also has "Close" and "Save & Edit Email" buttons at the bottom right.


- Enter information in the Email Subject and From Name fields.
- In the From Email Address field, use the address that has been populated, or enter another one.
- In the Reply to Email, enter an email address.
- In the Choose Template field, use the dropdown arrow to make a selection.
- Click **Save & Edit Email**.
- In the Email Editor, depending on the [template](#) you have chosen, add your [content](#).

Welcome to **Sunshine** Garden Supplies!

**We have everything you need for a perfect garden this summer**

Flower seeds, flower seedlings, fertilizer and gardening books full of tips and tricks [more](#)



**If you're looking for colour in your garden, this is the place to find it.**

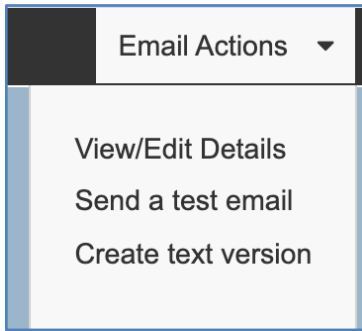
We supply seeds from all over the world, and the advice about how, where, and when to grow them [more](#)

- At the top of the Email Editor, click **Save**.

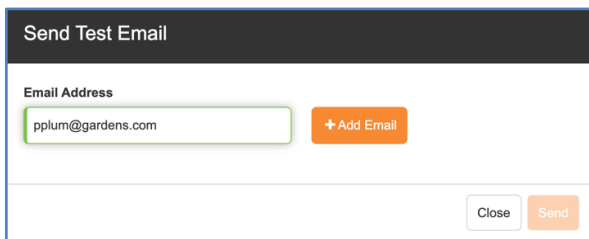


### Email Actions

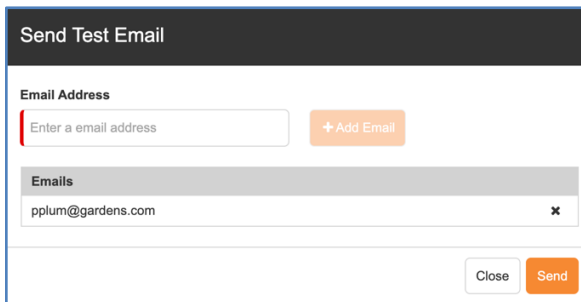
- To take actions with your email, at the top of the Email Editor, use the dropdown arrow beside Email Actions. Select one of the following:
  - View/Edit Details
  - Send a test email
  - Create text version



- If you select View/Edit Details, the Create Email Details will display so you can make any revisions.
- If you select Send a test email, in the Send Test Email dialog, enter an email address.



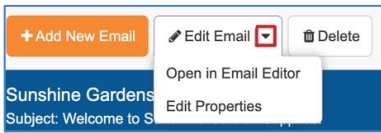
- Click Add Email.
- Optionally, add another email address.



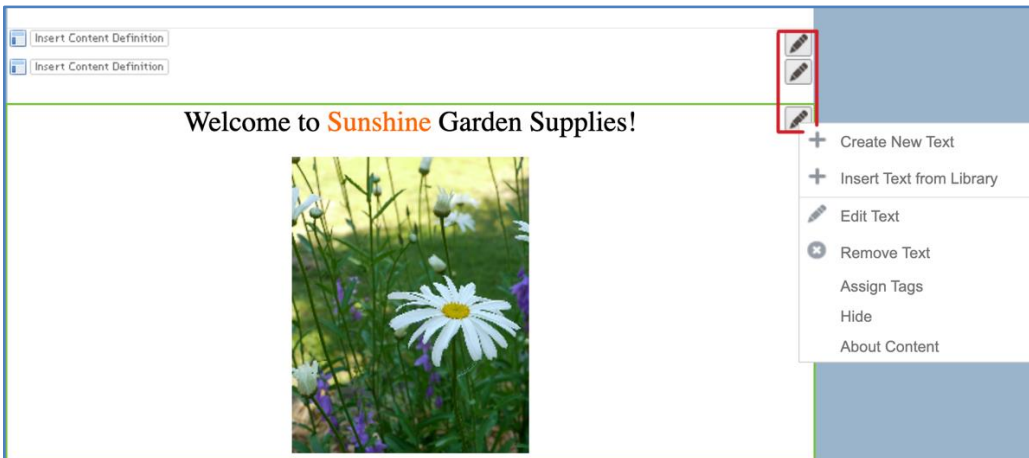
- Click Send.

### Edit an Email

- In the Email Group panel, select a group.
- In the panel on the right, select an Email.
- Click Edit Email and choose one of two options: **Open in Email Editor** or **Edit Properties**.



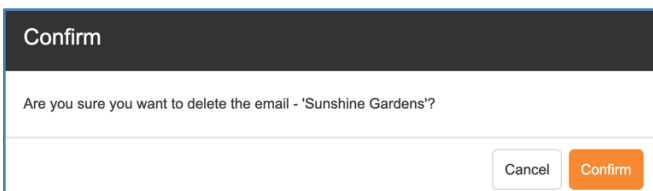
- If you choose Edit Properties, on the Create Email Details page, make any revisions. Click Save.
- If you choose Open in Email Editor, on the Email Editor page, click the edit icons to make any revisions.



- At the top of the Email Editor page, click **Save**.

### Delete an Email

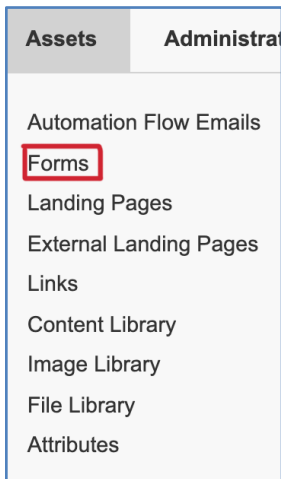
- In the Email Group panel, select a group.
- In the panel on the right, select an email.
- Click **Delete**.
- In the Confirm dialog, click **Confirm**, or Cancel to return to the Automation Flow Emails page.



## Forms

Forms allow your users to interact with your site, but they need to be simple to manage – and to make. With Bridgeline Unbound Marketing, you can build, revise, manage and maintain forms with a simple drag-and-drop process.

- Under Assets, select **Forms**.



### Add a Forms category

- In the Form panel on the left, click the **Add** icon.



- In the Details dialog, in the Name field, enter a name.

A screenshot of a 'Details' dialog box. It has a dark header with the title 'Details'. Below the header, there are two input fields: 'Name' and 'Description'. The 'Name' field is a text input box with a red border, and the 'Description' field is a larger text area. At the bottom right of the dialog, there are two buttons: 'Close' and 'Save'.

- Optionally, in the Description field, enter a description.
- Click **Save**, or **Close** to return to the Forms page.

### Edit a Forms category

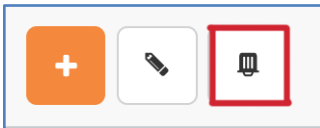
- In the Forms panel on the left, click the **Edit** icon.



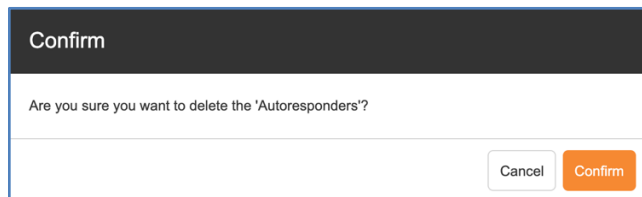
- In the Details dialog, make any revisions.

### Delete a Forms category

- In the Forms panel on the left, click the **Delete** icon.

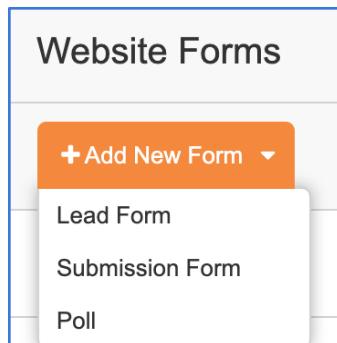


- In the Confirm dialog, click **Confirm**, or **Cancel** to return to the Forms page.



### Add a new form

- In the panel on the left, select a category.
- In the panel on the right, click Add New Form. Use the arrow for a dropdown menu of choices:
  - Lead Form
  - Submission Form
  - Poll



## Lead form

- On the Form Details page for a Lead form, there are four panels. Each has a different function.

The screenshot shows the 'Form Details' interface for a lead form. It is organized into four main sections: **Details**, **Available Fields**, **Form Definition**, and **Properties**. The **Details** section contains input fields for Title, Description, CSS Class, a checkbox for 'Require CAPTCHA to submit form', Submit Button Text, and Submit Button Aria Label. The **Available Fields** section has two tabs: 'Generic Fields' and 'Contact Properties'. Under 'Generic Fields', there are eight field types: CheckBox List, Date Picker, Dropdown List, Email Opt-in, File Upload, RadioButton List, Text Area, and Text Box. The **Form Definition** section shows a list of fields, with 'Email' selected. The **Properties** section includes fields for Title, Label, Placeholder, and Row CSS Class. At the bottom right, there are 'Close' and 'Save' buttons.

### Details

- In the Details panel, in the Title field, enter a title.
- Optionally, enter:
  - Description
  - CSS Class
  - Submit Button Text
  - Submit Button Aria Label (for users using screenreaders)
  - Thank you Redirect URL
  - Thank You Message
- Optionally, select the check boxes beside:
  - Require CAPTCHA to submit form
  - Send an email for each Submission

### Available Fields

In the Available Fields panel, there are two tabs: Generic Fields and Contact Properties.

### Generic Fields

- Under the Generic Fields tab, select the fields you would like to have on your form and drag them to the Form Definition panel to the right.
- These are the Generic Fields:

- CheckBox List
- Date Picker
- Dropdown List
- Email Opt-in
- File Upload
- RadioButton List
- TextArea
- TextBox

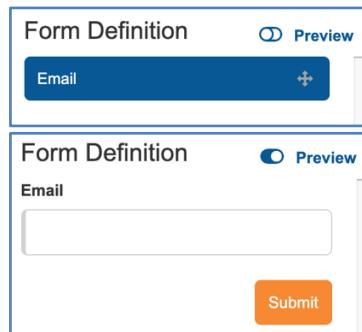
### Contact Properties

- Under the Contact Properties tab, select the fields you would like to have on your form and drag them to the Form Definition panel to the right.
- These are the Contact Properties:
  - Company
  - Contact-Boolean
  - Contact – Decimal
  - Contact – Integer
  - Customer – Date Type
  - Customer – Enumerated
  - Customer – String
  - Downloaded Experience Manager File
  - Favorite Book (eum type)
  - Favorite Book (string type)
  - First Name
  - Gender
  - Hair Color
  - Home Phone
  - Last Name
  - Lead Source
  - Mobile Phone
  - Office Phone
  - Other Phone
  - Phone
  - Title
  - What car do you drive?
  - What industry are you in?
  - Which product are you interested in?
- Optionally, at the bottom of the Available Fields panel, click **Manage Contact Attributes**.

- On the Manage Attributes page, select a category.
- In the list of attributes for that category, add a new attribute.
- On the Attribute Details page, enter the information.
- Click **Save**.

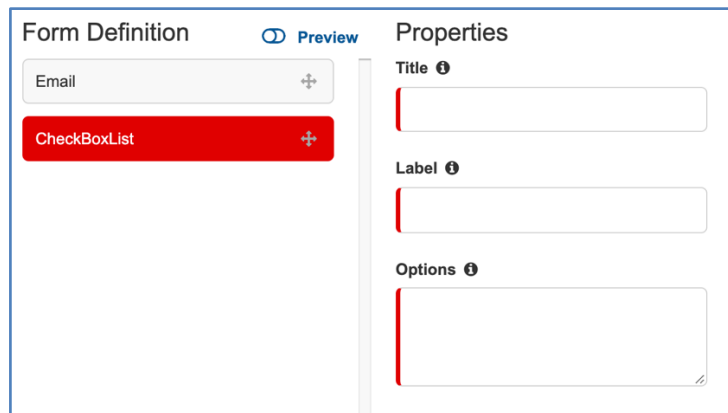
### Form Definition

- At the top of the Form Definition, where you have dragged your Available Fields, there is a toggle button beside Preview. Use this to see how your fields will appear on your form.

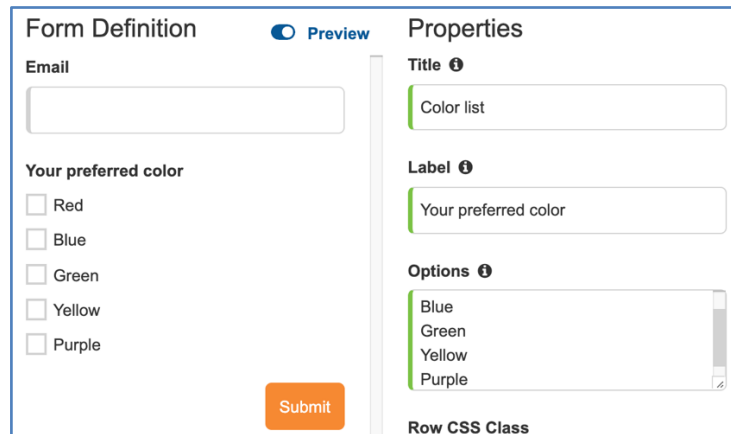


### Properties

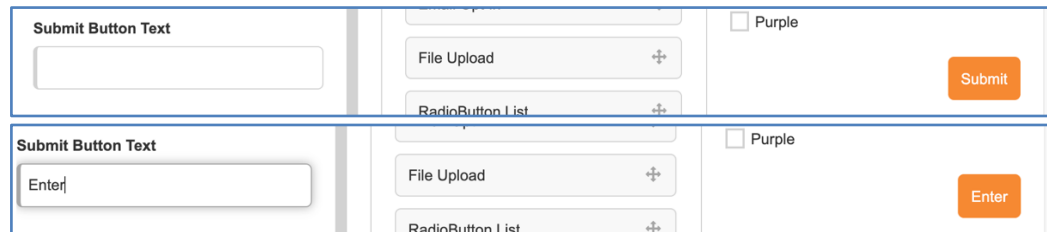
- In the Properties panel on the far right, enter the properties for each field in the Form Definition panel.



- Toggle the Preview button to see how each field will appear.

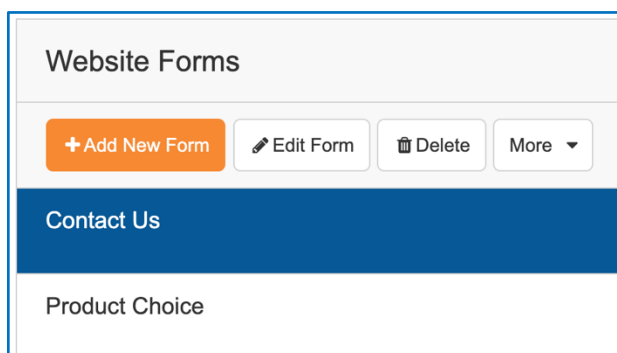


- To change the name of the “Submit” button in Form Definition, in the Details Panel, enter **Submit Button Text**.



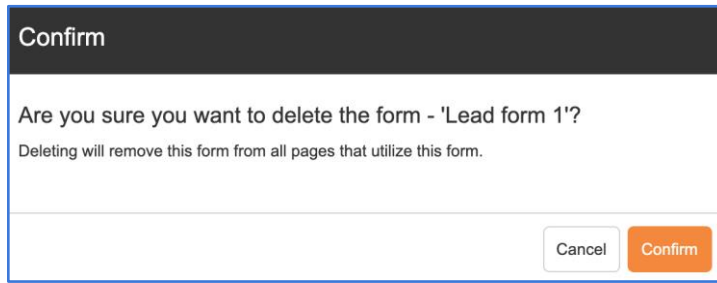
## Form Options

Using the icons at the top of the Forms list panel on the right, there are several things you can do depending on the type of form you have created.



- On the Forms page, in the panel on the left, choose a category.
- In the panel on the right, select a form and use the icons to **Edit Form** or **Delete**.
  - If you choose to edit the form, on the Form Details page, make your revisions.
  - Click **Save**.

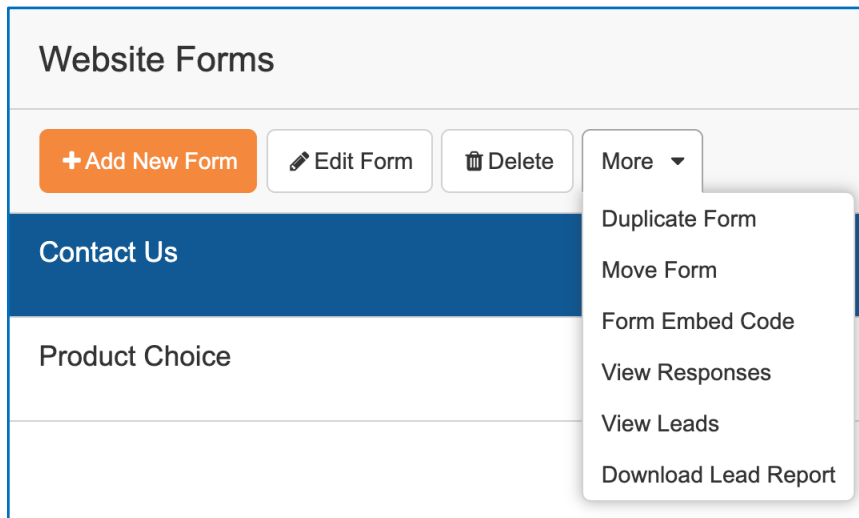
- If you choose to delete a form, in the Confirm dialog, click **Confirm**.



A screenshot of a 'Confirm' dialog box. The title bar is dark grey with the word 'Confirm' in white. The main content area is white and contains the text: 'Are you sure you want to delete the form - 'Lead form 1'? Deleting will remove this form from all pages that utilize this form.' At the bottom right, there are two buttons: a white 'Cancel' button and an orange 'Confirm' button.

### More form options

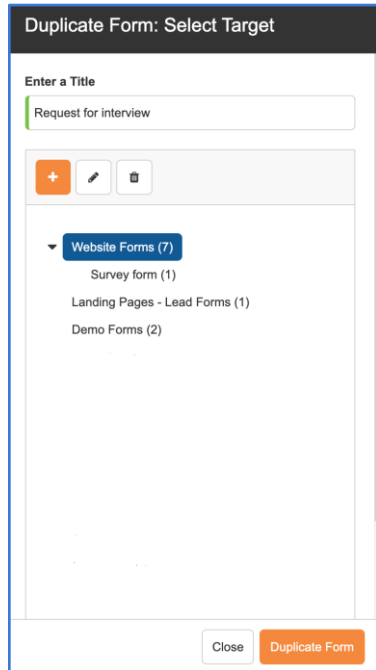
- For more options, use the More dropdown arrow to choose one of these actions from the menu:
  - Duplicate Form
  - Move Form
  - Form Embed Code
  - View Responses
  - View Leads
  - Download Lead Report



A screenshot of the 'Website Forms' interface. At the top, there's a header 'Website Forms'. Below it, there are four buttons: '+ Add New Form' (orange), 'Edit Form' (white with a pencil icon), 'Delete' (white with a trash icon), and 'More' (white with a dropdown arrow). The 'More' dropdown menu is open, showing a list of options: 'Duplicate Form', 'Move Form', 'Form Embed Code', 'View Responses', 'View Leads', and 'Download Lead Report'. Below the buttons, there's a table with two rows: 'Contact Us' and 'Product Choice'.

### Duplicate Form

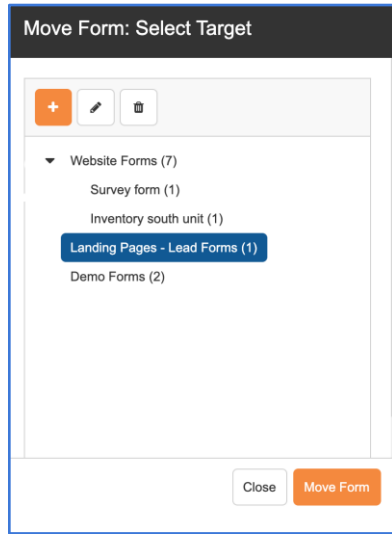
- Optionally, using the More dropdown menu, select **Duplicate Form**.
- In the Duplicate Form: Select Target dialog, enter a title.



- In the list of targets, choose a category.
  - Alternately, use the icons to add a new category or edit or delete a category.
- When you have made your revisions, click **Duplicate Form**.

#### Move Form

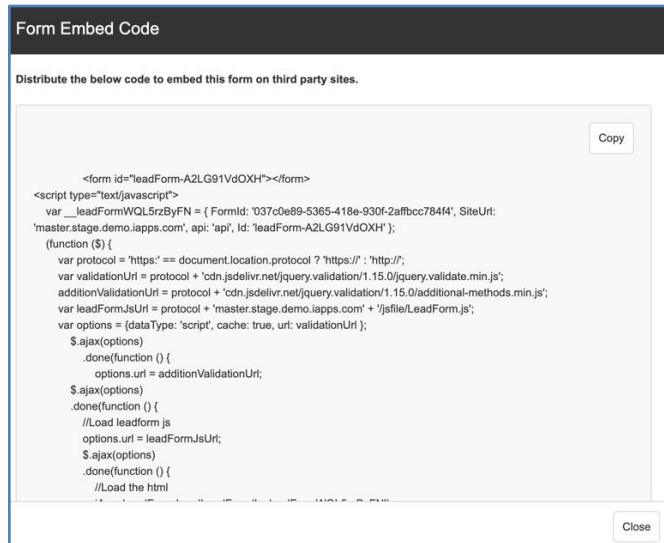
- Optionally, using the More dropdown menu, select **Move Form**.
- In the Move Form: Select Target dialog, select a category.



- Alternately, use the icons to add a new category or edit or delete a category.
- When you have made your selection, click **Move Form**.

### Form Embed Code

- Optionally, using the More dropdown menu, select Form Embed Code.
- On the Form Embed Code page, copy the code to embed it on third party sites.



### View Responses

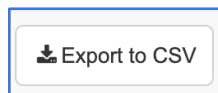
- Optionally, using the More dropdown menu, select **View Responses**.
- On the Responses page, select one of the responses.

- Click **View Details**.

The screenshot shows a web interface for 'Responses - Percy'. At the top, there is a header with a calendar icon and the text 'Responses - Percy'. Below the header, there are two buttons: 'Delete' and 'View Details'. The 'View Details' button is highlighted with a red border. Below the buttons is a section titled 'Form Response Details' with a dark header. The details are as follows:

<b>Response Date</b>	3/25/19, 3:01 PM
<b>Response By</b>	Test0325, Percy
<b>IP Address</b>	108.183.241.113
<b>Email</b>	percytest@mailinator.com
<b>Enter Text</b>	Percy form submission
<b>Gender</b>	Male
<b>Marital Status</b>	Married
<b>Housing</b>	Rent
<b>First Name</b>	Percy
<b>Last Name</b>	

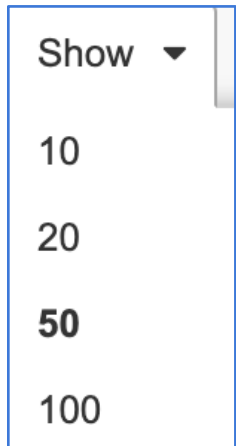
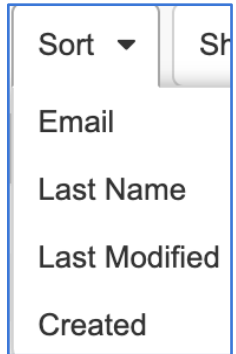
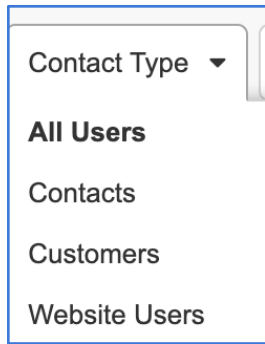
- Optionally, Click **Export to CSV** and choose the location on your computer or device.



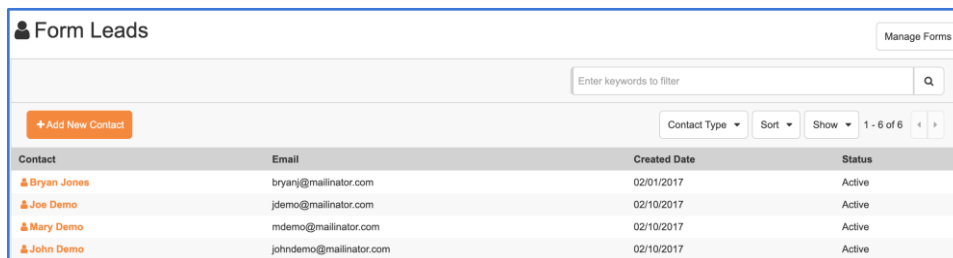
### View Leads

- Optionally, using the More dropdown menu, select **View Leads**.
- Optionally, filter the leads using the Contact Type, Sort, and Show menus.

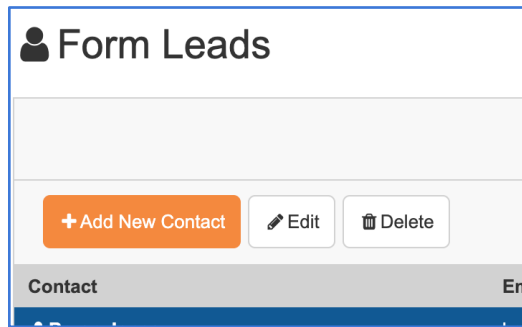
The screenshot shows three dropdown menus for filtering leads: 'Contact Type', 'Sort', and 'Show'. The 'Show' menu is currently set to '1'.



- On the Form Leads page, select a contact.



- Optionally, click Add New Contact, Edit, or Delete.



### Download Lead Report

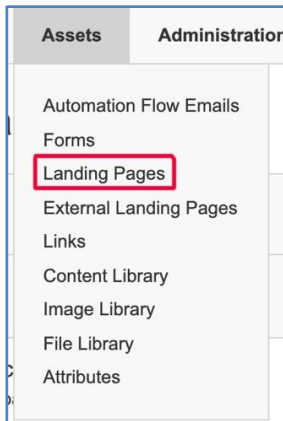
- Optionally, select a Form. Using the More dropdown menu, select **Download Lead Report**.
- Save the form as a .csv file to your computer or device.

## Landing Pages

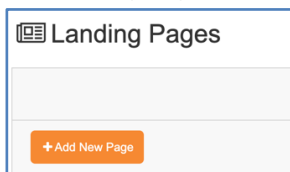
Your single, dedicated landing page – the one potential customers see (and, ideally, act upon) when they click on a link in your email campaign – needs to be immediate, simple, focused, compelling, and ultimately effective. This is the place to create one (or as many as you need).

### Create a Landing Page

- Under Assets, select **Landing Pages**.



- On Landing Pages, click **Add New Page**.

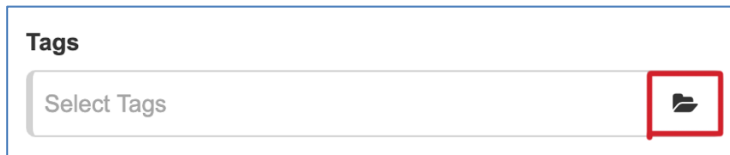


- On Add New Page, in panel on the left, the Page Name field, enter a name.

- Optionally, select the check box beside **Connect this Page to Menu**.
- Optionally, in the Description field, add a description.
- In the Template field, use the dropdown menu to select a Template.

## Tags

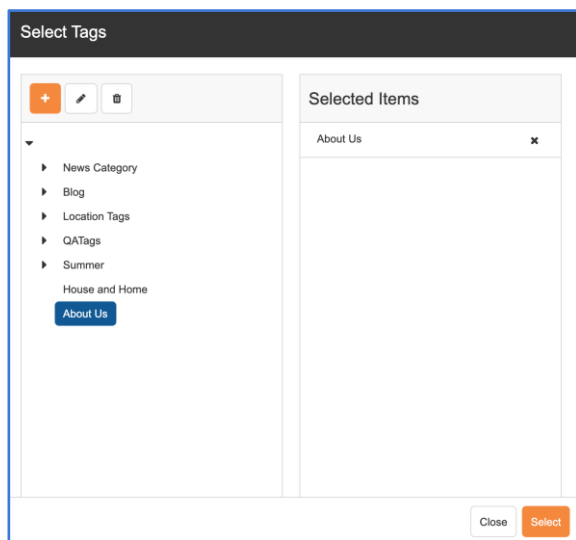
- Optionally, in the Tags field, click the folder icon.



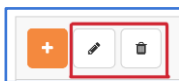
- On the Select Tags, page, click the **Add** icon to add a tag, or select one from the list.



- In the Selected Items panel, click **Select**.



- Optionally, use the edit or delete icons to edit or delete tags in the list.

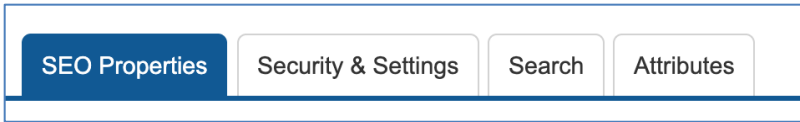


## Other Page options

There are four tabs on a page:

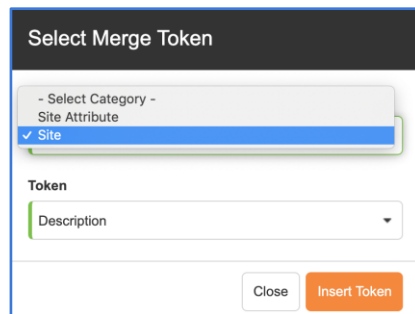
- SEO Properties
- Security & Settings

- Search
- Attributes



### SEO Properties

- Under the SEO Properties tab, the URL-Friendly Name is automatically populated.
- Optionally, enter:
  - Title Tag
  - H1 Tag
  - Keywords
  - Descriptive Metadata
  - Other Metadata
- Optionally, click **Insert Dynamic Token**.
  - In the Select Merge Token dialog, use the dropdown arrows for Category and Site to make your selections.

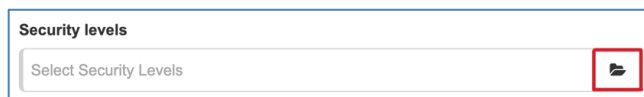


- Click **Insert Token**.

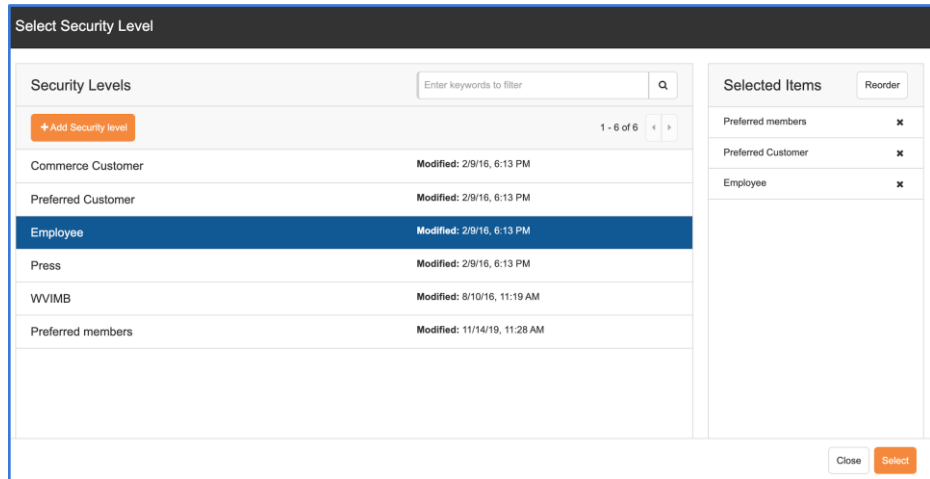
### Security & Settings

#### Security Levels

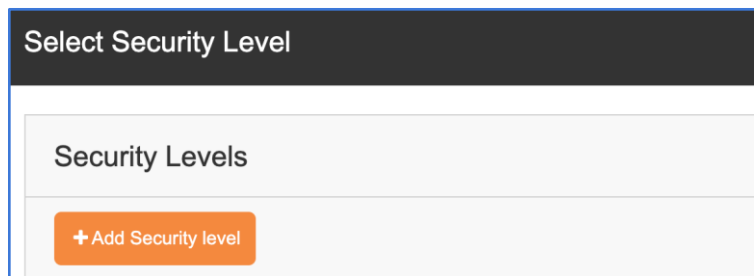
- Optionally, under the Security & Settings tab, in the Security Levels field, click the folder icon.



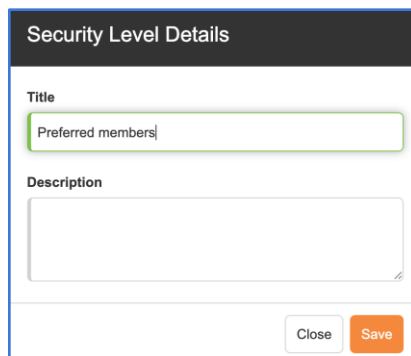
- On the Select Security Level page, select a Security Level.



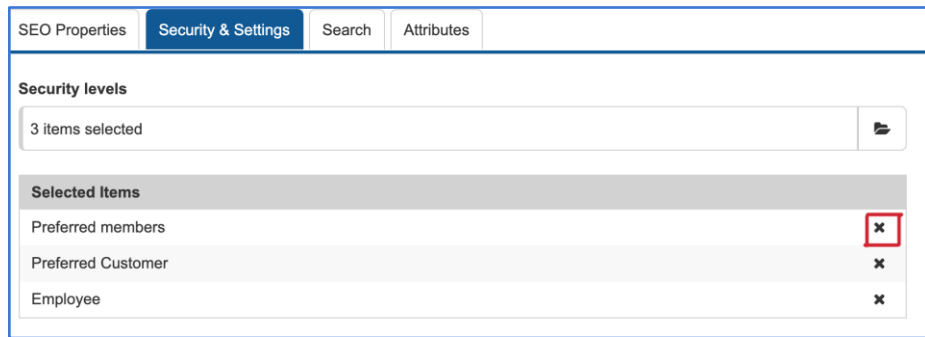
- In the Selected Items panel, click **Select**; or **Close** to return to Add New Page.
- Optionally, click **Add Security level**.



- In the Security Level Details dialog, enter a Title. Optionally, enter a Description.



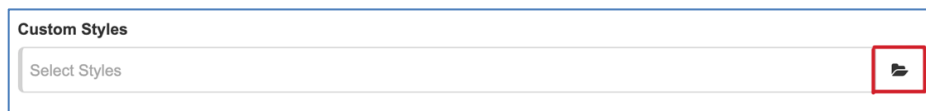
- Click **Save**.
- When you return to the new page, you have the option of deleting a selected item or items under the Security & Settings tab.



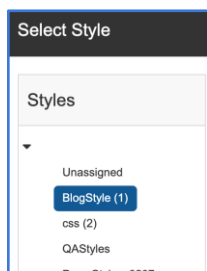
- Optionally, enter Custom Styles, Custom Scripts and Distribution Targets.

### Custom Styles

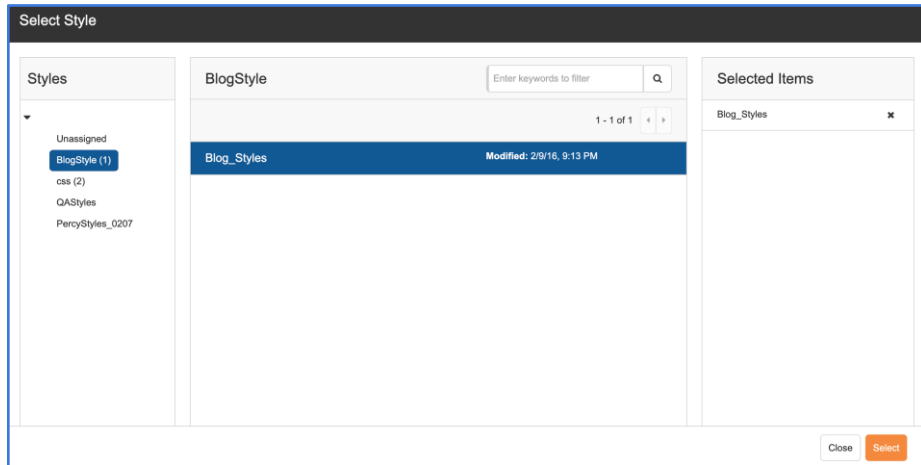
- In the Custom Styles field, click the folder icon.



- On the Select Style page, in the Styles panel, select a style.



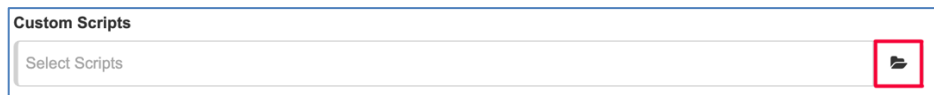
- In the Style list, make a selection.



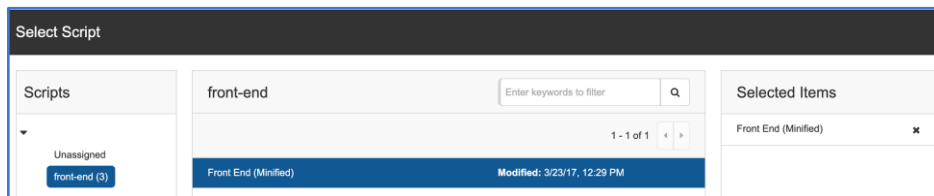
- In the Selected Items panel, click **Select**.

### Custom Scripts

- In the Custom Scripts field, click the folder icon.

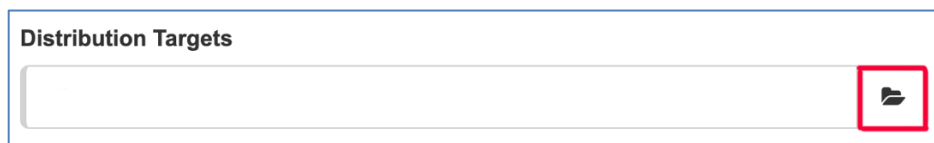


- On the Select Script page, in the Scripts panels, select a script.
- In the Selected Items panel, click **Select**.



### Distribution Targets

- In the Distribution Targets field, click the folder icon.



- On the Select Site List, select a site or sites.
- In the Selected Items panel, click **Select**.

- Optionally, use the check box to select Exclude from Bulk Translation.

The screenshot shows a panel titled "Selected Items" with a grey header. Below the header, there is a text input field containing "All Child Sites" and a small "x" icon to its right. Below the input field, there is a checkbox labeled "Exclude from Bulk Translation".

## Search

- In the panel under the Search tab, select or clear the check boxes beside:
  - Exclude from search engines, robots.txt and sitemap.xml
  - Exclude from iAPPS search

The screenshot shows the "Add New Page" form. The "Page Name" field contains "About Us". Below it is a checkbox labeled "Connect this Page to Menu". The "Description" field is empty. On the right side, there are four tabs: "SEO Properties", "Security & Settings", "Search", and "Attributes". The "Search" tab is active. Under the "Search" tab, there are two checkboxes: "Exclude from search engines, robots.txt and sitemap.xml" and "Exclude from iAPPS search".

## Attributes

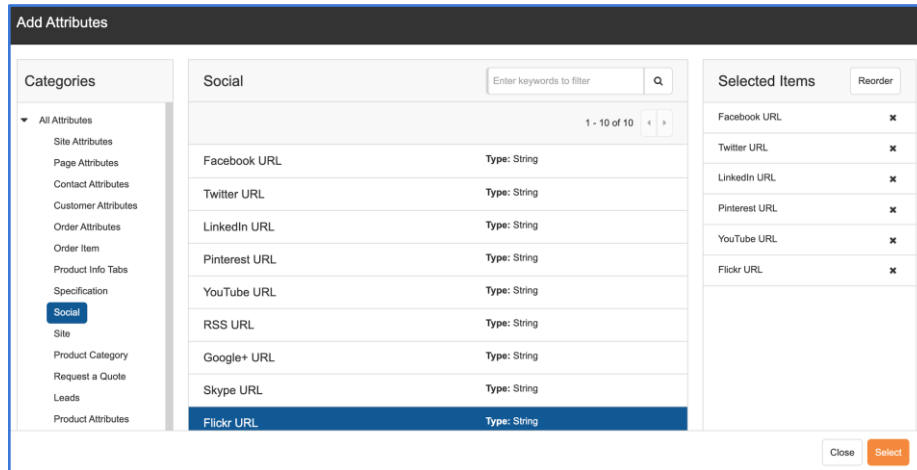
- Optionally, under the Attributes tab, in the panel on the right, fill in the fields – for example:
  - Enumerated
  - New Buyers
  - String Enabled Value Translation False
  - String Enabled Value Translation True
  - HTML Enable Value Translation False
  - HTML Enable Value Translation True

**Note:** These fields are not standard and can vary for each site.

- Optionally, under each field, select the check boxes beside **Propagate?** and/or **Editable?**
- Optionally, at the bottom of the page, to add more attributes, click **Add Attribute(s)**.

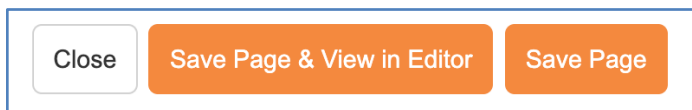
[Add Attribute\(s\)](#)

- On the Add Attributes page, in the Categories panel, select a category of Attributes.
- In the Attributes panel, make further selections.



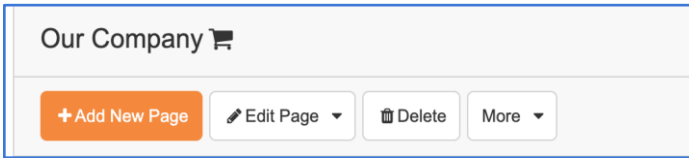
- In the Selected Items panel, click **Select**.
- On Add New Page, Attributes tab, in the new fields for the further attributes you have chosen, fill in the information and, optionally, select the check boxes.

When you have entered all your information to the New Page, click **Save Page & View in Editor**; or **Save Page**.



## More options

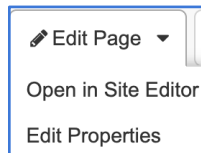
- You can revise and delete your new page.



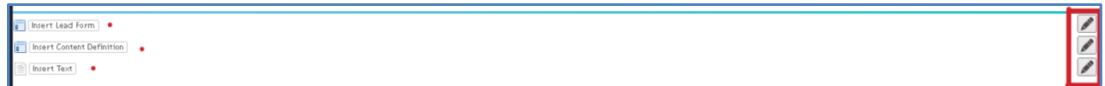
- You can also take other steps.

### Edit a page

- To edit or view your page, select your page from its category in the panel on the left; and from the page list in the panel on the right.
- Click **Edit Page**.
- Use the dropdown arrow to Open in Site Editor or to Edit Properties.



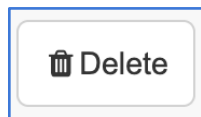
- If you choose Open in Site Editor, click the pencil icon to edit or add content.



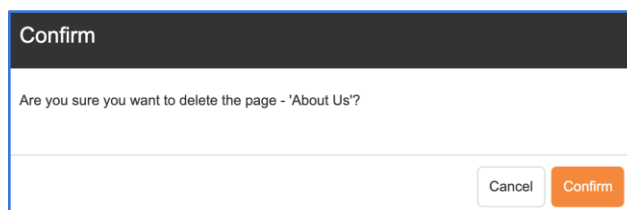
- If you choose Edit Properties, on the Edit Details page, make any revisions or additions.

### Delete a page

- To remove the page, click **Delete**.



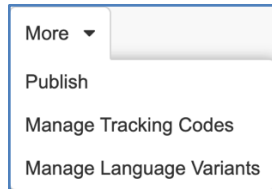
- In the Confirm dialog, click **Confirm**.



## The More menu

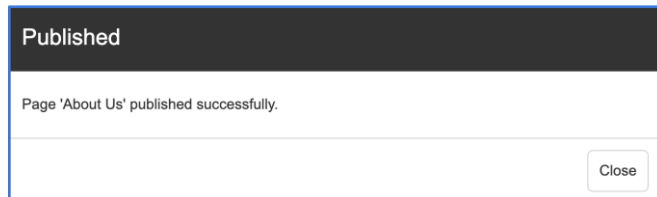
Use the “More” dropdown arrow to:

- Publish
- Manage Tracking Codes
- Manage Language Variants



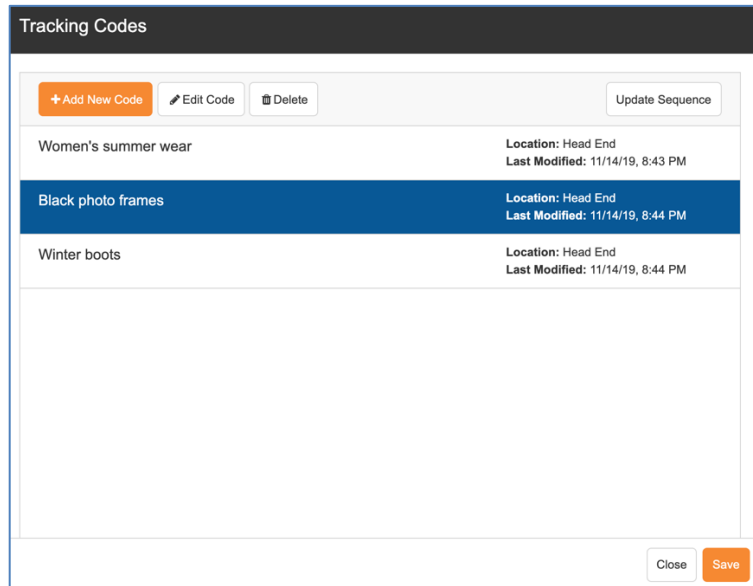
## Publish

- To Publish your page, in the More dropdown menu, select **Publish**.
- A dialog confirms this.

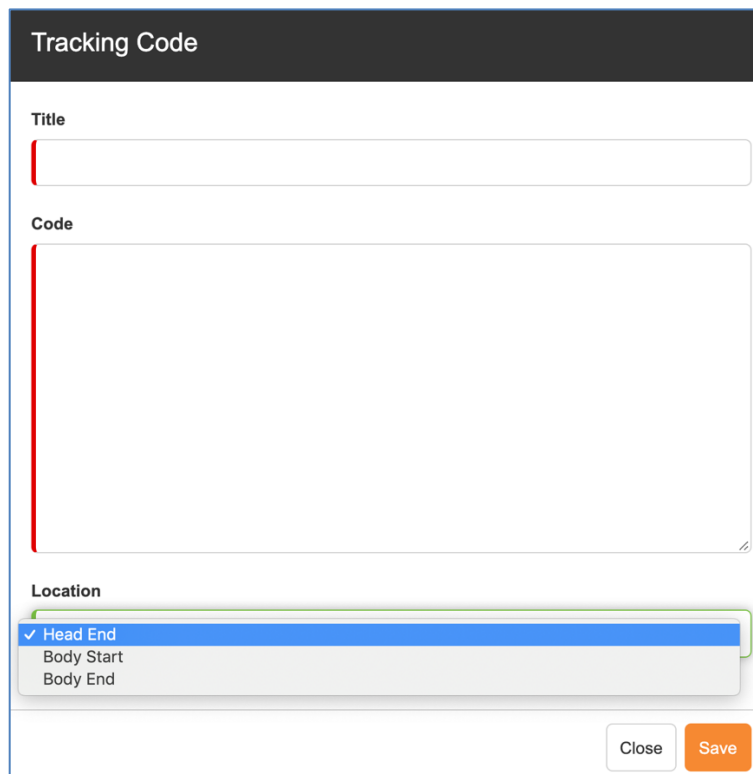


## Manage Tracking Codes

- To view or update tracking codes, in the More dropdown menu, select **Manage Tracking Codes**.
- On the Tracking Codes page, select a code.
- Click **Add New Code** or **Edit Code**.

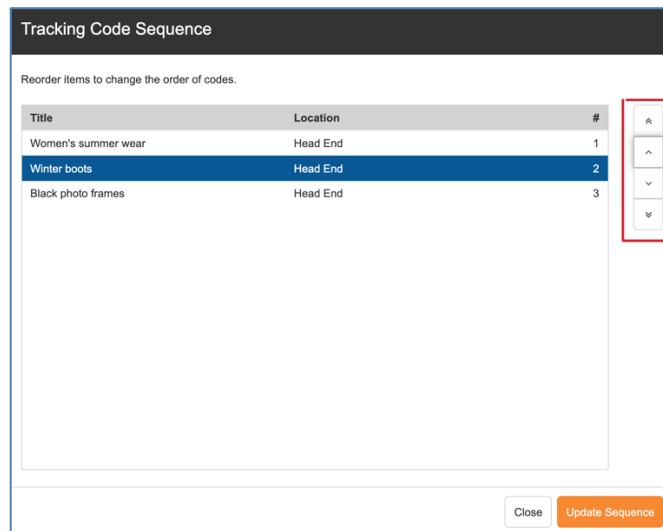


- In the Tracking Code dialog, enter a Title, Code, and Location.



- Click **Save**.
- Alternately, to change the sequence of codes, select a code from the list.

- In the Tracking Code Sequence dialog, select a code.
- Use the arrows at the right to move it up or down in the list.



- Click **Update Sequence**, or **Close**.
- On the Tracking Codes page, click **Save**.
  - Optionally, to remove a code, click **Delete**.

### Manage Language Variants

- To view or update Language Variants, in the More dropdown menu, select **Language Variants**.
- Optionally, on the Language Variants page, click **Add New Variant**.



- In the Language Variant dialog, enter Variant Type, URL, and Culture.

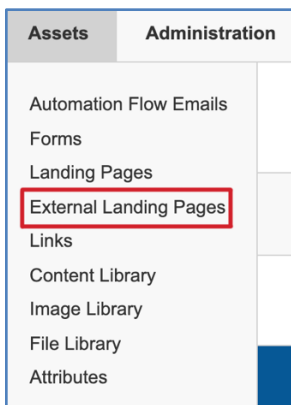
- Click **Save**.
- On the Language Variants page, click **Close**.

## External Landing Pages

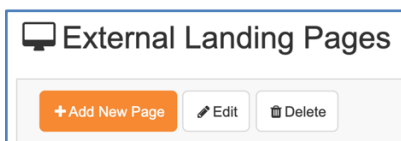
It's a simple matter to point your leads or customers to an external landing page.

### Create an External Landing Page

- Under Assets, select **External Landing Pages**.



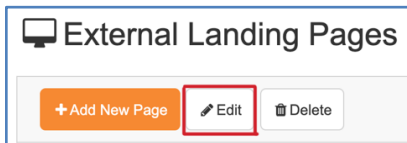
- On External Landing Pages, click **Add New Page**.



- In the External Landing Page dialog, enter a Name and URL.
- Click **Save**.

### Edit an External Landing Page

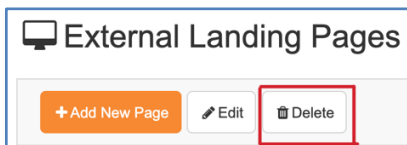
- Select an External Landing Page from the list.
- Click **Edit**.



- In the External Landing Page dialog, make any revisions.
- Click **Save**.

### Delete an External Landing Page

- Select an External Landing Page from the list.
- Click **Delete**.



- In the Confirm dialog, click **Confirm**.

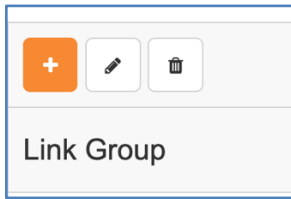
## Links

This is the place to store, create, and manage all your links.

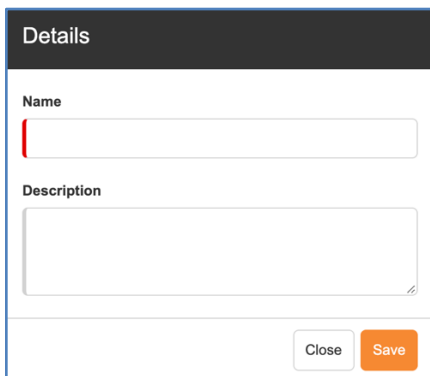
- Under Assets, select **External Landing Pages**.

### Add a Link Group

- On the Managed Links page, in the Link Group panel on the left, click the **Add** icon.



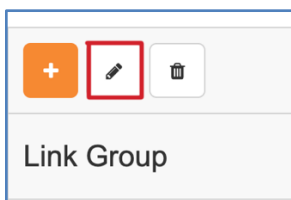
- In the Details dialog, enter a Name. Optionally, enter a description.

A screenshot of a 'Details' dialog box. The title bar is dark grey with the word 'Details' in white. Below the title bar, there are two input fields: 'Name' and 'Description'. The 'Name' field is a single-line text input, and the 'Description' field is a multi-line text input. At the bottom right of the dialog, there are two buttons: 'Close' and 'Save'. The 'Save' button is orange, and the 'Close' button is white with a grey border.

- Click **Save**.

### Edit a Link Group

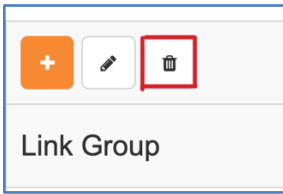
- On the Managed Links page, in the Link Group panel on the left, click the **Edit** icon.



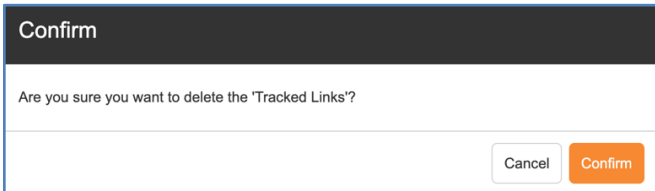
- In the Details dialog, make any revisions.
- Click **Save**.

### Delete a Link Group

- On the Managed Links page, in the Link Group panel on the left, click the **Delete** icon.



- In the Confirm dialog, click **Confirm**.



### Add a Link

- On the Managed Links page, in the panel on the right, click **Add New Link**.
- In the Managed Links dialog, enter a Name and URL.



- Click **Save**.

### Edit a Link

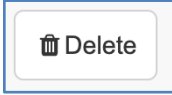
- On the Managed Links page, in the panel on the right, select a link.
- Click **Edit**.



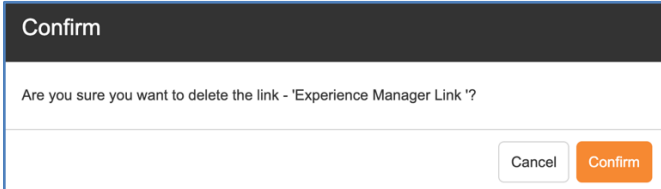
- In the Managed Links dialog, make any revisions.
- Click **Save**.

### Delete a Link

- On the Managed Links page, in the panel on the right, select a link.
- Click **Delete**.



- In the Confirm dialog, click **Confirm**.

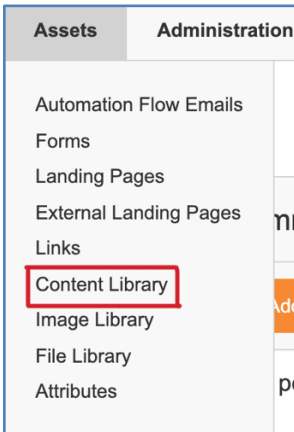


### Content Library

As perhaps one of your most basic (and necessary) marketing assets, your content needs to be created, organized, managed, and easy to find. Your Content Library is the place for all of it.

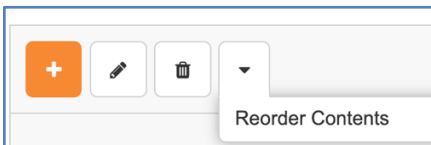
#### Navigating your Content Library

- Under Assets, select **Content Library**.



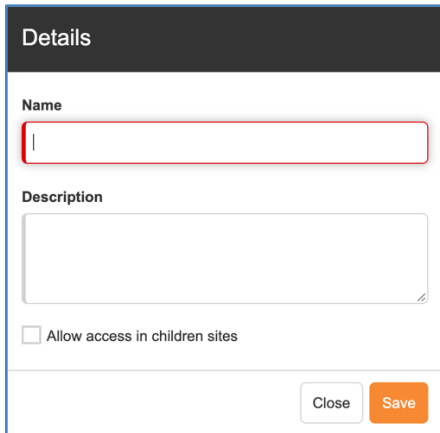
#### Manage Content categories

- On the Content Items page, at the top of the panel on the left, use the icons to add, edit, delete, and reorder.



### Add a content category

- On the Content Items page, at the top of the panel on the left, click the **Add** icon.
- In the Details dialog, enter a name.



The 'Details' dialog box has a dark header with the title 'Details'. Below the header, there is a 'Name' label followed by a text input field with a red border. Underneath is a 'Description' label followed by a larger text area. At the bottom left, there is a checkbox labeled 'Allow access in children sites'. At the bottom right, there are two buttons: 'Close' and 'Save'.

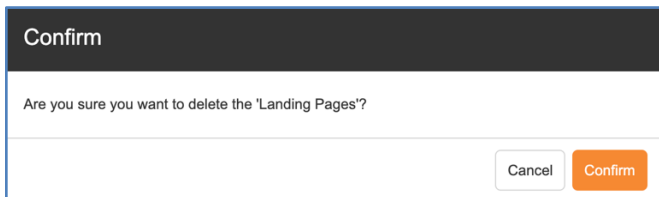
- Optionally, enter a Description.
- Optionally, select the check box beside Allow access in children sites.
- Click **Save**.

### Edit a content category

- On the Content Items page, in the panel on the left, select a category.
- At the top of the panel, click the **Edit** icon.
- In the Details dialog, make any revisions.
- Click **Save**.

### Delete a content category

- On the Content Items page, in the panel on the left, select a category.
- At the top of the panel, click the **Delete** icon.
- In the Confirm dialog, click **Confirm**.

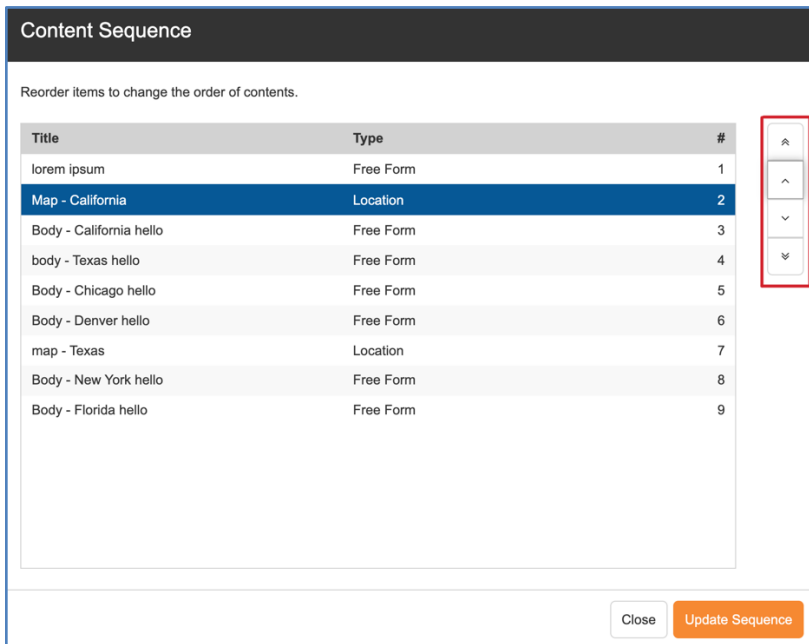


The 'Confirm' dialog box has a dark header with the title 'Confirm'. Below the header, there is a question: 'Are you sure you want to delete the 'Landing Pages'?'. At the bottom right, there are two buttons: 'Cancel' and 'Confirm'.

### Reorder contents

- To reorder the contents in a category, on the Content Items page, in the panel on the left, select a category.
- At the top of the panel, click the dropdown arrow and select **Reorder Contents**.

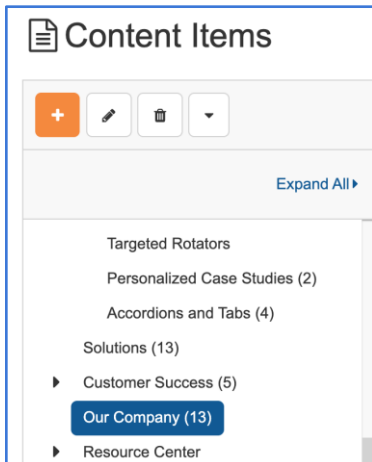
- In the Content Sequence dialog, use the arrows at the right to change the order of items in the list.



- Click **Update Sequence**.

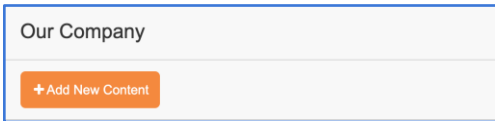
### Manage content items

- From the Menu panel, select a category or menu name.

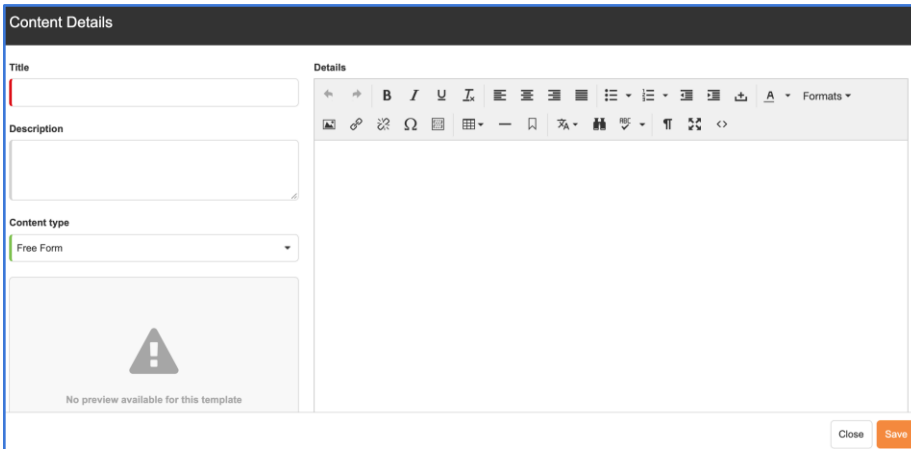


### Add New Content

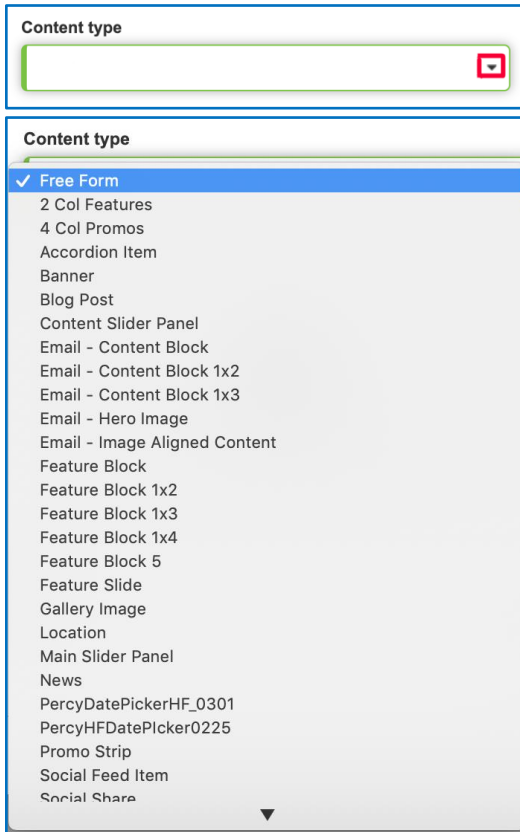
- In the Content panel, click **Add New Content**.



- On the Content Details page, enter a Title.



- Optionally, enter a Description.
- In the Content type field, use the dropdown arrow for a menu of a variety of content types.



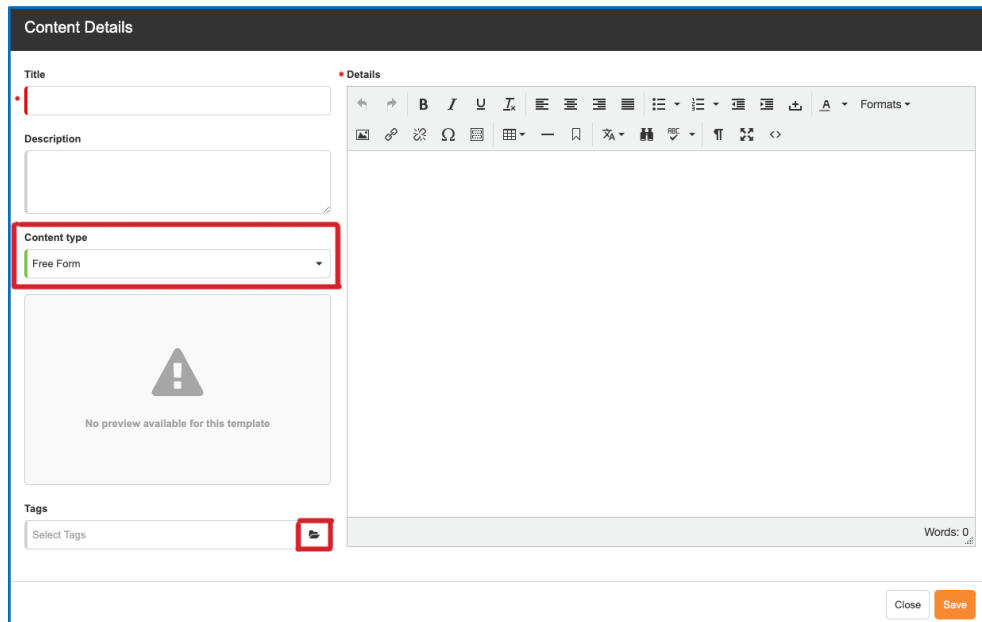
### Content Library: Content Type options

The Content Type template you choose to create will impact your next steps and the further actions you can take. Each piece of content belongs to a content type. These templates determine how the content appears and behaves on your site.

#### Free Form Content Type

Free Form is the default content type. When you choose this type, you have few limitations and can easily use the Rich Text Editor; at this point you can't select the page where it will reside.

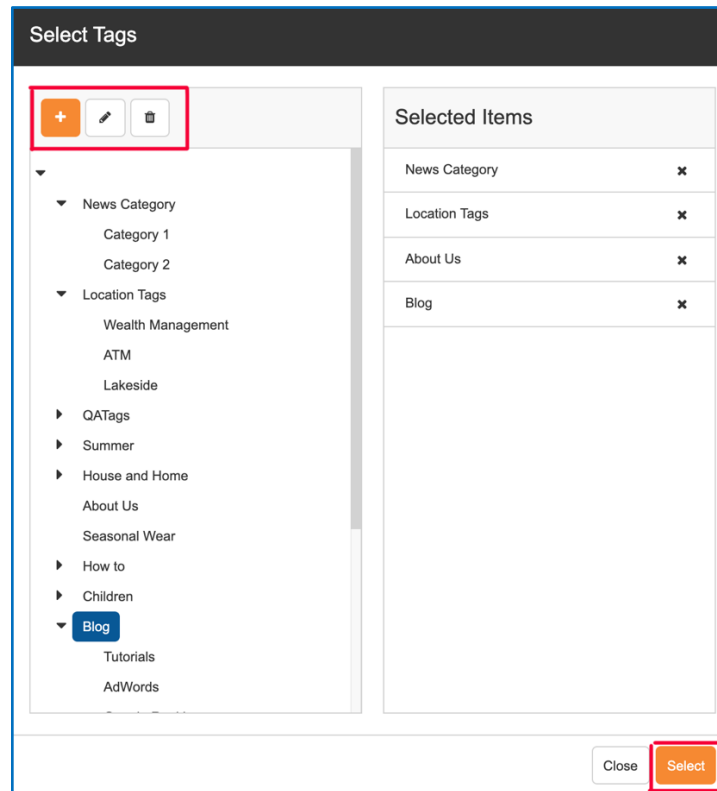
- On the Content Details page, in the Title field, enter a title.



- Optionally, in the left panel, in the Description field, enter a description.
  - The Content Type default is Free Form.
- Optionally, in the Tags field, click the folder icon.



- On the Select Tags page, select a category.
- Optionally, use the icons to Add, Edit or Delete a Tag.

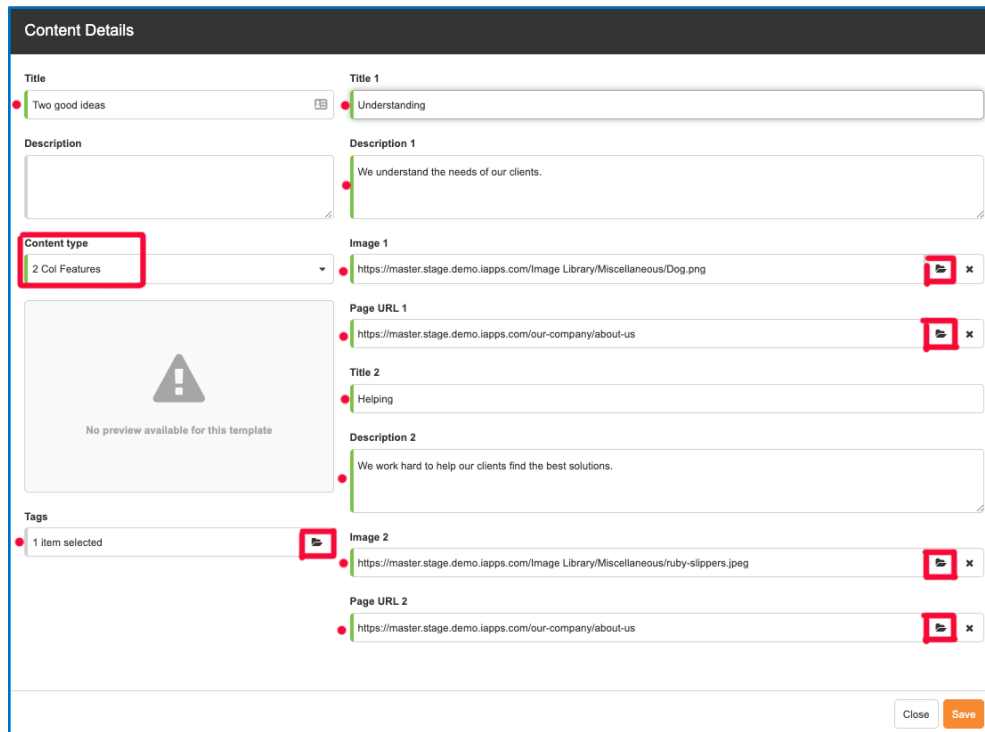


- In the Selected Items panel, click **Select**.
- Under Details (on the Content Details page), enter your content using the Rich Text Editor. (See [Using the Rich Text Editor](#).)
- Click **Save**.

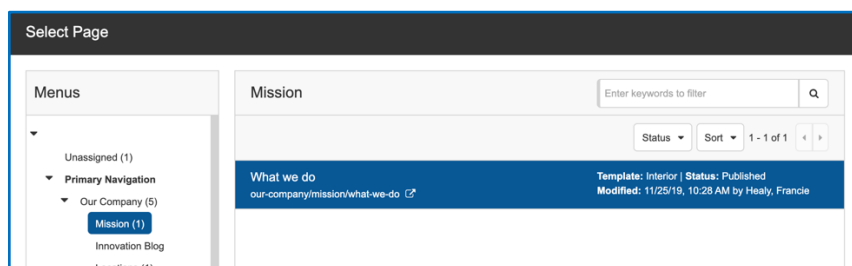
### 2 Col Features Content type

If you select **2 Col Features** in the Content Type menu, you will see many more fields that require your input.

- On the Content Details page, enter a Title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **2 Col Features**.



- Optionally, in the Tags field, click the folder icon.
- On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Under Title 1, enter a Title.
- Under Description 1, enter your text.
- In the Image 1 field, click the folder icon.
  - On the Select Image page choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Once you have chosen your image, click **Select**.
- In the Page URL 1 field, click the folder icon.
- On Select Page, choose the category where your intended page resides.
- In the panel on the right, select the page.



- Under Title 2, enter a Title.
- Under Description 2, enter your text.
- In the Image 2 field, click the folder icon.
  - On the select Image page, choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Once you have chosen your image, click **Select**.
- In the Page URL2 field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- On the Content Details page, click **Save**.

#### 4 Col Promos Content type

- If you select **4 Col Promos** in the Content Type menu, you will see still more fields that require your input.
- On the Content Details page, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **4 Col Promos**.

**Content Details**

**Title**  
Winter sale

**Description**

**Content type**  
4 Col Promos

**Tags**  
5 items selected

**Title 1**  
Keep warm this winter

**Image 1**  
https://master.stage.demo.iapps.com/Image Library/Unassigned/many-hats.png

**Link Text 1**  
We have hats! Many hats, warm hats...and they're on sale!

**Page URL 1**  
https://master.stage.demo.iapps.com/products/on-sale/on-sale

**Title 2**  
A warm head is a happy head

**Image 2**  
https://master.stage.demo.iapps.com/Image Library/Unassigned/Yellow-baby-hat.jpg

**Link Text 2**  
Keep baby's head covered in warmth and style.

**Page URL 2**  
https://master.stage.demo.iapps.com/products/on-sale/on-sale

**Title 3**  
Mom needs to be warm, too.

**Image 3**  
https://master.stage.demo.iapps.com/Image Library/Unassigned/Grey-hat.jpg

**Link Text 3**  
Simple, elegant, stylish hat with a hidden agenda -- your warm head.

**Page URL 3**  
https://master.stage.demo.iapps.com/products/on-sale/on-sale

**Title 4**  
Staying warm is not only sensible. It's fun!

**Image 4**  
https://master.stage.demo.iapps.com/Image Library/Unassigned/multi-coloured-child-s-hat.jpg

**Link Text 4**  
Add color and pizzazz to your child's winter

**Page URL 4**  
https://master.stage.demo.iapps.com/products/on-sale/on-sale

Close Save

- Optionally, in the Tags field, click the folder icon.
- On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Under Title 1, enter a title.
- In the Image 1 field, click the folder icon.
  - On the Select Image page choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Once you have chosen your image, click **Select**.
- In the Link Text 1 field, enter your text.
- In the Page URL 1 field, click the folder icon.

- On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- In the Title 2 field, enter a title.
- In the Image 2 field, click the folder icon.
  - On the Select Image page choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- In the Link Text 2 field, enter your text.
- In the Page URL 2 field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- In the Title 3 field, enter a title.
- In the Image 3 field, click the folder icon.
  - On the Select Image page choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- In the Link Text 3 field, enter your text.
- In the Page URL 3 field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- In the Title 4 field, enter a title.
- In the Image 4 field, click the folder icon.
  - On the Select Image page choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- In the Link Text 4 field, enter your text.
- In the Page URL 4 field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- On the Content Details page, click **Save**.

#### Accordion Item Content Type

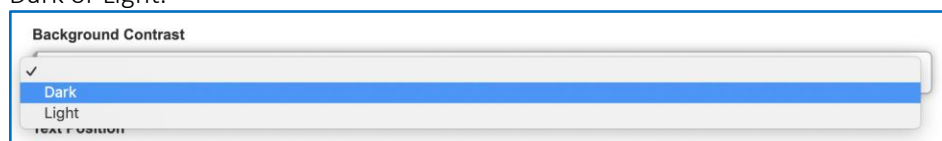
- If you select Accordion Item in the Content type menu, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Accordion Item**.

- Optionally, in the Tags field, click the folder icon.
- On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Under Details, enter your content using the Rich Text Editor. (See **Using the Rich Text Editor**.)

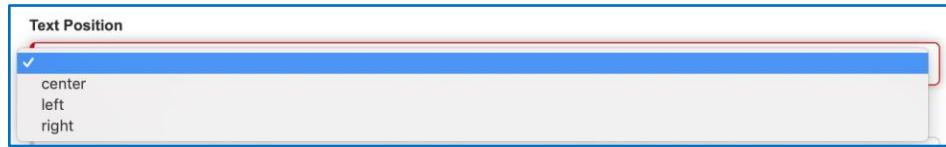
### Banner Content Type

- If you select Accordion Item in the Content type menu, in the panel on the left, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, use the dropdown arrow to select **Banner** from the menu.

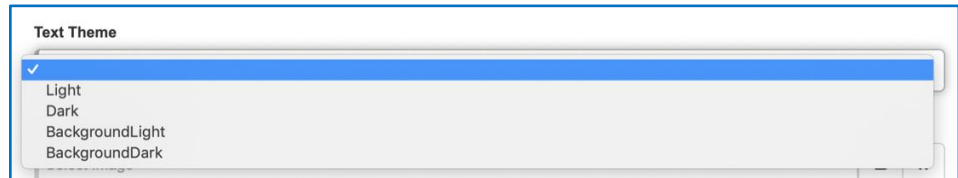
- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally, in the panel on the right, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- Optionally, in the Subtitle field, enter a subtitle.
- Optionally, in the Background Contrast field, use the dropdown arrow to select Dark or Light.



- In the Text Position field, use the dropdown arrow to select center, left, or right.



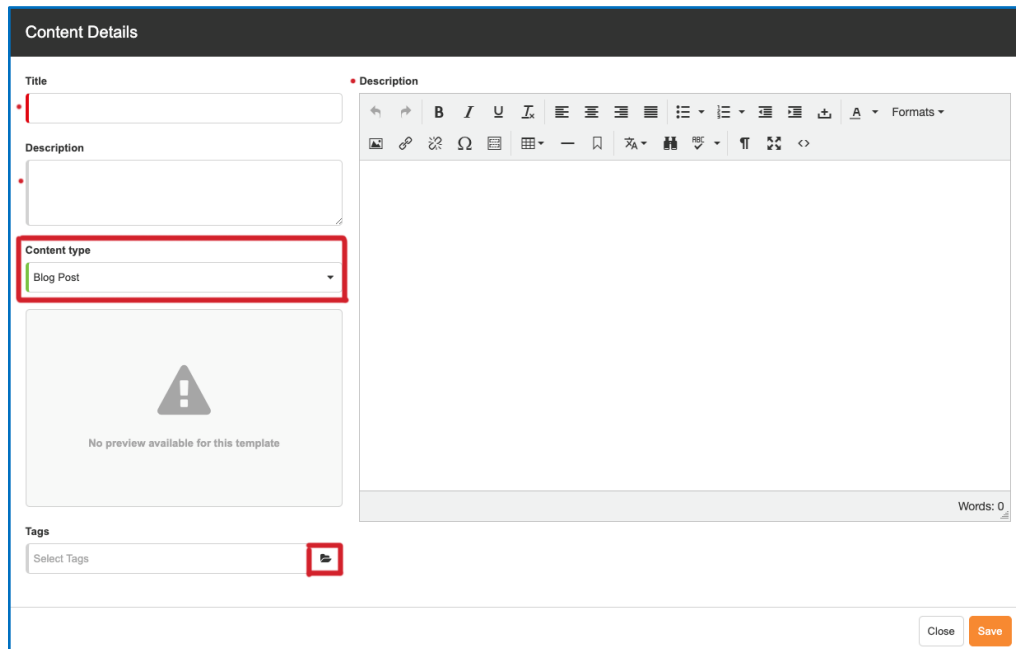
- Optionally, in the Text Theme field, use the dropdown arrow to select Light, Dark, BackgroundLight, or BackgroundDark.



- Optionally, in the Background Image field, click the folder icon.
  - On the Select Image page choose an Image category.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Optionally, select the check box beside Fixed Background.
- Optionally, in the Callout Button Text field, enter your text.
- Optionally, in the Callout CSS Class, enter the information.
- Optionally, in the Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- Optionally, in the Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
  - When you have chosen your targeted file, click **Select**.
- Optionally, in the Target External URL field, enter the targeted URL.
- Click **Save**.

### Blog Post Content Type

- If you select Blog Post as your content type, it will be similar to the Freeform Content Type.
- On the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, add a description.



- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the Description section on the right, enter your text and/or images using the Rich Text Editor. (See [Using the Rich Text Editor](#).)
- Click **Save**.

#### Content Slider Panel Content Type

- If you choose Content Slider Panel Content Type, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content Type field, use the dropdown arrow to select **Content Slider Panel**.

The screenshot shows the 'Content Details' form with the following fields and values:

- Title:** Quote from Antoine de Saint-Exupery (Slider)
- Background Contrast:** Light
- Description:** (Empty)
- Content:** It is only with one's heart that one can see clearly.
- Content type:** Content Slider Panel
- By Line:** Antoine de Saint-Exupéry, The Little Prince
- Tags:** 2 items selected

A warning message states: "No preview available for this template".

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the Background Contrast field, use the dropdown arrow to select Dark or Light.
- In the Content field, enter the text for your slider.
- In the Byline field, enter the author of the slider text.
- Click **Save**.

### Email Content Types

These content types are meant for email campaigns. They are editable in Properties or in the Email Site Editor.

#### Email – Content Block Content Type

- If you choose Email-Content Block content type, on the Content Details page in the Title field, enter a Title.
  - Optionally, in the Description field, enter a Description.
- In the Content Type field, using the dropdown arrow, select **Email – Content Block**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the Content field, enter your text.
- Optionally, in the Button Text field, enter button text.
- Optionally in the Button Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
  - Click **Select**.
- Optionally, in the Button Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
  - When you have chosen your targeted file, click **Select**.
  - Optionally, in the Button Target External URL field, enter a URL.
- On the Content Details page, click **Save**.

#### Email – Content Block 1x2 Type

- If you choose Email – Content Block 1x2 Type, you can create your content so it appears in a Left and Right block of text. You can also include images.
- On the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Email – Content Block 1x2**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, under Left Content Block, in the Image field, click the folder icon.
- On the Select Image page choose an Image category.
- In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Optionally, in the Image Alt Text field, enter your text.
- In the Content field, enter your content.
- Under Right Content Block, in the image field, click the folder icon.
- On the Select Image page choose an Image category.
- In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Optionally, in the Image Alt Text field, enter your text.
- In the Content field, enter your Content.
- Click **Save**.

#### Email – Content Block 1x3 Type

- If you choose Email – Content Block 1x3 Type, it will be similar to Email – Content Block 1x2 Type, except that you can create your content, including images, so it appears in three places – a Left, Middle and Right block of text.
- On the Content Details page, in the Title field, enter a title.
- Optionally, enter a Description.

- In the Content type field, select **Email – Content Block 1x3**.

The screenshot shows the 'Content Details' form with the following sections:

- Title:** A text input field.
- Description:** A text input field.
- Content type:** A dropdown menu with 'Email - Content Block 1x3' selected.
- Tags:** A 'Select Tags' button with a folder icon.
- Left Content Block:**
  - Image:** A 'Select Image' button with a folder icon.
  - Image Alt Text:** A text input field.
  - Content:** A text input field.
- Middle Content Block:**
  - Image:** A 'Select Image' button with a folder icon.
  - Image Alt Text:** A text input field.
  - Content:** A text input field.
- Right Content Block:**
  - Image:** A 'Select Image' button with a folder icon.
  - Image Alt Text:** A text input field.
  - Content:** A text input field.

At the bottom right, there are 'Close' and 'Save' buttons.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, under **Left Content Block**, in the Image field, click the folder icon.
- On the Select Image page, choose an image category.
- In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Optionally, in the Image Alt Text field, enter your text.
- In the Content field, enter your Content.
- Under **Middle Content Block**, in the image field, click the folder icon.
- On the Select Image page choose an Image category.
- In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Optionally, in the Image Alt Text field, enter your text.
- In the Content field, enter your Content.

- Under **Right Content Block**, in the image field, click the folder icon.
- On the Select Image page choose an Image category.
- In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Optionally, in the Image Alt Text field, enter your text.
- In the Content field, enter your Content.
- Click **Save**.

#### Email – Hero Image Content Type

- If you choose Email – Hero Image Type, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content Type field, select **Email – Hero Image**.

The screenshot shows the 'Content Details' form for the 'Email – Hero Image' content type. The form is divided into several sections:
 

- Title:** Two text input fields.
- Description:** A text input field.
- Alt Text:** A text input field.
- Image:** A field with a 'Select Image' label and a folder icon (highlighted with a red box).
- Content type:** A dropdown menu with 'Email - Hero image' selected (highlighted with a red box).
- Tags:** A field with a 'Select Tags' label and a folder icon (highlighted with a red box).

 Below the Content type field, there is a warning icon and the text 'No preview available for this template'. At the bottom right, there are 'Close' and 'Save' buttons.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally in the panel on the right, enter a Title.
- Optionally, in the Alt Text field, enter your text.
- Alternately, in the Image field, click the folder icon.
- On the Select Image page choose an Image category.
- In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Click **Save**.

#### Email – Image Aligned Content Type

- If you choose the Email – Image Aligned Content type, in the Content Details page, you can opt to enter a Description.
- In the Content type field, select **Email – Image Aligned Content**.

- Optionally, in the Tags field, click the folder icon.
- On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**
- Optionally, in the panel on the right, enter a Title.
- In the Content field, enter your content.
- Optionally, in the Image field, click the folder icon.
- On the Select Image page choose an Image category.
- In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Optionally, in the Image Alt Text, enter your text.
- Optionally, in the Image Alignment field, use the dropdown arrow to select Left or Right.

- Optionally, in the Button Text field, enter your text.
  - On Select Page, choose the category where your intended page resides.

- In the panel on the right, select the page.
  - Click **Select**.
- Optionally, in the Button Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
  - When you have chosen your targeted file, click **Select**.
  - Optionally, in the Button Target External URL field, enter a URL.
- Click **Save**.

### Feature Block Type

- If you choose the Feature Block type, on the Content Details page, enter a Title.
- Optionally, in the Description field, enter a description.
- In the Content Type field, select Feature Block.

The screenshot shows the 'Content Details' form with the following fields and components:

- Title:** Two text input fields.
- Description:** Two text input fields.
- Content type:** A dropdown menu with 'Feature Block' selected, highlighted by a red box.
- Image:** A field with a folder icon and a close button.
- Target Page:** A field with a folder icon and a close button.
- Target File:** A field with a folder icon and a close button.
- Target External Uri:** A text input field.
- Callout Target Page:** A field with a folder icon and a close button.
- Callout Target File:** A field with a folder icon and a close button.
- Callout Target External Uri:** A text input field.
- Callout Button Text:** A text input field.
- Tags:** A field with a folder icon.
- Preview:** A large area with a warning icon and the text 'No preview available for this template'.
- Buttons:** 'Close' and 'Save' buttons at the bottom right.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally, in the panel on the right, enter a Title.
- Optionally, in the Description field, enter a description.
- In the Image field, click the folder icon.
- On the Select Image page choose an Image category.

- In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Optionally, in the Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- Optionally, in the Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Target External URL field, enter the targeted URL.
- Optionally, in the Callout Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- Optionally, in the Callout Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Callout Target External URL field, enter the targeted URL.
- Optionally, in the Callout Button Text field, enter the text.
- Click **Save**.

### Feature Block 1x2, 1x3, 1x4 and Feature Block 5 Types

If you choose any of these content types, you'll see they are similar. Their differences have to do with how many blocks of content you want to have on a page.

- For each of these features, on the Content Details page, in the title field, enter a title.
- Optionally, in the Description field, enter a description.

- In the Content Type field, use the dropdown arrow to select **Feature Block 1x2**, **Feature Block 1x3**, **Feature Block 1x4**, or **Feature Block 5**.


- Optionally, in the Tags field, click the folder icon.  
On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally, in the panel on the right, in the Background Contrast field, use the dropdown arrow to choose Dark or Light.


- Optionally, in the Optional Heading field, enter an optional heading.  
For each Feature Block (1x2, 1x3, 1x4 and 5)
- In the Title field for the block, enter a title.


**Left Feature Block**

**Title 1**  
•


**Description 1**  
•


**Image 1**  
•   x

**Target Page 1**  
•   x

**Target File 1**  
•   x

**Target External Url 1**  
•

**Callout Target Page 1**  
•   x

**Callout Target File 1**  
•   x

**Callout Target External Url 1**  
•

**Callout Button Text 1**  
•

**Callout CSS Class 1**  
•

- Optionally, in the Description field for the block, enter a description.
- In the Image field for the block, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Optionally, in the Target Page field for the block, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Optionally, in the Target File field for the block, click the folder icon.
  - On the Select File page, choose the category where your file resides.

- In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Target External URL field for the block, enter the targeted URL.
- Optionally, in the Callout Target Page field for the block, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page.
- Optionally, in the Callout Target File field for the block, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Callout Target External URL field for the block, enter the targeted URL.
- Optionally, in the Callout Button Text field for the block, enter the text.
- Optionally, in the Callout CSS Class field for the block, enter the information.
- When you have entered all the information you want in each Block section, click **Save**.

### Feature Slide Type

- If you choose Feature Slide, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description box, enter a description.
- In the Content Type field, select **Feature Slide**.
- 

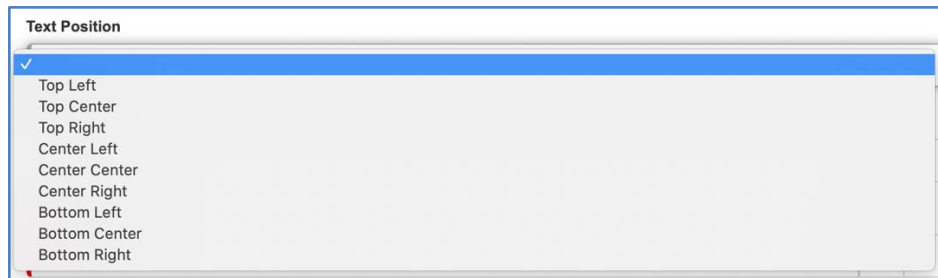
The screenshot shows the 'Content Details' form with the following fields and options:

- Title:** Two text input fields.
- Description:** Two text input fields.
- Content type:** A dropdown menu with 'Feature Slide' selected and highlighted by a red box.
- Text Position:** A dropdown menu.
- Color Theme:** A dropdown menu.
- Image (Small):** A field with a 'Select Image' button and a close icon.
- Image (Large):** A field with a 'Select Image' button and a close icon.
- Tags:** A field with a 'Select Tags' button and a close icon.
- Page URL:** A field with a 'Select Page' button and a close icon.

At the bottom right of the form are 'Close' and 'Save' buttons.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Title field, enter a title.
- In the Description field, enter a description.

- Optionally in the Text Position field, use the dropdown arrow to select the position of your text.



- Optionally, in the Color Theme field, use the dropdown arrow to select None, Dark, or Light.
- In the Image (Small) field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- In the Image (Large) field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- In the Page URL field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Click **Save**.

#### Gallery Image Type

- If you choose Gallery Image, on the Content Details page, in the Title field, enter a Title.
- Optionally, in the Description field, enter a description.
- In the Content Type field, select **Gallery Image**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Caption field, enter your text for a caption.
- In the Image (Small) field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- In the Image (Large) field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Click **Save**.

#### Location type

- If you choose Location, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Location**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Background Contrast field, use the dropdown arrow to select Dark or Light.
- In the Location Name field, enter the information.
- Optionally, in the Description field, enter a description.
- In the Address Line 1 field, enter the address.
- Optionally, in the Address Line 2, enter further address details.
- In the City field, enter the city name.
- In the State field, enter the state name.
- In the Zip Code field, enter the zip code.
- Optionally, in the Phone1 field, enter a phone number.
- Optionally, in the Phone2 field, enter an additional phone number.

- Optionally, in the Direction Link field, enter a link.
- Optionally, in the Embedded Map URL field, enter a URL.
- In the Embedded Map Position field, use the dropdown arrow to select Left or Right.
- Optionally, in the Website URL field, enter the URL.

### Main Slider Panel

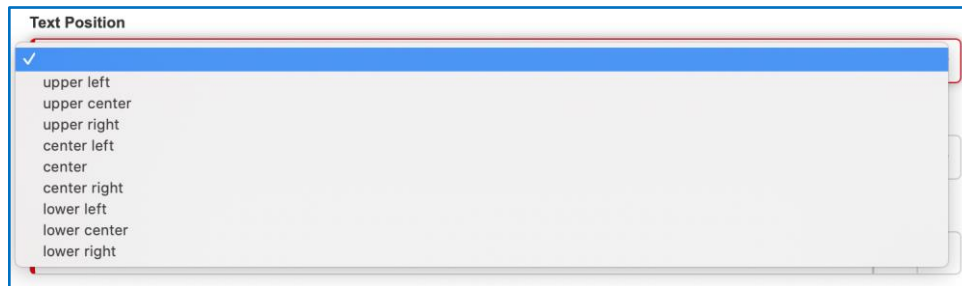
- If you choose Main Slider Panel, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Main Slider Panel**.

The screenshot shows the 'Content Details' form with the following fields and options:

- Title:** Two text input fields.
- Description:** Two text input fields.
- Content type:** A dropdown menu with 'Main Slider Panel' selected and highlighted by a red box.
- Text Position:** A dropdown menu with a red box around the arrow.
- Text Background:** A dropdown menu with a red box around the arrow.
- Main Image:** A 'Select Image' button with a folder icon and a red box around it.
- Mobile Image:** A 'Select Image' button with a folder icon and a red box around it.
- Target Page:** A 'Select Page' button with a folder icon and a red box around it.
- Target File:** A 'Select File' button with a folder icon and a red box around it.
- Target External Uri:** A text input field.
- Tags:** A 'Select Tags' button with a folder icon and a red box around it.

At the bottom right, there are 'Close' and 'Save' buttons.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally, in the panel on the right, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Text Position field, use the dropdown arrow to select a position.



- In the Text Background field, use the dropdown arrow to select none, dark, or light.
- In the Main Image field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- In the Mobile Image field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- In the Target Page field, click the folder icon.
- Optionally, in the Target Page field for the block, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Optionally, in the Target File field for the block, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Target External URL field for the block, enter the targeted URL.
- Click **Save**.

### News Type

- If you choose News, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **News**.

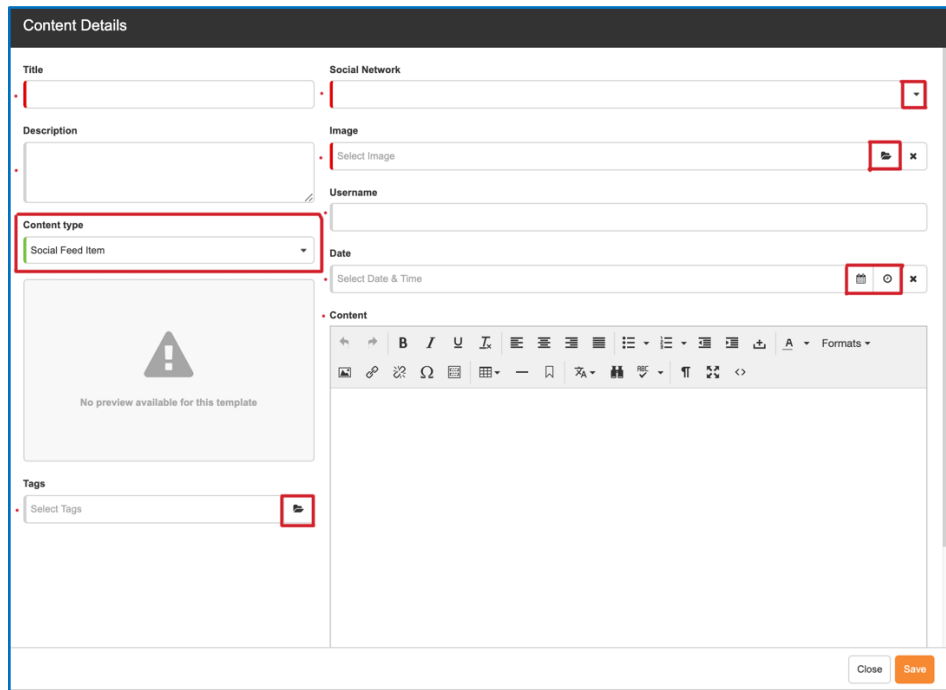
The screenshot shows the 'Content Details' form with the following elements:

- Title:** A text input field.
- Description:** A text area.
- Content type:** A dropdown menu with 'News' selected.
- Headline:** A text input field.
- Author Name:** A text input field.
- Post Date:** A date picker with a calendar icon.
- Full Copy:** A rich text editor with a toolbar.
- Tags:** A 'Select Tags' field with a folder icon.
- Preview:** A placeholder area with a warning icon and the text 'No preview available for this template'.
- Buttons:** 'Close' and 'Save' buttons at the bottom right.

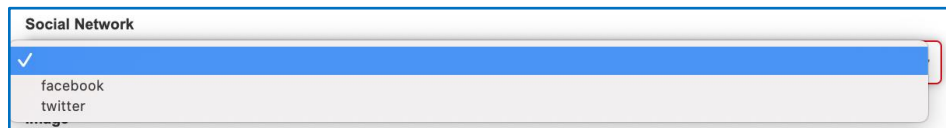
- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Headline field, enter a headline.
- Optionally, in the Author Name field, enter the name of the author.
- Optionally, in the Post Date, click the calendar icon to select a date.
- Optionally, in the Full Copy field, using the Rich Text Editor, enter your news copy (text).
- Click **Save**.

### Social Feed Item Type

- If you choose Social Feed Item type, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Social Feed Item**.



- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Social Network field, use the dropdown arrow to select the social network.



- In the Image field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- Optionally, in the Username field, enter the username.
- Optionally, in the Date field, click the calendar and clock icons to select the date and time.
- Under Content, use the Rich Text editor to enter your content.
- Click **Save**.

### Social Share Type

- If you choose Social Share, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Social Share**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally, in the panel on the right, in the Background Contrast field, use the dropdown arrow to select Dark or Light.
- Optionally in the Title field, enter a title.
- Optionally, select the check boxes beside
  - Twitter
  - Facebook
  - Email
  - Print
  - Share This
- Click **Save**.

### Spotlight Type

- If you chose Spotlight, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Spotlight**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- Optionally, in the panel on the right, in the Background Contrast field, use the dropdown arrow to select Dark or Light.
- In the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Main Image field, click the folder icon.
  - In the image list on the right, select an image or click **Add New Image** (see **Add and insert a new image**).
- In the Image Position field, use the dropdown arrow to select left or right.
- Optionally, in the Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Optionally, in the Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.

- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Target External URL field, enter the targeted URL.
- Optionally, in the Callout Button Text field, enter the text.
- Optionally, in the Callout CSS Class field, enter the information.
- Optionally, in the Callout Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Optionally, in the Callout Target External URL field, enter the URL.
- Click **Save**.

### Tab Item Type

- If you choose Tab Item, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Tab Item**.

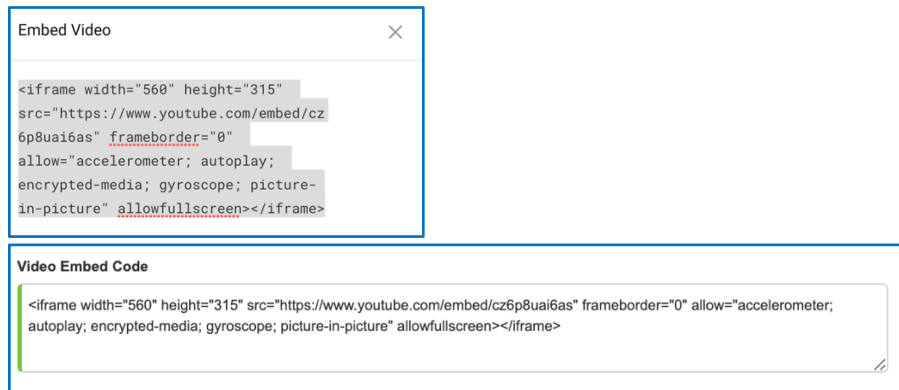
The screenshot shows the 'Content Details' form. The 'Content type' dropdown menu is highlighted with a red box and shows 'Tab Item' selected. The 'Tags' field at the bottom left has a folder icon highlighted with a red box. The 'Content' field on the right contains a rich text editor with a toolbar and a 'Words: 0' counter at the bottom right. The 'Description' field is empty. The 'Title' and 'Tab Name' fields are also empty. The 'Save' button is orange and the 'Close' button is grey.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Tab Name field, enter the tab name.
- Under Content, use the Rich Text Editor to enter your content.

### Video Type

- If you choose Video, on the Content Details page, in the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Content type field, select **Video**.

- Optionally, in the Tags field, click the folder icon.
  - On the Select Tags page, select a tag or tags. In the Selected Items panel, click **Select**.
- In the panel on the right, in the Background Contrast, use the dropdown arrow to select Dark or Light.
- Optionally, in the Title field, enter a title.
- Optionally, under Content, use the Rich Text Editor to create your text.
- In the Video Embed Code field, enter the embed code for your video.

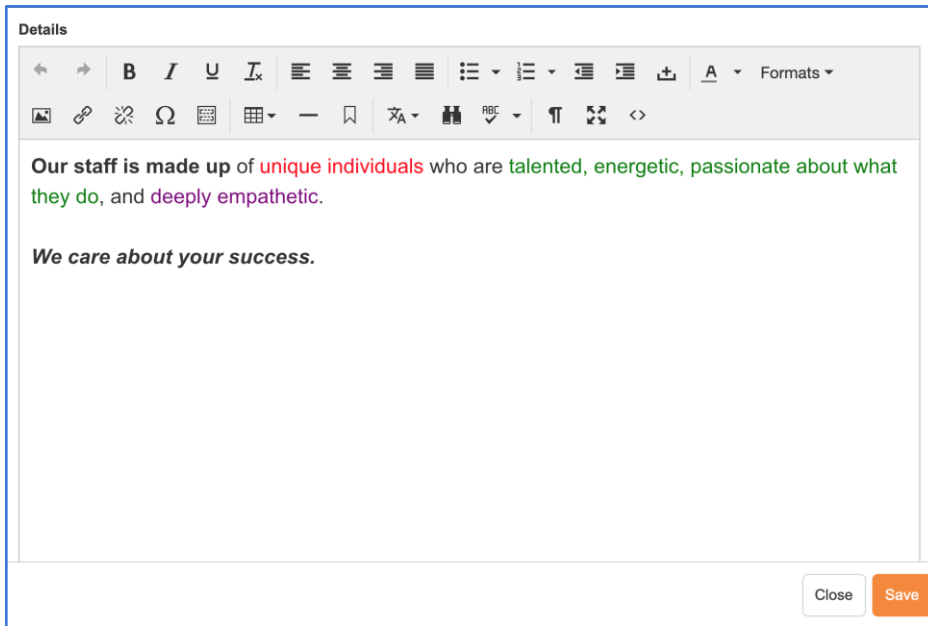


- In the Video Position field, use the dropdown arrow to select left or right.
- Optionally, in the Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Optionally, in the Target File field, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Target External URL field, enter the targeted URL.
- Optionally, in the Callout Button Text field, enter the text.
- Optionally, in the Callout CSS Class field, enter the information.
- Optionally, in the Callout Target Page field, click the folder icon.
  - On Select Page, choose the category where your intended page resides.
  - In the panel on the right, select the page. Click **Select**.
- Optionally, in the Callout Target File, click the folder icon.
  - On the Select File page, choose the category where your file resides.
  - In the panel on the right, select the file.
    - Alternately, click **Add New File** to add a Single File or Multiple Files.
- When you have chosen your targeted file(s), click **Select**.
- Optionally, in the Callout Target External URL field, enter the URL.
- Click **Save**.

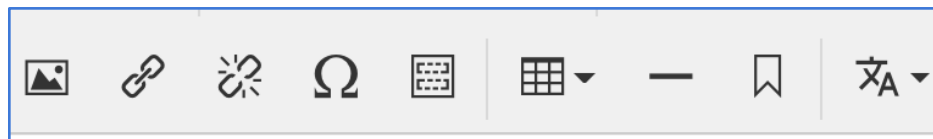
### Using the Rich Text Editor

In certain content types, for example, Freeform, Accordion, Blog Post, News, Social Feed Item, Tab Item and Video, you will have the option of creating content using the Rich Text Editor.

- On the Content Details page for these content types, under Details, enter your text in the large text area provided, and use the text editor to format it.



- You can also insert several useful items.

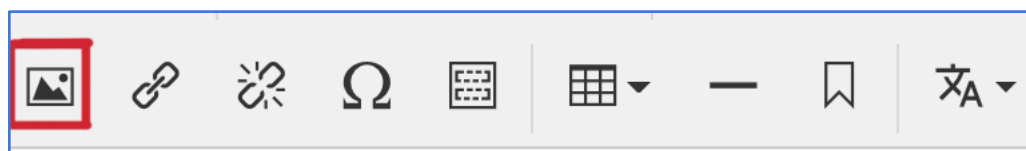


These items include:

- an image
- a link (or remove a link)
- a MergeToken
- a Snippet
- a Table
- a Horizontal line
- an anchor
- a language

### Select and insert an image

- To insert an image, click the image icon.



- In the Select Image dialog, in the Type field, use the dropdown arrow to select Image Library, Product Image, or External Image.

**Select Image**

**Type**

- ✓ Image Library
- Product Image
- External Image

**Image Url**

Select Image [Folder Icon] [Close Icon]

**Alt Text**

[Text Field]

**CSS Class**

[Text Field]

**Dimensions**

[width] [height]

**Margin (px)**

[top] [right] [bottom] [left]

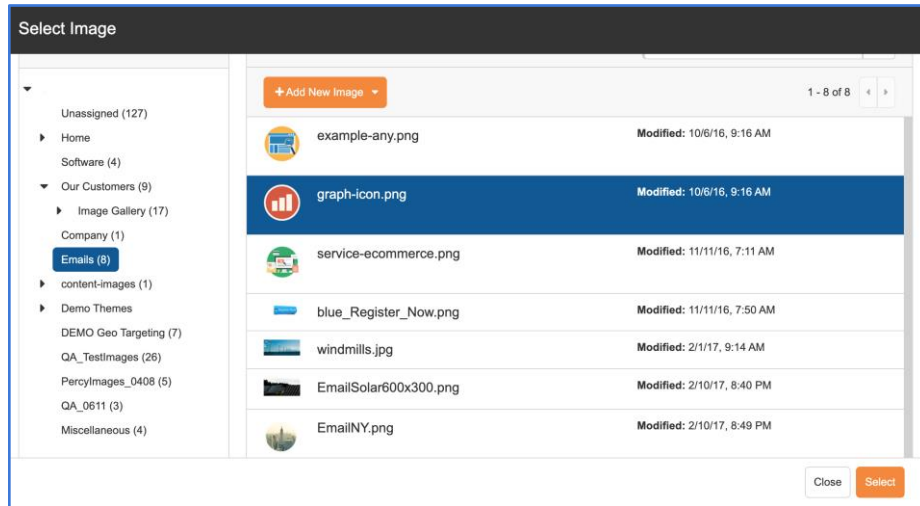
[Close] [Insert Image]

- For Image Library and Product Image, in the Image URL field, click the folder icon.

**Image Url**

Select Image [Folder Icon] [Close Icon]

- On the Select Image or Select Product Image page, in the menu panel, select a category.
- In the panel on the right, select an image. Click Select.



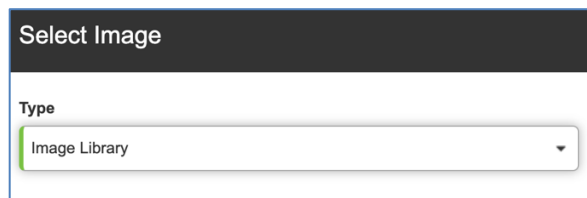
- Optionally, in the Select Image dialog, enter:
  - Alt Text
  - CSS Class
  - Dimensions and Margins (in pixels).

- Click **Insert Image**.

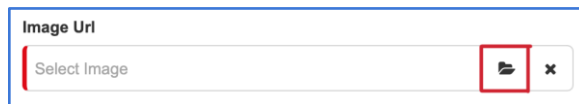
## Add and insert a new image

[Go to [Content Library: Content Type Options](#)]

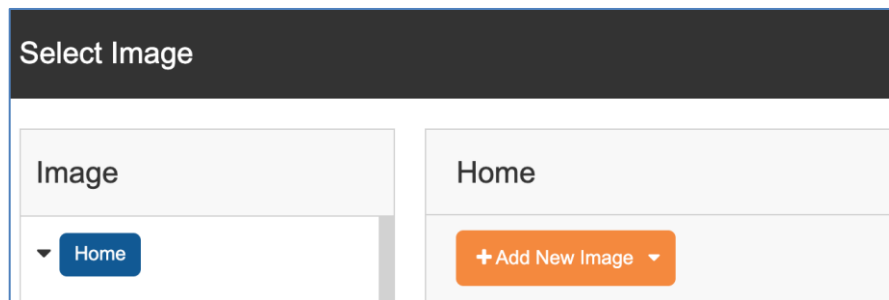
- Alternately, you can choose to add a new image to your image library and then select that new image.
- Click the image icon in the Rich Text Editor.
- In the Select Image dialog, in the Type field, use the dropdown arrow to select **Image Library**.



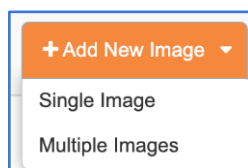
- In the Image URL field, click the folder icon.



- On the Select Image page, in the Image panel, select a category.
- In the panel on the right, click **Add New Image**.



- Use the dropdown arrow to select Single Image or Multiple Images.



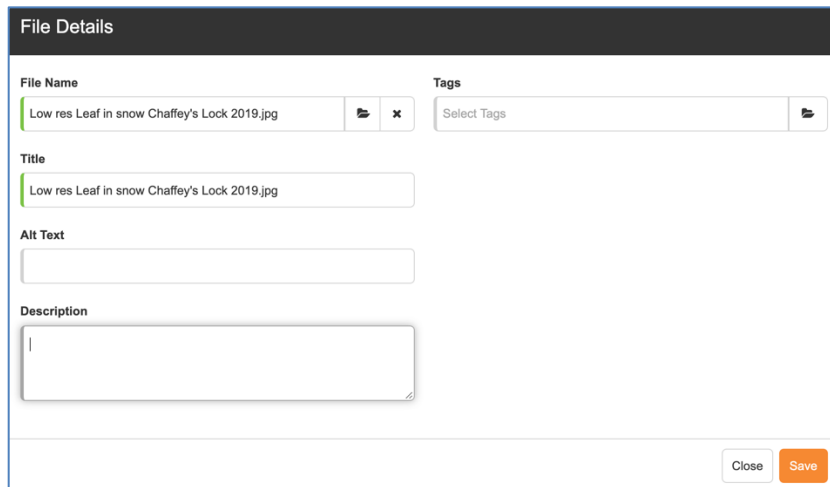
## Single Image

- If you choose Single Image, on the File Details page, in the File Name field, click the folder icon to browse for an image on your computer or device.



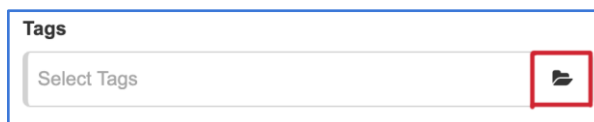
The screenshot shows a 'File Details' form with a 'File Name' field. The field contains the text 'Browse' and has a folder icon and an 'x' icon to its right. A red box highlights the folder icon.

- The name of the file is automatically populated as the Title of the photo.



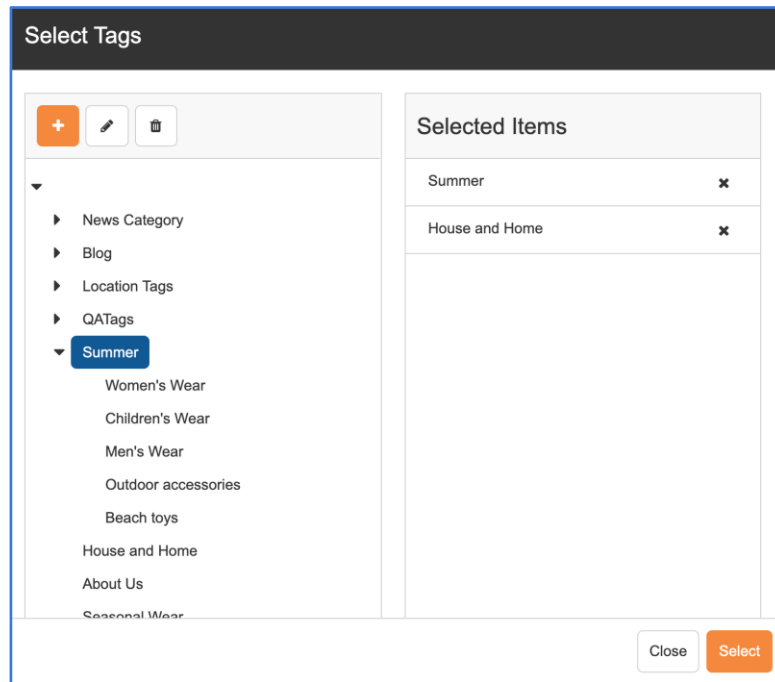
The screenshot shows the 'File Details' form with the following fields: 'File Name' (containing 'Low res Leaf in snow Chaffey's Lock 2019.jpg'), 'Tags' (containing 'Select Tags'), 'Title' (containing 'Low res Leaf in snow Chaffey's Lock 2019.jpg'), 'Alt Text' (empty), and 'Description' (empty). There are 'Close' and 'Save' buttons at the bottom right.

- Optionally, enter:
  - Alt Text
  - Description
- Optionally, in the Tags field, click the folder icon.

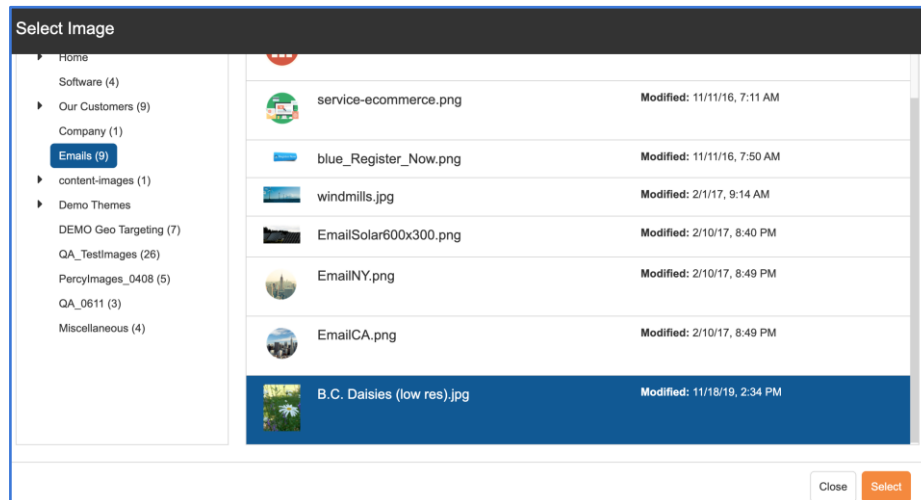


The screenshot shows the 'Tags' field with the text 'Select Tags' and a folder icon to its right. A red box highlights the folder icon.

- On the Select Tags page, select an item.
- In the Selected Items panel, click **Select**.



- On the File Details page, click **Save**.
- On the Select Image page, select the new image from the list.
- Click **Select**.



- Optionally in the Select Image dialog, enter:
  - Alt Text

- CSS Class
- Dimensions and Margins (in pixels).

### Select Image

**Type**  
Image Library

**Image Url**  
/Image Library/Emails/B.C.-Daisies--low-res-.jpg

**Alt Text**

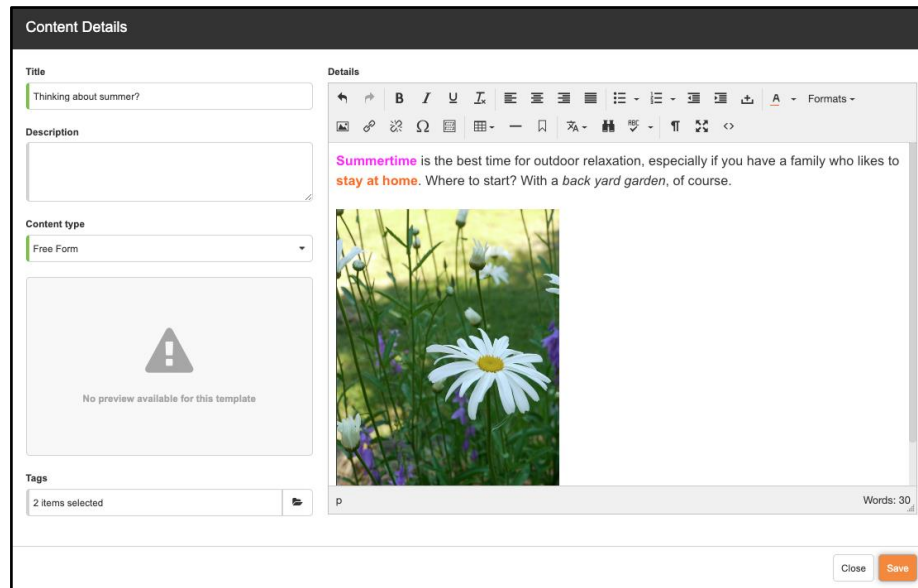
**CSS Class**

**Dimensions**  
width height  
*Original dimensions: 600x750*

**Margin (px)**  
top right bottom left

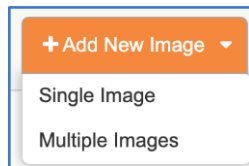
Close Insert Image

- Click Insert Image.

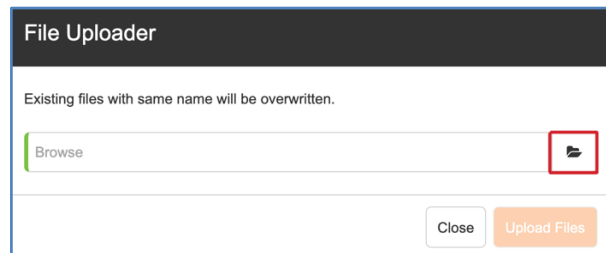


### Multiple Images

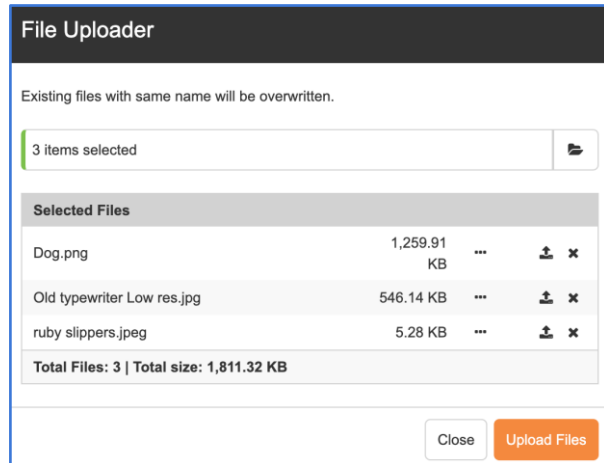
- If you want to upload Multiple Images, on the Select Image page, use the dropdown arrow beside Add New Image.



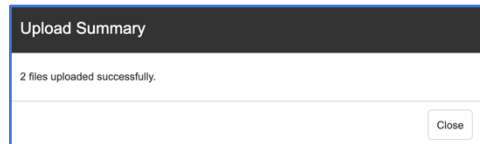
- Select Multiple Images.
- In the File Uploader dialog, click the folder icon to Browse for images in your files on your computer or device.



- In the File Uploader dialog, click **Upload Files**.



- Once the files have been uploaded, in the Upload Summary dialog, click **Close**.

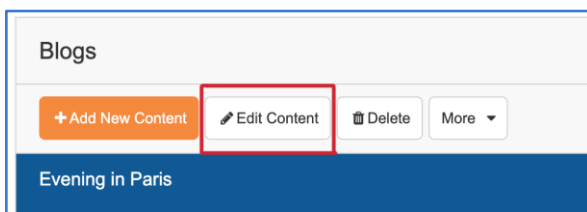


## Options

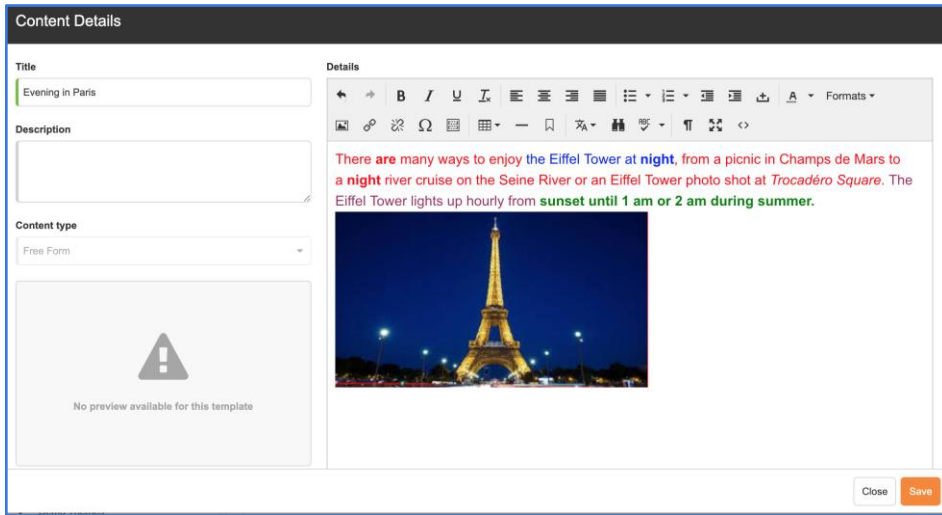
- Once your content is created, you can edit or delete it, or use the More menu for further options.

## Edit Content

- On the Content Items page, in the panel on the left, select a category. Select a content item from the list in the panel on the right.
- Click **Edit Content**.



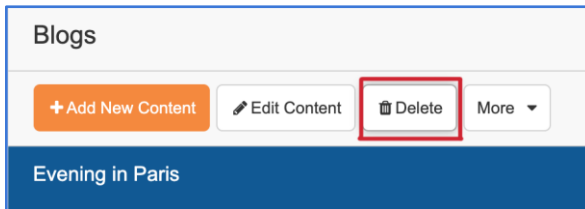
- On the Content Details page, make revisions or additions.



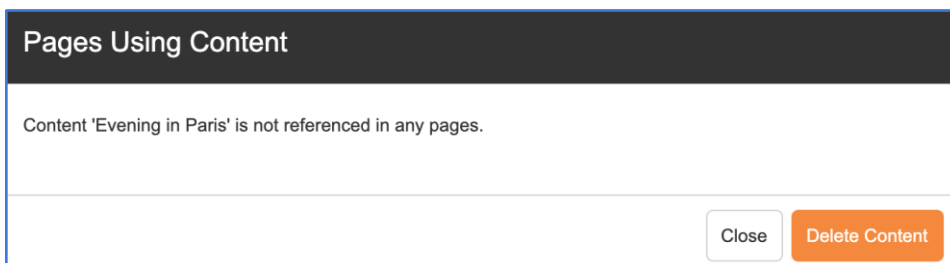
- Click **Save**.

### Delete Content

- On the Content Items page, in the panel on the left, select a category. Select a content item from the list in the panel on the right.
- Click **Delete**.



- If the page has not been referenced on a page or pages, in the Pages Using Content dialog, click **Delete Content**.



- If the page has been referenced on a page or pages, in the Pages Using Content dialog, see the notice about archiving content instead. Click **Close**.

### Pages Using Content

Content 'Body - Solution B' is referenced in following pages.

You cannot delete this content, try archiving the content instead

Page	Status
Solution B <a href="#">solutions/solution-b/solution-b</a>	Published
Solution B <a href="https://master.stage.demo.iapps.com/v7p2/solutions/solution-b/solution-b">https://master.stage.demo.iapps.com/v7p2/solutions/solution-b/solution-b</a>	Published

Close

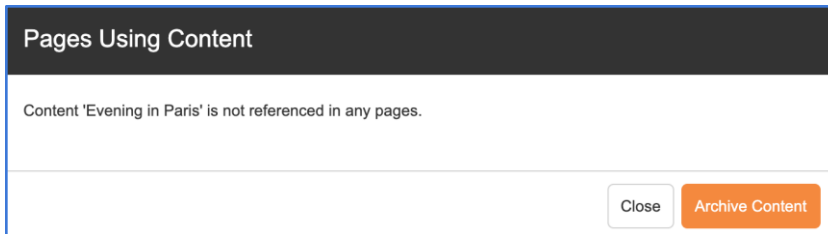
### More

- Using the More menu, you can:
  - Archive
  - Move Content
  - Assign Tags
  - View pages using this content
  - Submit for Translation
  - View Translation Status

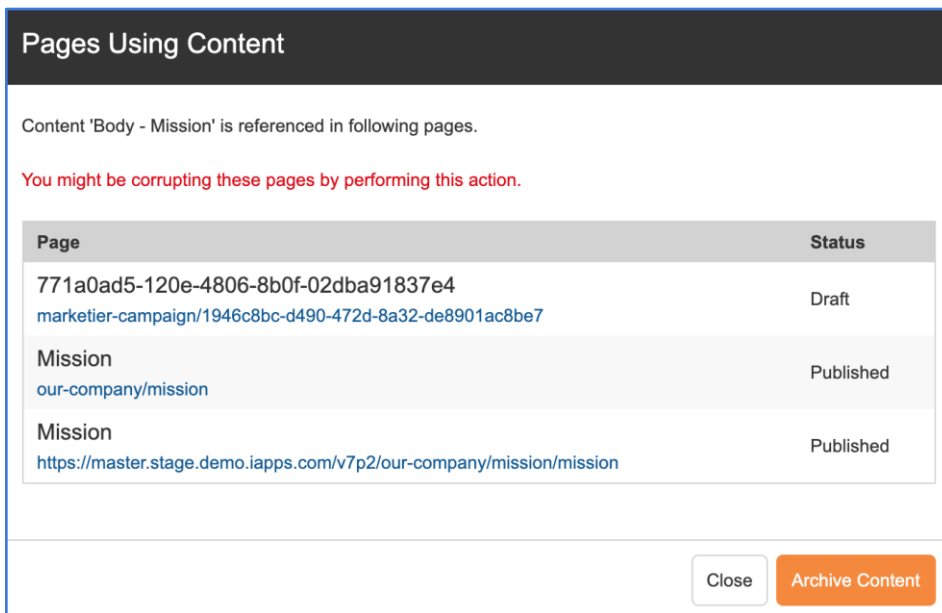
The screenshot shows a content management interface with a toolbar containing buttons for '+ Add New Content', 'Edit Content', 'Delete', and 'More'. The 'More' button is highlighted with a red box. Below the toolbar, a list of content items is shown: 'Body - Mission' (highlighted in blue), 'Body - Locations', and 'Location - Corporate'. The 'More' dropdown menu is open, displaying the following options: Archive, Move Content, Assign Tags, View pages using this content, Submit for Translation, and View Translation Status.

## Archive

- On the Content Items page, in the panel on the left, select a category. Select a content item from the list in the panel on the right.
- Using the More dropdown menu, select **Archive**.
- If the page has not been referenced on a page or pages, in the Pages Using Content dialog, click **Archive Content**.



- If the page has been referenced on a page or pages, in the Pages Using Content dialog, see the warning about the possibility of corrupting the pages.

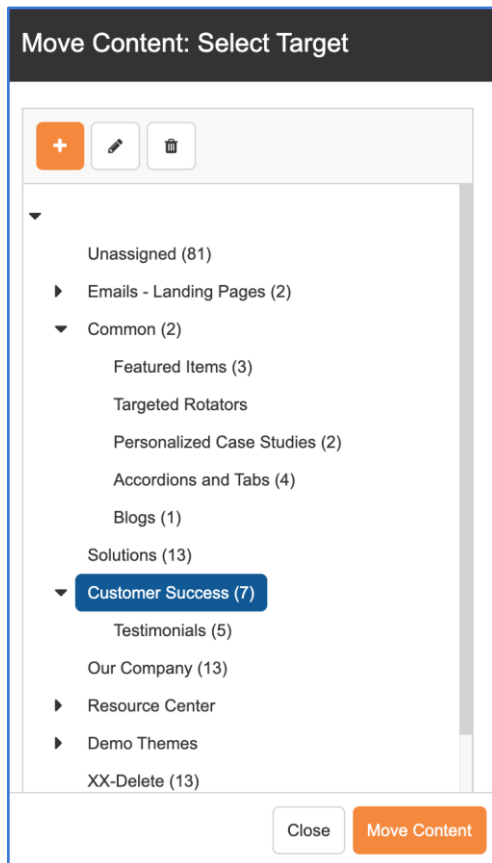


- Click **Archive Content** or **Close**.

## Move Content

- On the Content Items page, in the panel on the left, select a category. Select a content item from the list in the panel on the right.
- Using the More dropdown menu, select **Move Content**.

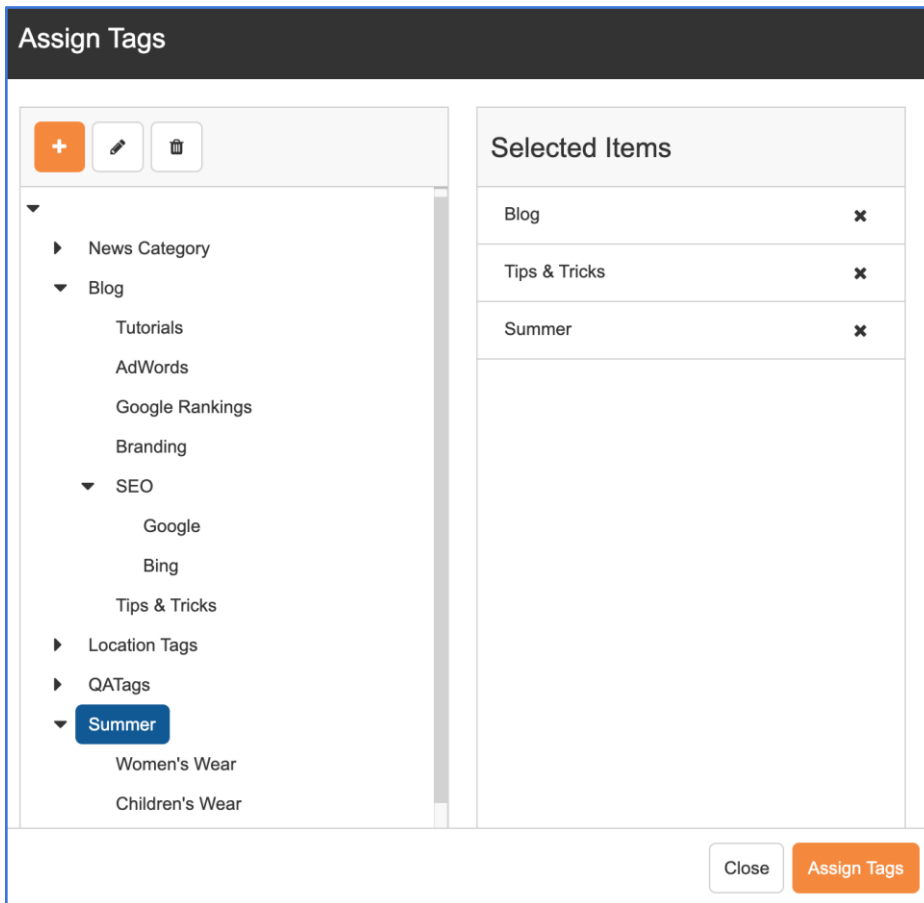
- In the Move Content: Select Target panel, select the category where you would like to move the content.



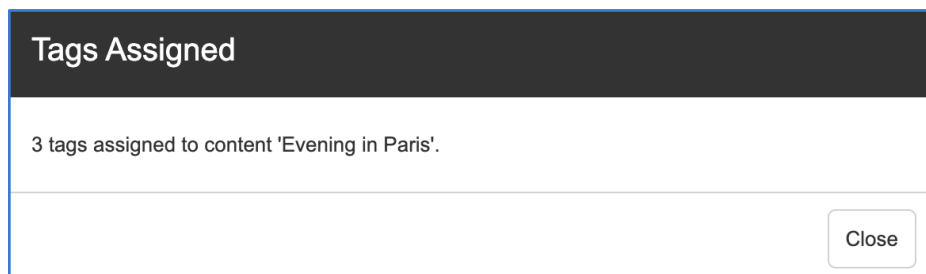
- Click **Move Content**.

#### Assign Tags

- On the Content Items page, in the panel on the left, select a category. Select a content item from the list in the panel on the right.
- Using the More dropdown menu, select **Assign Tags**.
- On the Assign Tags page, select a category from the panel on the left.



- In the Selected Items panel, click **Assign Tags**.
  - A dialog confirms this.



[View pages using this content](#)

- On the Content Items page, in the panel on the left, select a category. Select a content item from the list in the panel on the right.
- Using the More dropdown menu, select **View pages using this content**.
- In the Pages Using Content dialog, click **Close**.

**Pages Using Content**

Content 'Evening in Paris' is not referenced in any pages.

Close

**Pages Using Content**

Content 'Body - Solution B' is referenced in following pages.

Page	Status
Solution B <a href="solutions/solution-b/solution-b">solutions/solution-b/solution-b</a>	Published
Solution B <a href="https://master.stage.demo.iapps.com/v7p2/solutions/solution-b/solution-b">https://master.stage.demo.iapps.com/v7p2/solutions/solution-b/solution-b</a>	Published

Close

### Submit for Translation


- Optionally, using the More dropdown menu, select **Submit for Translation**.
- In the Submit for Translation dialog, in the Targets field, click the folder icon.

**Submit for Translation**

Select target(s) and submit to add to translation queue.

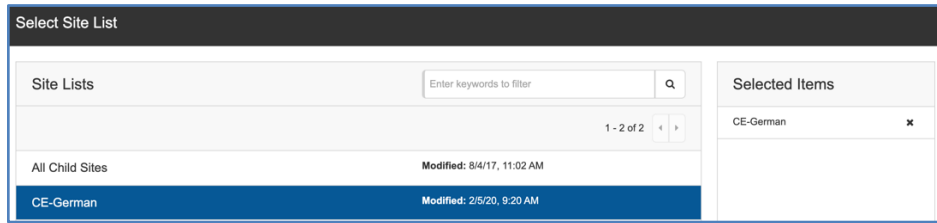
Document status can be tracked from 'Translation Activity' screen.

**Targets**

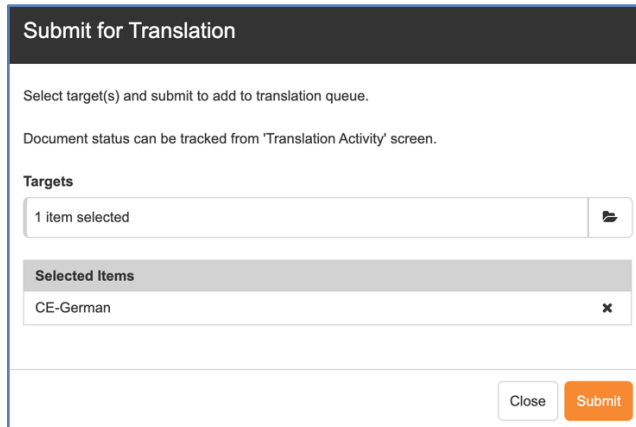
Select Site Lists 

Close Submit

- On the Select Site List page, select a site.
- In the Selected items panel on the right, click **Select**.



- In the Submit for Translation dialog, click **Submit**.



### View Translation Status

- Optionally, using the More dropdown menu, select View Translation Status.

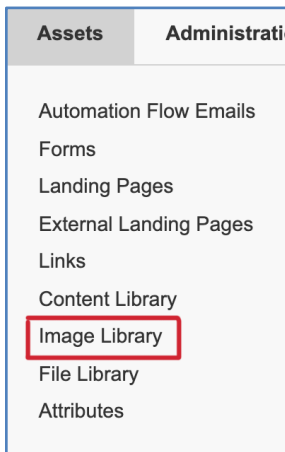
Site	Locale	Status	Submitted	Updated
CE-German	de-DE	Ready for translation	2/21/20, 9:53 PM	
France	fr-FR	Not translated		

## Image Library

Just as you need a central place to keep all your text, you also need to be able to store and access your images easily and quickly. This section shows you how to manage all your photos, illustrations, and videos so you can have them at your fingertips when you need them.

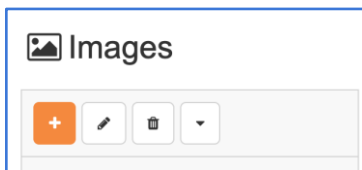
### Navigating your Image Library

- Under Assets, select **Image Library**.

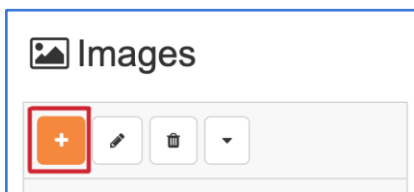


### Manage the Images Menu

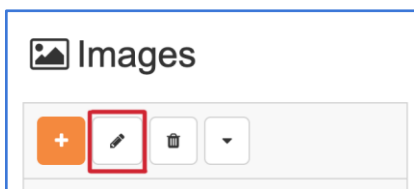
On the Images page, in the panel on the left, use the icons to select an action.



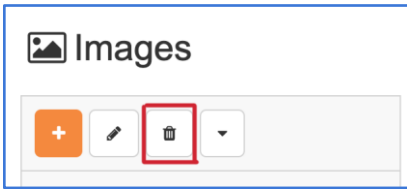
- Click the **Add** icon to add an image menu item.



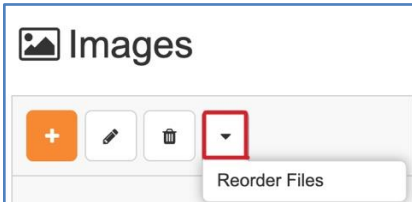
- Click the **Edit** icon to edit an image menu item.



- Click the **Delete** icon to edit an image menu item.

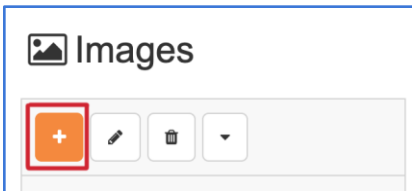


- Click the **arrow** to reorder files.



#### Add an Image menu

- On the Images page, in the panel on the left, select an image category.
- Click the **Add** icon.



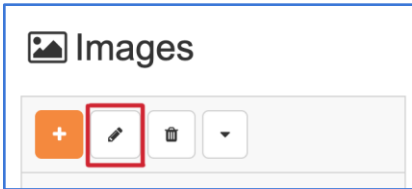
- In the Details dialog, enter a name.

- Optionally, add a description.
- Optionally, select the box beside Allow access in children sites.

- Click **Save**.

#### Edit an Image menu

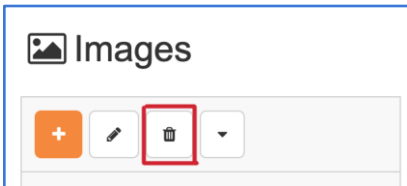
- On the Images page, in the panel on the left, select an image category.
- Click the **Edit** icon.



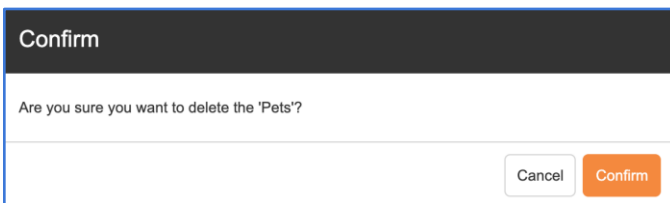
- In the Details dialog, revise your information.

#### Delete an Image menu

- On the Images page, in the panel on the left, select an image category.
- Click the **Delete** icon.

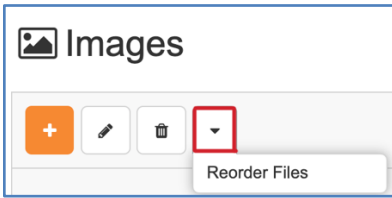


- In the Confirm dialog, click **Confirm**.

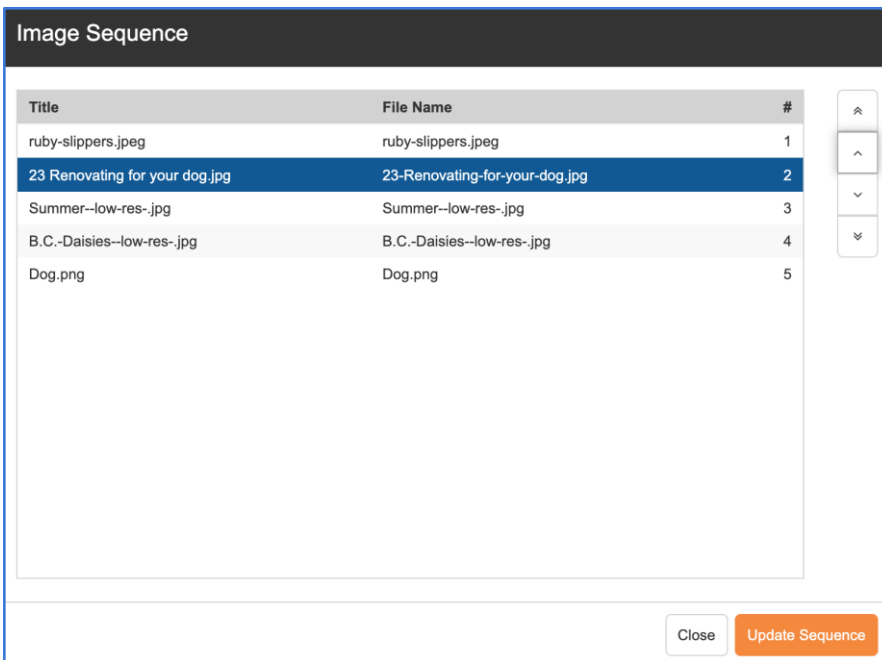


#### Reorder an Image menu

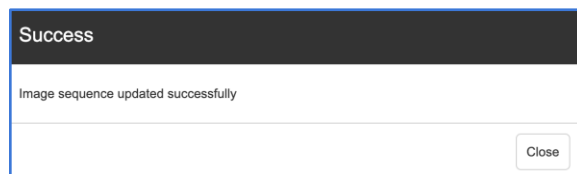
- On the Images page, in the panel on the left, select an image category.
- Using the dropdown arrow, select Reorder Files.



- On the Image Sequence page, use the arrows at the right to change the order of your image files.
- Click **Update Sequence**.

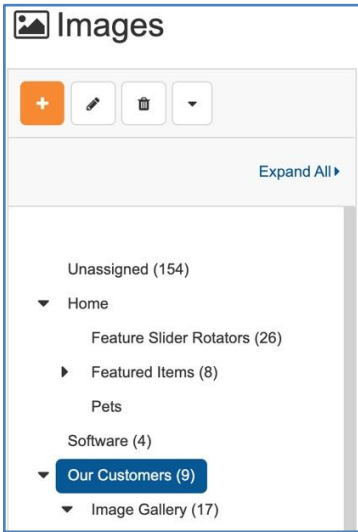


- This is confirmed by a Success dialog. Click **Close**.



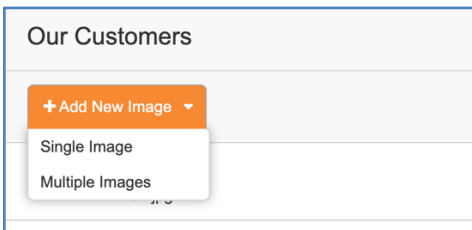
## Manage Images

- On the Images page, in the panel on the left, select a category.



## Add New Image

- In the panel on the right, use the dropdown arrow beside **Add New Image** to select Single Image or Multiple Images.



## Single Image

- If you choose Single Image, on the File Details page, in the File Name field, click the folder icon to browse for an image on your computer or device.



- The name of the file is automatically populated as the Title of the photo.

File Details

File Name: Low res Leaf in snow Chaffey's Lock 2019.jpg

Tags: Select Tags

Title: Low res Leaf in snow Chaffey's Lock 2019.jpg

Alt Text:

Description:

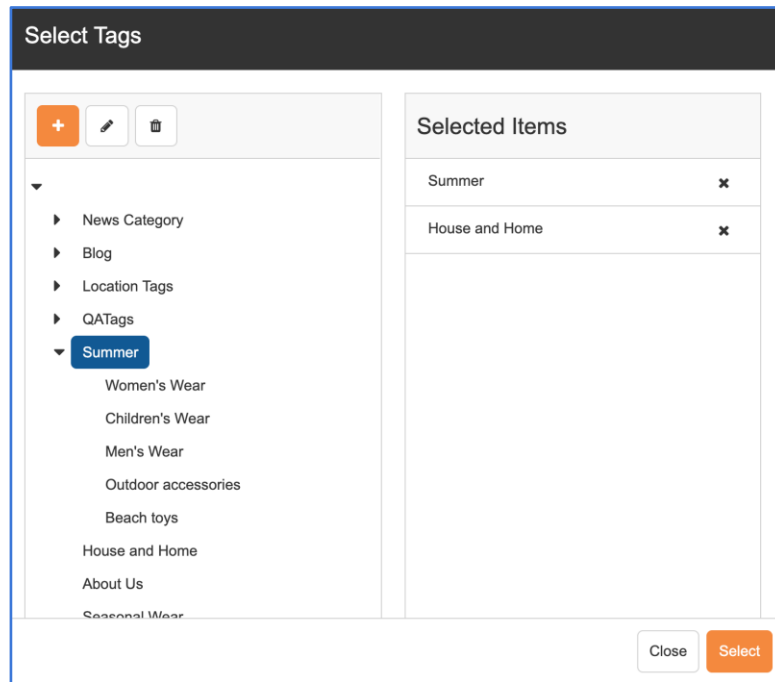
Close Save

- Optionally, enter:
  - Alt Text
  - Description
- Optionally, in the Tags field, click the folder icon.

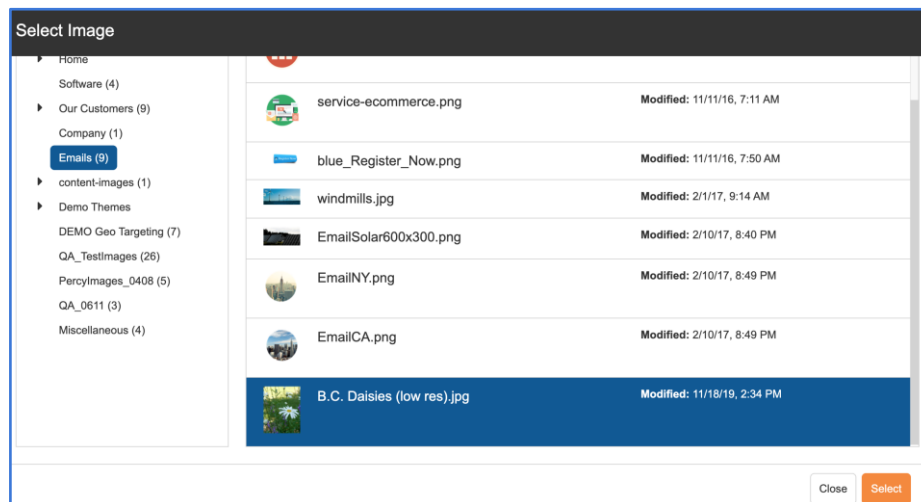
Tags

Select Tags

- On the Select Tags page, select an item.
- In the Selected Items panel, click **Select**.



- On the File Details page, click **Save**.
- On the Select Image page, select the new image from the list.
- Click **Select**.



- Optionally in the Select Image dialog, enter:
  - Alt Text

- CSS Class
- Dimensions and Margins (in pixels).

### Select Image

**Type**  
Image Library

**Image Url**  
/Image Library/Emails/B.C.-Daisies--low-res-.jpg

**Alt Text**

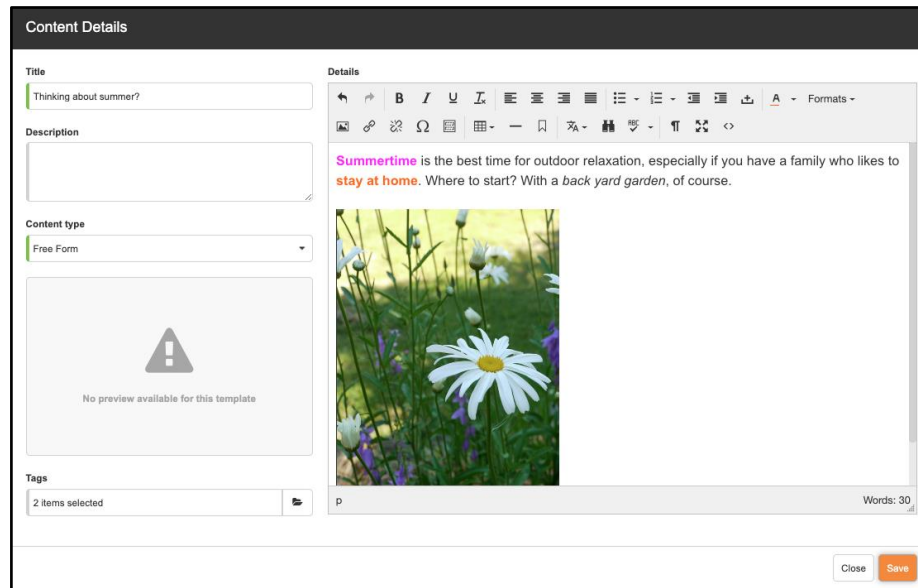
**CSS Class**

**Dimensions**  
width height  
*Original dimensions: 600x750*

**Margin (px)**  
top right bottom left

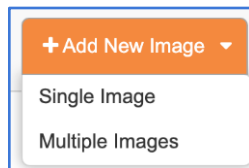
Close Insert Image

- Click Insert Image.



### Multiple Images

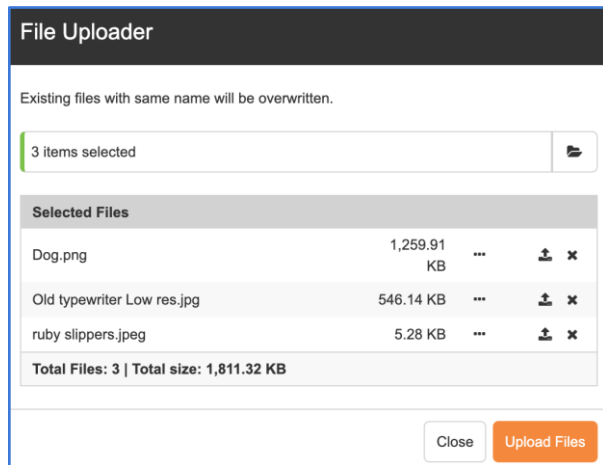
- If you want to upload Multiple Images, on the Select Image page, use the dropdown arrow beside **Add New Image**.



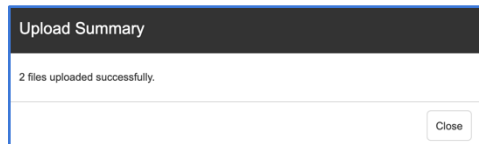
- Select **Multiple Images**.
- In the File Uploader dialog, click the folder icon to Browse for images in your files on your computer or device.



- In the File Uploader dialog, click **Upload Files**.

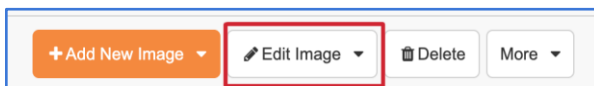


- Once the files have been uploaded, in the Upload Summary dialog, click **Close**.

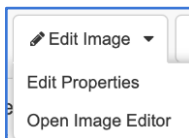


### Edit an Image

- In the panel on the left, select a category.
- In the panel on the right, select the image you would like to edit.
- Click **Edit Image**.

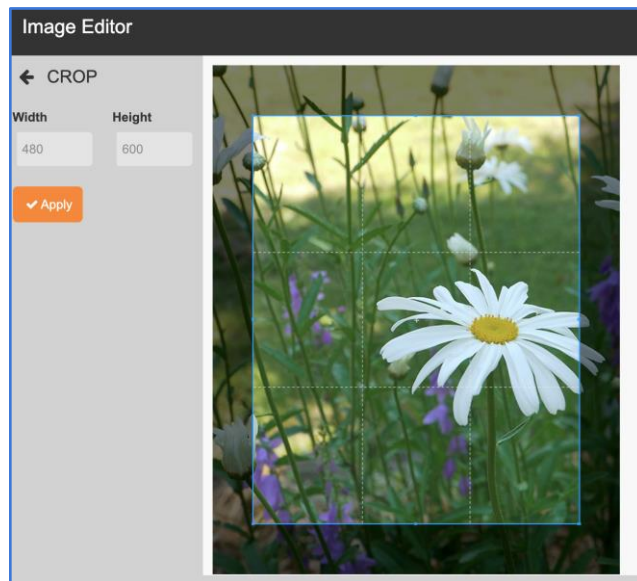
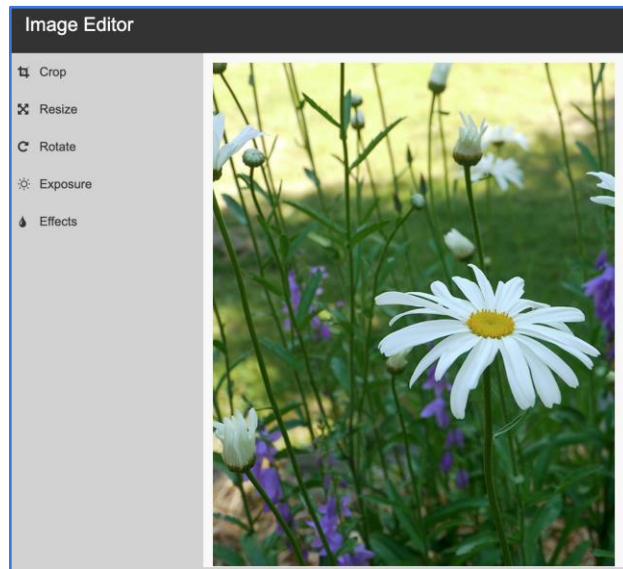


- Using the dropdown arrow beside Edit Image, select Edit Properties or Open Image Editor.



- If you select Edit Properties, on the File Details page, make any revisions.
- Click **Save**.
- If you select Open Image Editor, on the Image Editor page, use the image-editing features:
  - Crop

- Resize
- Rotate
- Exposure
- Effects

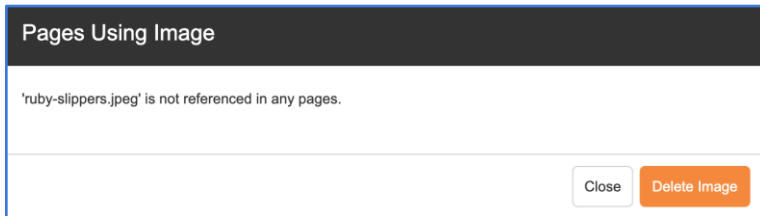


- When you have made your edits, click **Save As** or **Save**.
  - Optionally, you can click **Undo** or **Redo** for any edit.

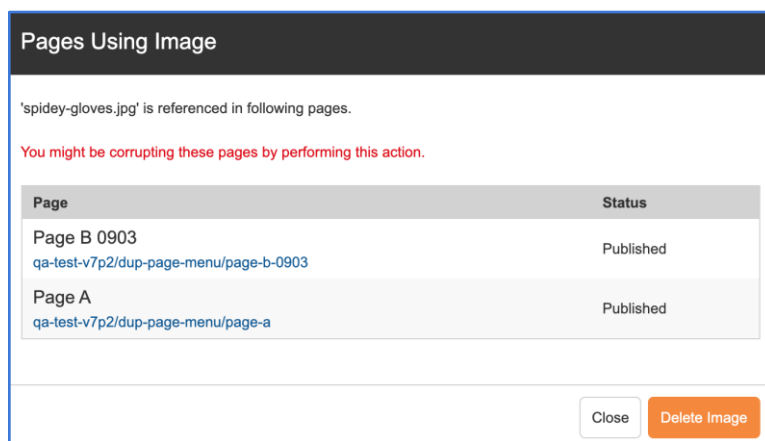
#### Delete an image

- On the Images page, in the panel on the left, select a category.
- In the panel on the right, select the image you would like to delete.

- Click Delete.
- If your image is not referenced on any pages, click **Delete Image**.

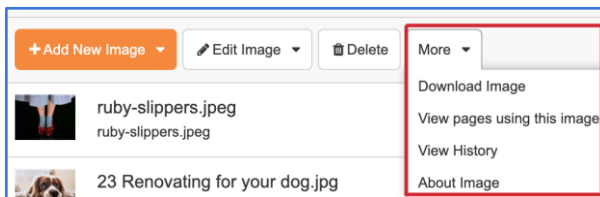


- If your image is referenced on pages, you will see this warning.



### Use the More menu

- Use the More dropdown menu to select further actions.



### Download Image

- To download an image to your device, select **Download Image**.

### View pages using this image

- Select **View pages using this image** to see where the image is being referenced.

**Pages Using Image**



'experience-banner.gif' is referenced in following pages.

Page	Status
Sample Modules <a href="resource-center/sample-modules/sample-modules">resource-center/sample-modules/sample-modules</a>	Published

Close

### View History

- Select an image. Select **View History**.

	Summer--low-res-.jpg Summer--low-res-.jpg
	B.C.-Daisies--low-res-.jpg B.C.-Daisies--low-res-.jpg

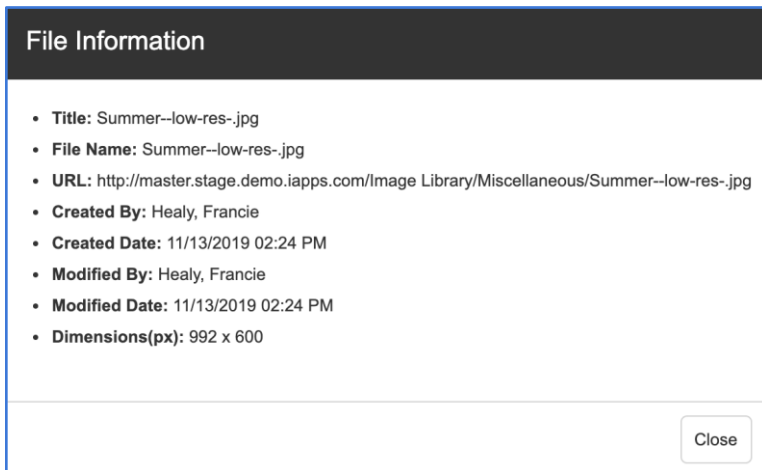
**Image History**

1 - 1 of 1

<b>Version:</b> 1.0	<b>Updated:</b> 11/13/19, 2:24 PM by Healy, Francie <b>File Size:</b> 288.66 KB
---------------------	--

### About Image

- To view data in regard to an image, choose the image and select **About Image**.

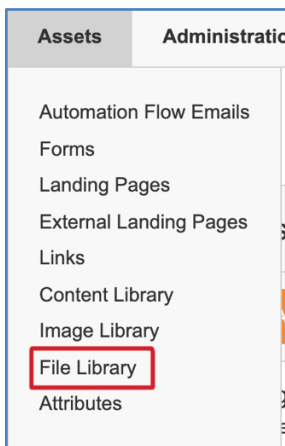


## File Library

Files are something you need to access when you need them – quickly and without fuss. This section shows you how to store and organize your files simply so you can always access them at any given moment.

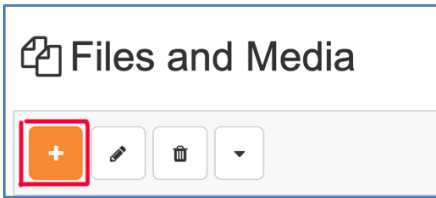
### Navigating your File Library

- Under Assets, select File Library.

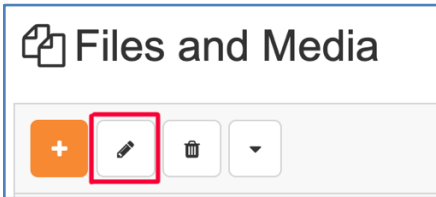


### Manage file categories

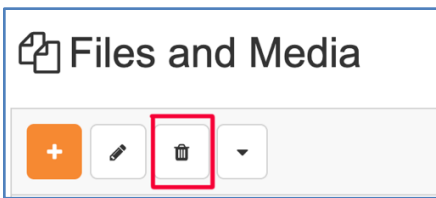
- On the Files and Media page, click the **Add** icon to add a Files and Media menu item.



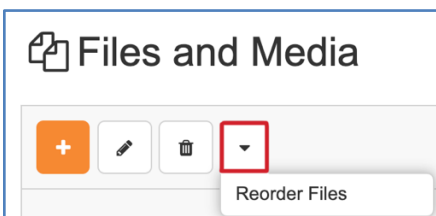
- Click the **Edit** icon to edit a Files and Media menu item.



- Click the **Delete** icon to delete an image menu item.

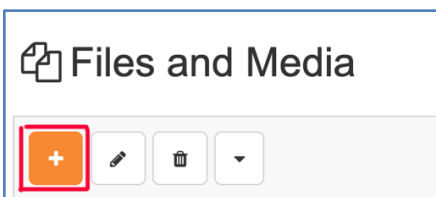


- Click the dropdown **arrow** to Reorder Files.

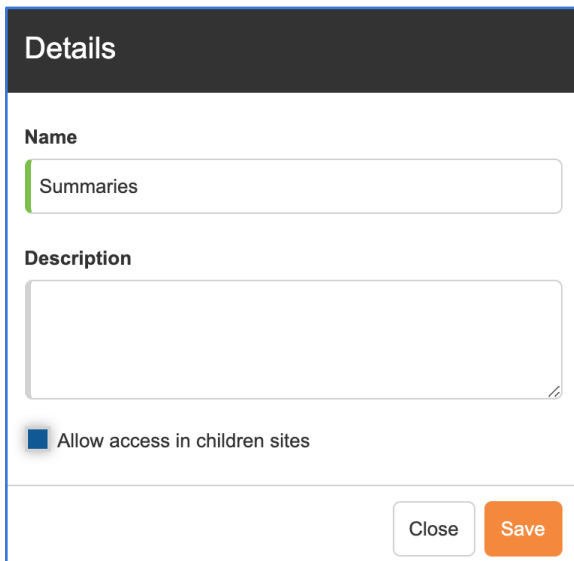


### Add a Files and Media category

- On the Files and Media page, in the panel on the left, select a category.
- Click the **Add** icon.



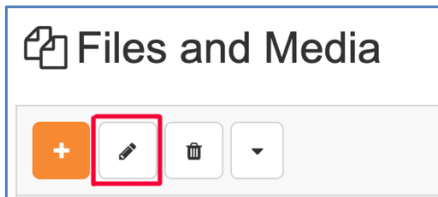
- In the Details dialog, enter a name.



- Optionally, add a description.
- Optionally, select the box beside Allow access in children sites.
- Click **Save**.

#### Edit a Files and Media category

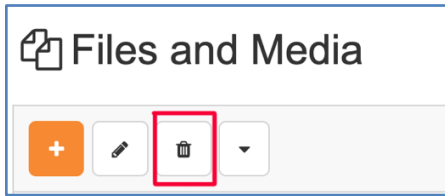
- On the Files and Media page, in the panel on the left, select a category.
- Click the **Edit** icon.



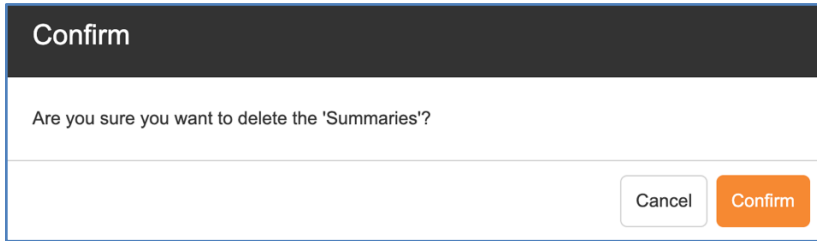
- In the Details dialog, revise your information.

#### Delete a Files and Media category

- On the Files and Media page, in the panel on the left, select a category.
- Click the **Delete** icon.

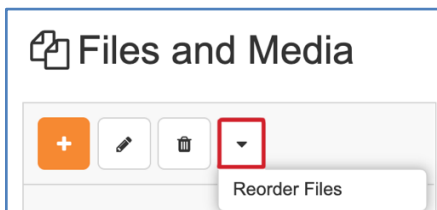


- In the Confirm dialog, click **Confirm**.

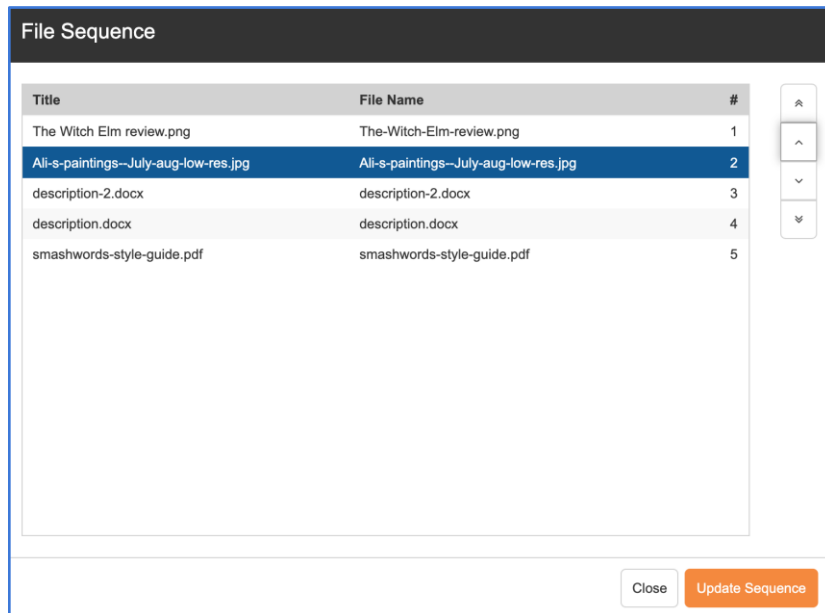


### Other options

- On the Files and Media page, in the panel on the left, select a category.
- Use the dropdown arrow to select Reorder Files.



- On the Image Sequence page, use the arrows at the right to change the order of your files.

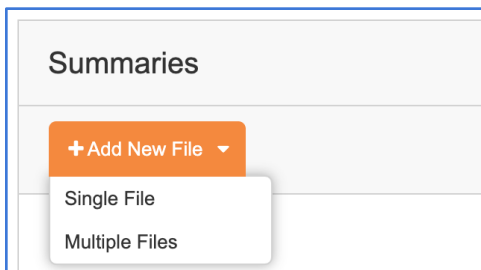


- Click **Update Sequence**.
  - This is confirmed by a Success dialog. Click **Close**.

### Manage your files

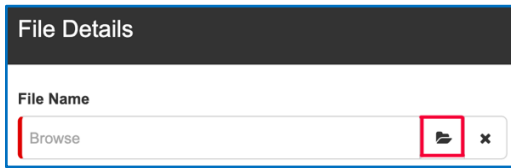
#### Add a file

- On the Files and Media page, in the panel on the left, select a category.
- In the panel on the right, click **Add New File**. Use the dropdown menu to choose Single File or Multiple Files.



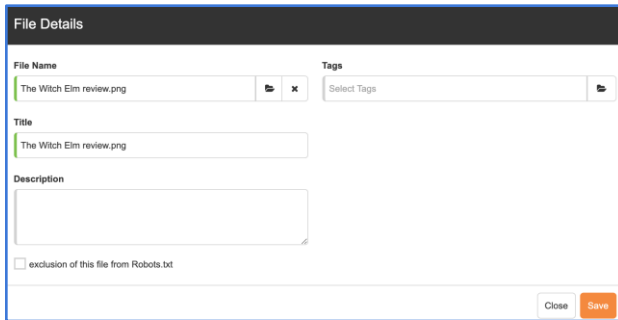
## Single file

- If you choose **Single File**, on the File Details page, in the File Name field, click the folder icon to browse for a file on your computer or device.



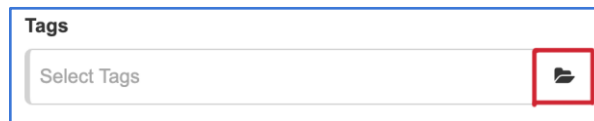
The screenshot shows a 'File Details' form. The 'File Name' field contains the text 'Browse' and a folder icon. A red box highlights the folder icon.

- The name of the file is automatically populated as the Title.



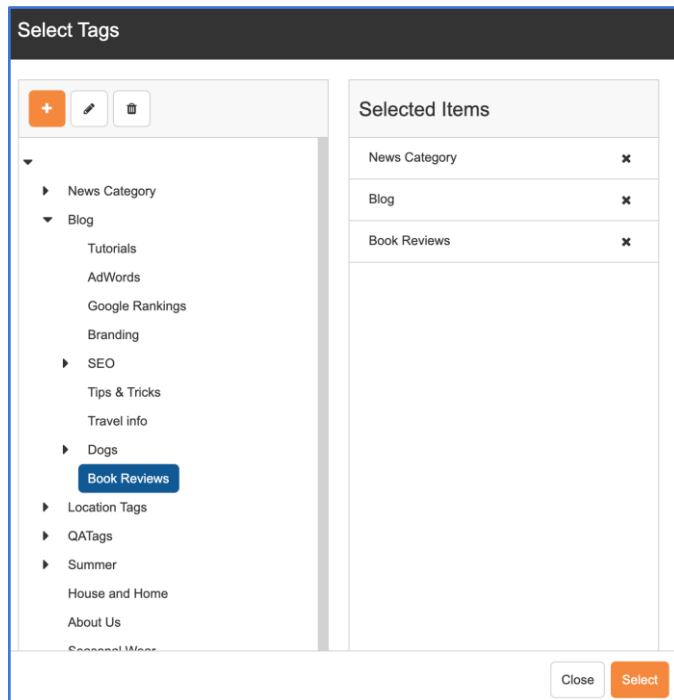
The screenshot shows the 'File Details' form with the following fields: 'File Name' (The Witch Elm review.png), 'Tags' (Select Tags), 'Title' (The Witch Elm review.png), and 'Description' (empty). There is also a checkbox for 'exclusion of this file from Robots.txt' and 'Close' and 'Save' buttons.

- Optionally, enter Alt Text.
- Optionally, enter a description.
- Optionally, in the Tags field, click the folder icon.



The screenshot shows the 'Tags' field with the text 'Select Tags' and a folder icon. A red box highlights the folder icon.

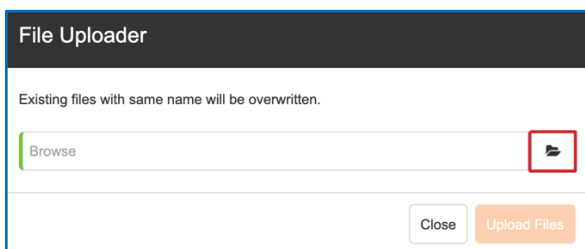
- On the Select Tags page, select a category in the menu panel.
- In the Selected Items panel, click **Select**.



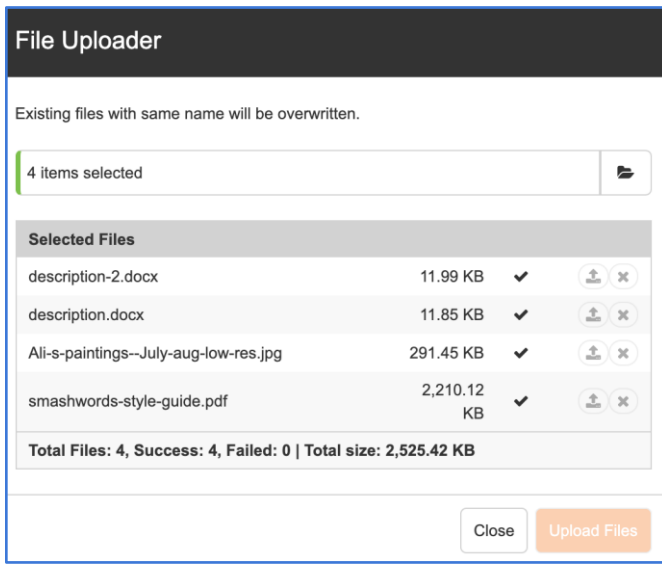
- On the File Details page, click **Save**.

### Multiple files

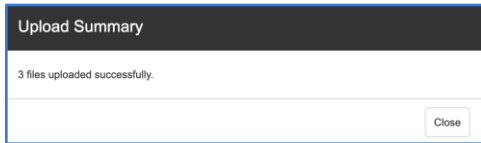
- If you choose **Multiple** files, in the File Uploader dialog, click the folder icon to Browse for your files.



- Click **Upload Files**.



- Once the files have been uploaded, in the Upload Summary dialog, click **Close**.



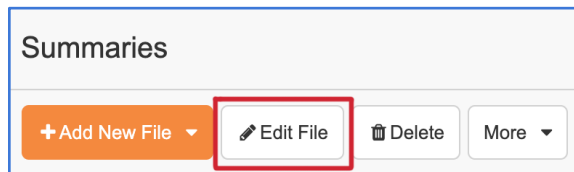
- Optionally in the File Uploader dialog, use the folder icon to choose more images.
- Click **Close**.

### File options

- On the Files and Media page, in the panel on the left, select a category. Select a file from the list in the panel on the right.

#### Edit a file

- Optionally, from the icons at the top of the list, click **Edit File**.



- On the File Details page, make any revisions. Click **Save**.

**File Details**

**File Name**  
 smashwords-style-guide.pdf

**Tags**  
 Select Tags

**Title**  
 smashwords-style-guide.pdf

**Description**

exclusion of this file from Robots.txt

Close Save

### Delete a file

- Optionally, from the icons at the top of the list, click **Delete**.

**Summaries**

+ Add New File Edit File Delete More

- In the Pages Using File dialog, click **Delete File**.

**Pages Using File**

'smashwords-style-guide.pdf' is not referenced in any pages.

Close Delete File

- If the file you want to delete is referenced in a page or pages, you will see a warning.

### Pages Using File

'esl-casestudy-2016.pdf' is referenced in following pages.

You might be corrupting these pages by performing this action.

Page	Status
Case Studies <a href="#">customer-success/case-studies/case-studies</a>	Published

Close Delete File

### More Options

- Optionally, from the icons at the top of the list, use the More dropdown menu to make a further selection.

### Summaries

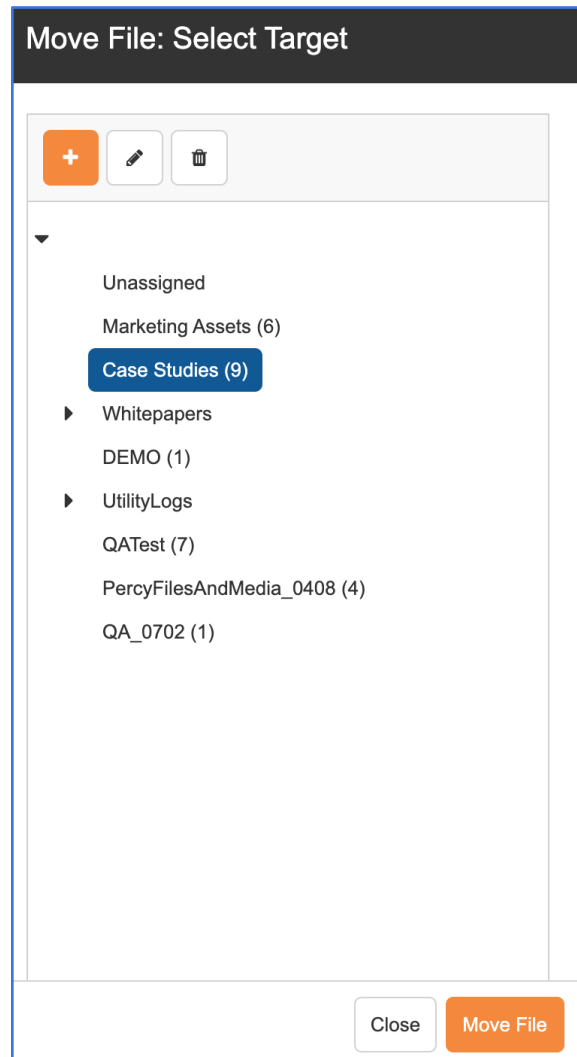
+ Add New File Edit File Delete More

- The Witch Elm review.png  
The-Witch-Elm-review.png
- Ali-s-paintings--July-aug-low-res.jpg  
Ali-s-paintings--July-aug-low-res.jpg

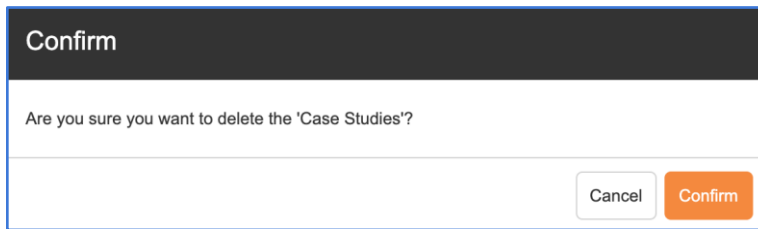
Move File  
Download File  
View pages using this file  
View History  
About File

### Move File

- To move a selected file, select **Move File**.
- In the Move File: Select Target dialog, choose where you would like to move the file.



- Click **Move File**.
  - Optionally, in the Move File: Select Target dialog, you can use the icons at the top to **add**, **edit** or **delete** a category (target).
  - If you want to add or edit a target, in the Details dialog, name the new target or make a revision.
  - If you want to delete a target, in the Confirm dialog, click **Confirm**.

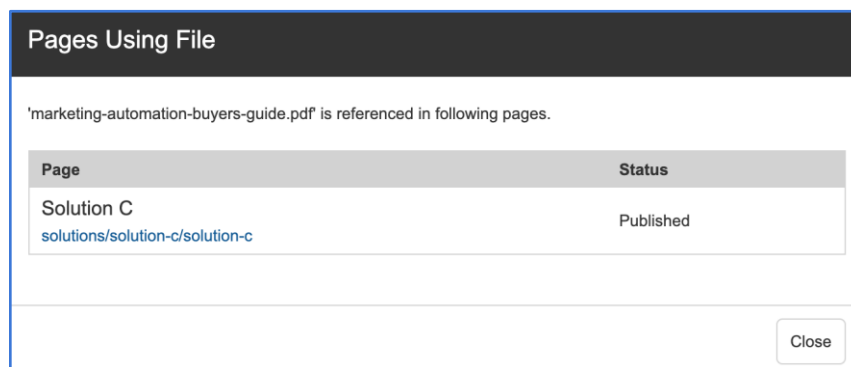


### Download file

- To download a file, select **Download File**.
- Choose the location on your device.

### View pages using this file

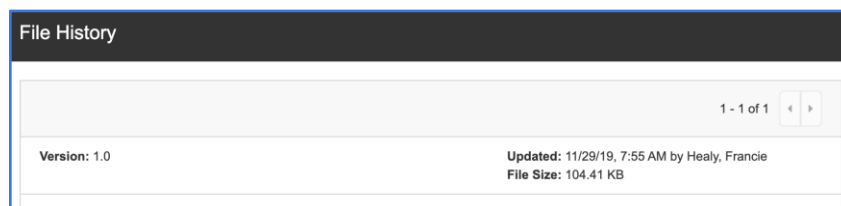
- To see the pages where your file is referenced, select **View pages using this file**.



- Click **Close**.

### View History

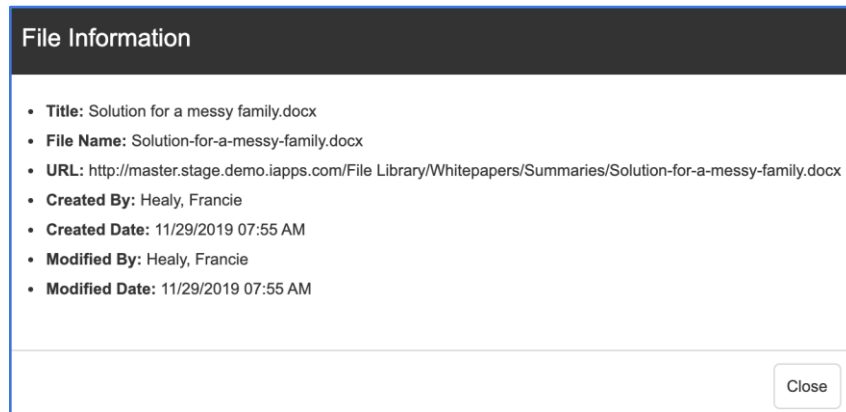
- To see the version history of your file, select **View History**.



- Click **Close**.

## About File

- To see information about your file, select **About File**.



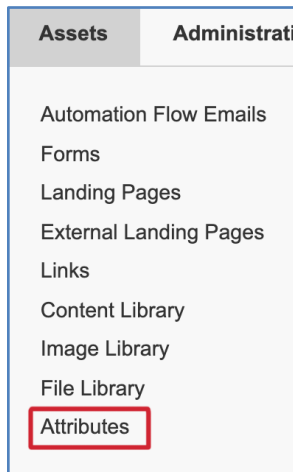
- Click **Close**.

## Attributes

Attributes and characteristics are essential to your users' ease-of-use as well as to design and performance of your site. Create, edit, organize and store all your attributes for every part of your online presence and activity.

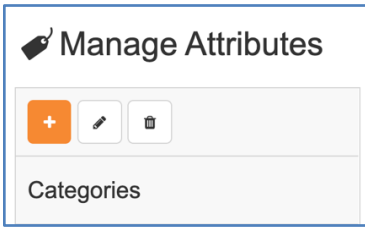
### Navigating Attributes

- Under Assets, select Attributes.

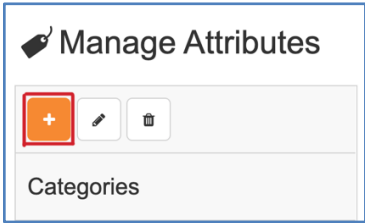


### Manage Attribute categories

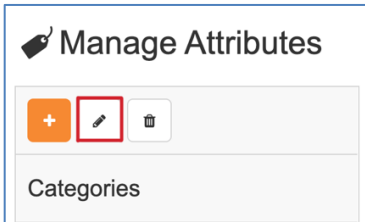
- On the Manage Attributes page, in the panel on the left, use the icons to select an Attribute category.



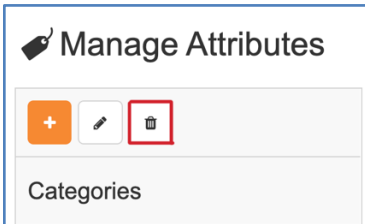
- Click the **Add** icon to add an Attribute category.



- Click the **Edit** icon to edit an Attribute category.

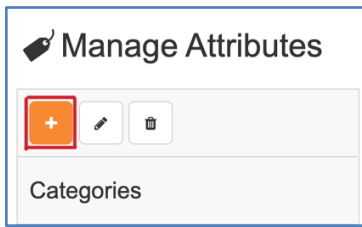


- Click the **Delete** icon to delete an Attribute category.



#### [Add an Attribute category](#)

- On the Manage Attributes page, in the panel on the left, select an Attribute category.
- Click the **Add** icon.

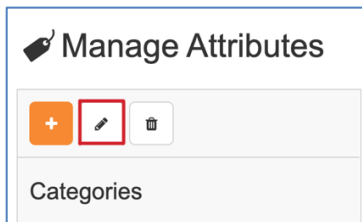


- In the Details dialog, enter a name.

- Optionally, enter a description.

#### [Edit an Attribute category](#)

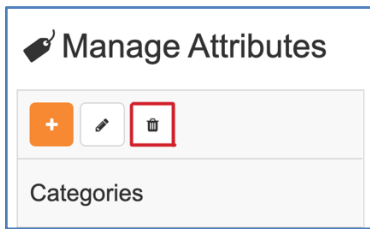
- On the Manage Attributes page, in the panel on the left, select an Attribute category.
- Click the **Edit** icon.



- In the Details dialog, revise your information.

#### [Delete an Attribute category](#)

- On the Manage Attributes page, in the panel on the left, select an Attribute category.
- Click the **Delete** icon.



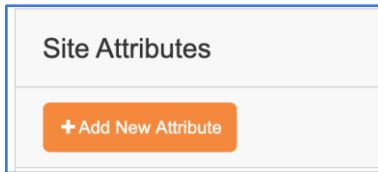
- In the Confirm dialog, click **Confirm**.

### Manage Attributes

On the Manage Attributes page, in the panel on the left, select a category.

### Add an Attribute

- In the panel on the right, click **Add New Attribute**.



- On the Attribute Details page, in the Key field, enter the information.
- In the Title field, enter a title.


**Attribute Details**

**Key**

**Title**

**Description**

**Code**

**Categories**  
 

**Options**

- Faceted
- Searchable
- Personalizable
- Enable value translation

**Details**

**Type**  
String

**Validation**  
- Select -

Allow multiple values

Close Save

- Optionally, in the Description field, enter a description.
- Optionally, in the Code field, enter the information.
- Optionally, in the Categories field, click the folder icon.
  - On the Select Categories page, under Attribute Categories, select an Attribute category or categories.
  - In the Selected Items panel on the right, click **Select**.

**Select Categories**

**Attribute Categories**

1 - 10 of 20

Site Attributes	Modified: 1/25/19, 1:44 PM
Page Attributes	Modified: 1/25/19, 1:44 PM
Contact Attributes	Modified: 1/25/19, 1:44 PM
Customer Attributes	Modified: 2/9/16, 6:14 PM
Order Attributes	Modified: 2/9/16, 6:14 PM
Order Item	Modified: 1/25/19, 1:44 PM
Product Info Tabs	Modified: 2/19/16, 11:11 AM
Specification	Modified: 2/19/16, 11:14 AM

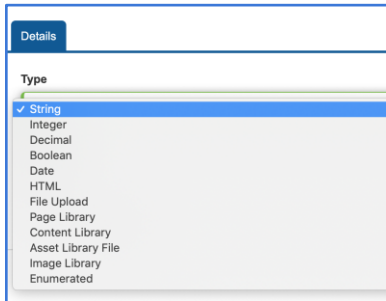
**Selected Items**

- Site Attributes
- Page Attributes
- Social
- Customer Attributes

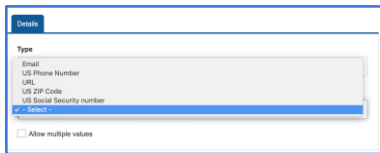
Close Select

- Optionally, under Options, select check boxes beside:

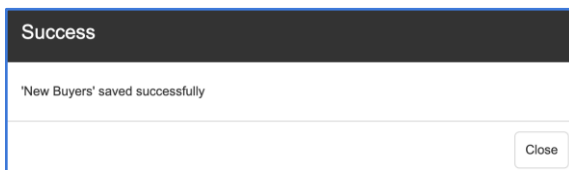
- Faceted
  - Searchable
  - Personalizable
  - Enable value translation
- Under the Details tab, in the Type field, use the arrow to select from the dropdown menu.



- Optionally, in the Validation field, use the arrow to select from the dropdown menu.

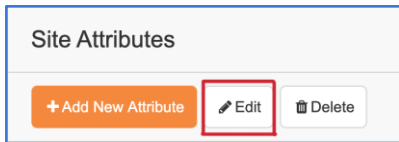


- Optionally, select the check box beside Allow multiple values.
- On the Attribute Details page, click **Save**.



### Edit an Attribute

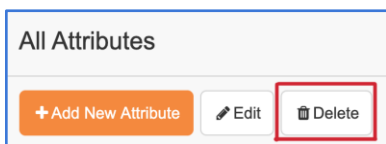
- On the Manage Attributes page, in the panel on the left, select a category.
- In the panel on the right, click **Edit**.



- On the Attribute Details page, make any revisions.
- Click **Save**.

### Delete an Attribute

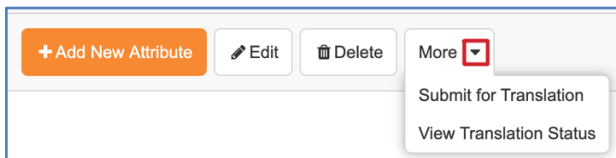
- On the Manage Attributes page, in the panel on the left, select a category.
- In the panel on the right, click **Delete**.



- In the Confirm dialog, click **Confirm**.

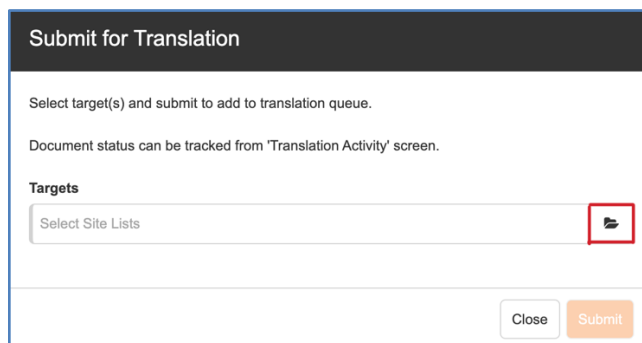
### More Attribute options

- On the Manage Attributes page, in the panel on the left, select a category.
- In the panel on the right, click the More dropdown menu to select Submit for Translation or View Translation Status.

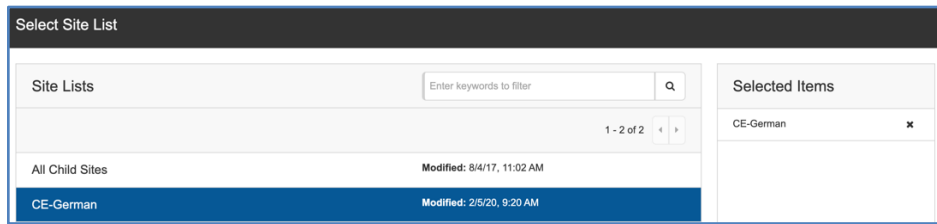


### Submit for Translation

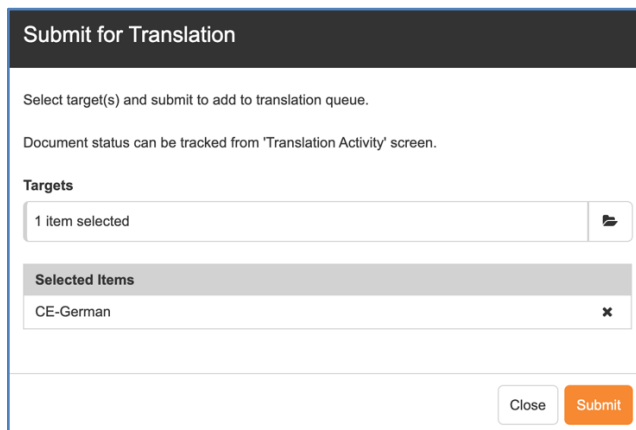
- In the Submit for Translation dialog, in the Targets field, click the folder icon.



- On the Select Site List page, select a site.
- In the Selected items panel on the right, click **Select**.



- In the Submit for Translation dialog, click **Submit**.



### View Translation Status

- To see the status of your translation(s), using the More dropdown menu, select View Translation Status.

The screenshot shows the 'Translation Status' table. It has a header row with columns: Site, Locale, Status, Submitted, and Updated. The table contains two rows of data:

Site	Locale	Status	Submitted	Updated
CE-German	de-DE	Ready for translation	2/21/20, 9:53 PM	
France	fr-FR	Not translated		

## Administration

Good administration means having good tools you can rely on, simple access, and superb organization. The Unbound product suite helps Administrators keep your site or sites secure, manageable and functional at all times.

- Under **Administration**, there are two sections. Choose an item from **Users & Groups** or **Site Functions**.

• Administration	
<b><u>Users &amp; Groups</u></b>	<b><u>Site Functions</u></b>
Marketing Groups	Manage Sites
Marketing Users	Manage Site Lists
	Distribution Activity
	Legacy Autoresponders

## Administration – Users & Groups

### Marketing Groups

Manage your marketing groups or add new groups.

- Under Administration – Users & Groups, select Marketing Groups.

Administration	For Developers
<b>Users &amp; Groups</b>	<b>Site Functions</b>
<b>Marketing Groups</b>	Manage Sites
Marketing Users	Manage Site Lists
	Distribution Activity
	Legacy Autoresponders

On the Marketing Groups page, use the search bar to filter groups, or use the Status, Sort or Show menus.

Enter keywords to filter

Status ▾ Sort ▾ Show ▾ 1 - 50 of 80

Status ▾	Sort ▾	Show ▾
All Statuses	Group Name	10
Active	Created Date	20
InActive	Modified Date	50

### Add a new Marketing Group

- On the Marketing Groups page, click **Add New Group**.

Marketing Groups

- On the Group Details page, enter a title of the new Group.

**Group Details**

**Title**

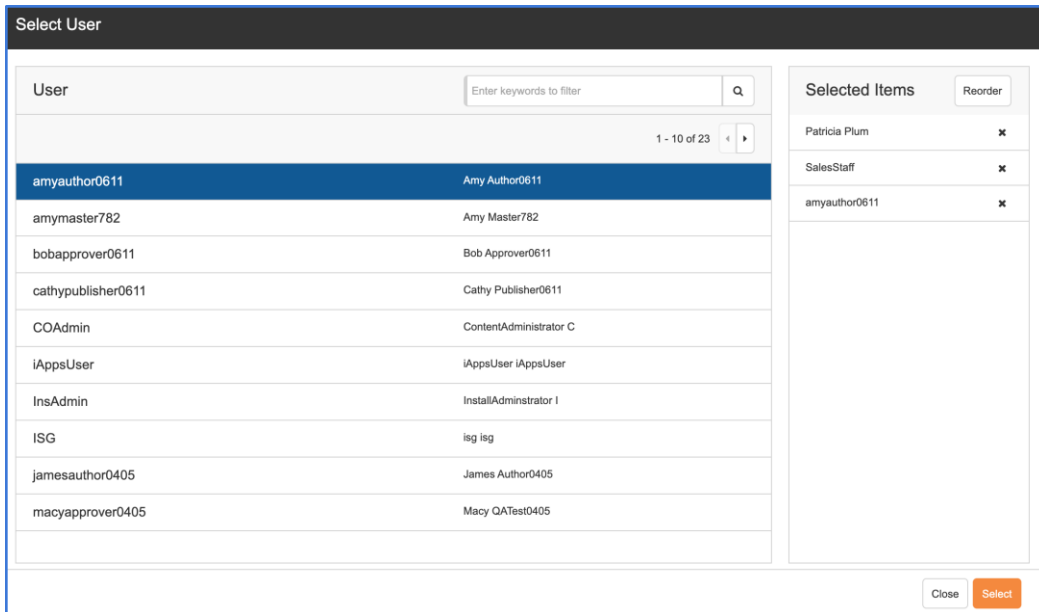
**Description**

**Users**

- Optionally, enter a Description.
- In the Users field, click the folder icon.

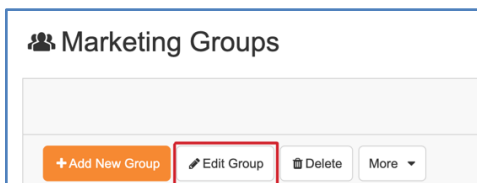
**Users**

- On the Select User page, select the users for your group.
- In the Selected Items panel, click **Select**.



### Edit a Marketing Group

- On the Marketing Groups page, select a group from the list.
- Click **Edit Group**.

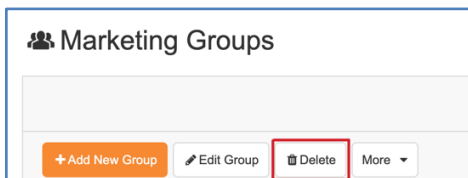


- On the Group Details page, make any revisions.

- Click **Save**.

### Delete a Marketing Group

- On the Marketing Groups page, select a group from the list.
- Click **Delete**.

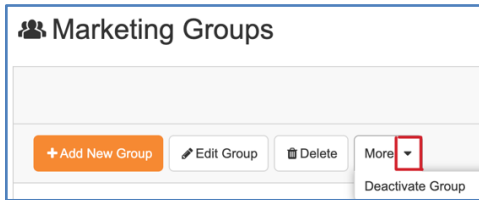


- In the Confirm dialog, click **Confirm**.

### Activate/Deactivate Marketing Group

- On the Marketing Groups page, select a group from the list.

- Using the More dropdown arrow, choose **Deactivate Group**. (Alternately, choose **Activate Group**.)

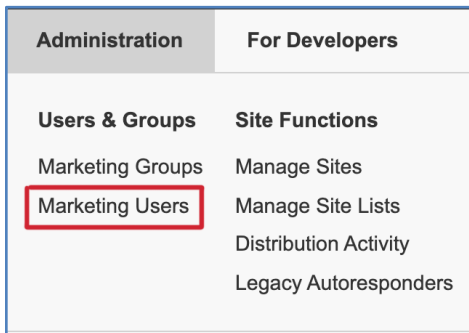


## Administration – Users & Groups *(Continued)*

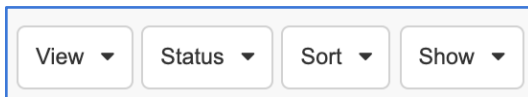
### Marketing Users

Manage your marketing users or add new users.

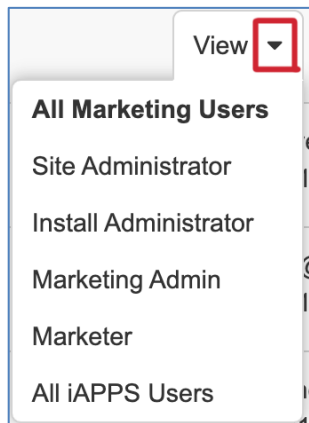
- Under Administration - Users & Groups, select Content Users.



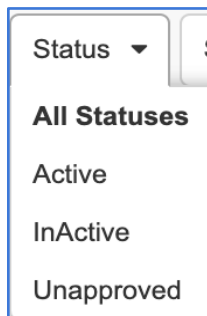
- Optionally, on the Marketing Users page, use the search bar to filter groups, or use the View, Status, Sort or Show menus.



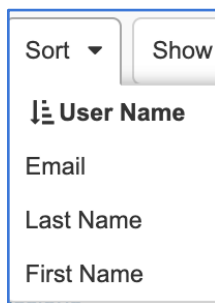
- Using the View dropdown menu, filter by
- All Marketing Users
  - Site Administrator
  - Install Administrator
  - Marketing Admin
  - Marketer
  - All iAPPS User



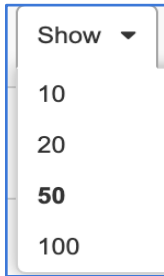
- Using the Status dropdown menu, filter by
- All Statuses
  - Active
  - InActive
  - Unapproved



- Using the Sort dropdown menu, filter by
  - User Name
  - Email
  - Last Name
  - First Name

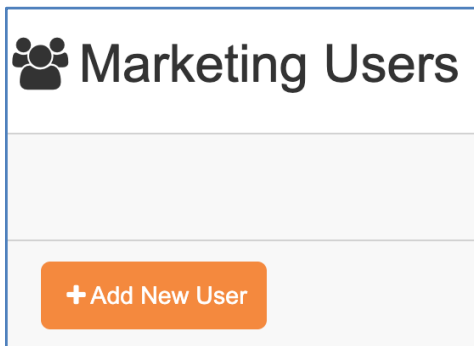


- Use the Show menu to determine how many users you would like to see at once.



### Add a new Marketing User

- On the Marketing Users page, click **Add New User**.



- On the New User page, under User Details, enter:
  - Username
  - Password (and Confirm Password)
  - First Name
  - Last Name
  - Email

A screenshot of the "New User" form. The form is titled "New User" and has "Cancel" and "Save" buttons in the top right. Under the "User Details" section, there are several input fields: "Username" (with "Content Author" entered), "First Name" (with "Patricia" entered), "Expiration Date" (with "4/12/2021" entered), "Password" (with "....." entered), "Last Name" (with "Plum" entered), "Lead Score" (empty), "Confirm Password" (with "....." entered), "Email" (with "pplum@garden.com" entered), and "Email Notifications" (with a checked checkbox labeled "Enable email notifications"). There is also a "Permissions" dropdown menu at the bottom.

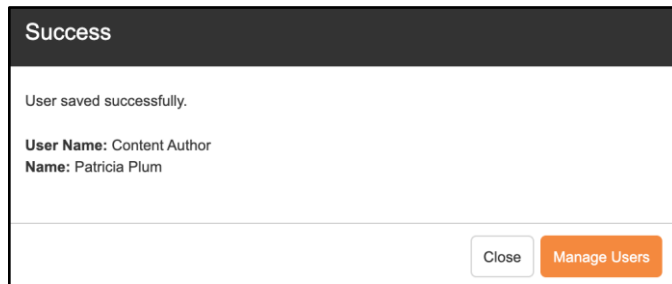
- Optionally, in the Permissions field, use the arrow to select a Site.

- Optionally, in the Expiration Date field, click the calendar icon to select a date.

- Optionally, in the Lead Score field, enter the information.
- Optionally, select the check box to enable email notifications.
- On the bottom half of the page, select check boxes in the Marketing column.

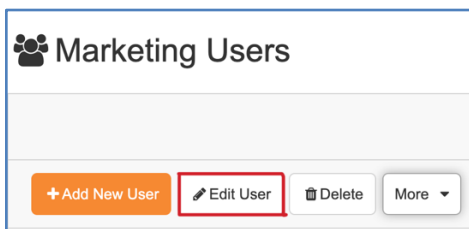
Content	Marketing	Commerce	Insights	Actions	
<input type="checkbox"/> Blog Administrator	<input type="checkbox"/> Custom Permission	<input type="checkbox"/> Analyst	<input type="checkbox"/> Administrator	<input type="button" value="Add All Admin Permissions"/>	<input type="button" value="Remove Site Permissions"/>
<input type="checkbox"/> CEGroup_0324	<input type="checkbox"/> Global Campaign Approver	<input type="checkbox"/> CSR	<input type="checkbox"/> Analyst	<input type="button" value="Remove All Permissions"/>	
<input type="checkbox"/> Content Administrator	<input type="checkbox"/> Global Campaign Author	<input type="checkbox"/> CSR Manager	<input type="checkbox"/> AnalystCustomPermission		
<input type="checkbox"/> Content authors	<input type="checkbox"/> Global Campaign Publisher	<input type="checkbox"/> Fulfillment			
<input type="checkbox"/> Custom Permission	<input type="checkbox"/> Installation Administrator	<input type="checkbox"/> Installation Administrator	<b>Social</b>		
<input type="checkbox"/> Form Administrator	<input type="checkbox"/> Library Admin	<input type="checkbox"/> Marketing	<input type="checkbox"/> Social Admin		
<input type="checkbox"/> Global Approver	<input type="checkbox"/> Marketer	<input type="checkbox"/> Merchandising	<input type="checkbox"/> Social User		
<input type="checkbox"/> Global Author	<input type="checkbox"/> Marketier Admin	<input type="checkbox"/> Site Administrator	<b>Translate</b>		
<input type="checkbox"/> Global Navigational Editor	<input type="checkbox"/> PercyGroup_0211	<input type="checkbox"/> WH Manager	<input type="checkbox"/> Translation Administrator		
<input type="checkbox"/> Global Publisher	<input type="checkbox"/> QAPercyGroup				
<input type="checkbox"/> Installation Administrator	<input type="checkbox"/> QATest0324				
<input type="checkbox"/> NavEditor	<input type="checkbox"/> Sales People				
<input type="checkbox"/> PercyGroup0325	<input type="checkbox"/> Site Administrator				
<input type="checkbox"/> PercyGroup0409					
<input type="checkbox"/> Previewer					
<input type="checkbox"/> QAPercyGroup109					
<input type="checkbox"/> QAPercyGroup88					
<input type="checkbox"/> Site Administrator					
<input type="checkbox"/> Template Admin					
<input type="checkbox"/> WebApi Administrator					

- Alternately, click **Add All Admin Permissions**
- Optionally, click **Remove Site Permissions** or **Remove All Permissions**.
  - At the top of the New User page, click **Save**.
  - In the Success dialog, click **Manage Users** or **Close**.



### Edit Marketing User

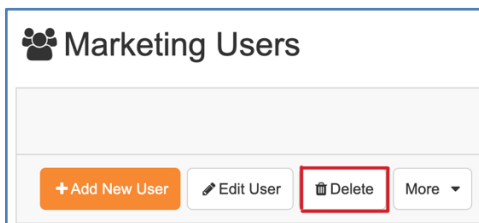
- On the Marketing Users page, select a user from the list.
- Click **Edit User**.



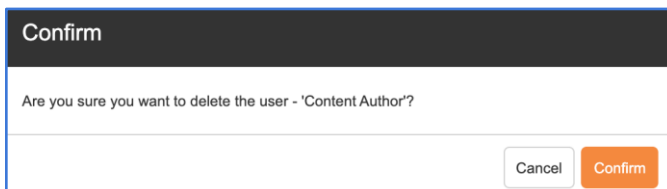
- On that Marketing User's page, make any revisions or additions.
- Click **Save**.

### Delete Marketing User

- On the Marketing Users page, select a user from the list.
- Click **Delete**.

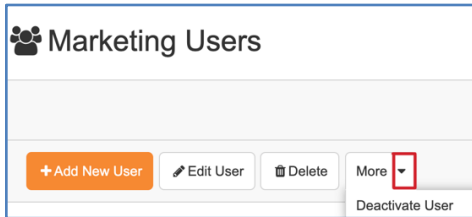


- In the Confirm dialog, click **Confirm**.



## Activate/Deactivate Marketing User

- On the Marketing Users page, select a user from the list.
- Using the More dropdown arrow, choose Deactivate User. (Alternately, choose Activate User.)



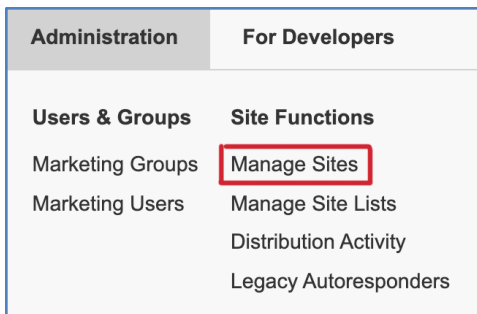
## Administration – Site Functions

### Manage Sites

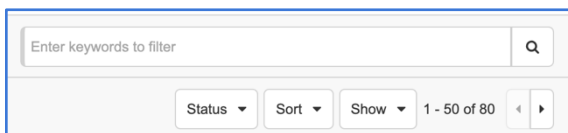
Manage your sites or add new sites; add tracking codes, or submit sites for translation. Bridgeline Unbound makes it easy for an Administrator to create and manage variants of the existing site. Each variant is based on the Master site.

You can use a sub-domain or path for each. If, for example, you want to add a French-language site to an existing site, your URL can be [www.fr.company.com](http://www.fr.company.com) or [www.company.com/fr](http://www.company.com/fr).

- Under Administration – Site Functions, select Manage Sites.

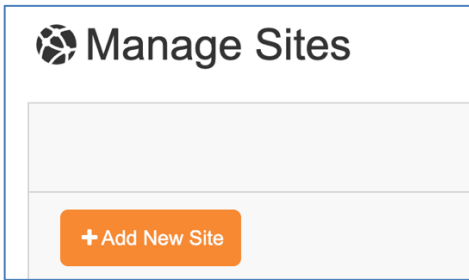


- On the Manage Sites page, use the search bar to filter groups, or use the Status, Sort or Show menus.



### Add a new site

- On the Manage Sites page, click **Add New Site**.



- On the Add New Variant Site page, Enter a Name and Primary URL.
- Optionally, add Additional URL(s) and a Description.
- Optionally, select the check boxes beside:
  - Enable Distribution
  - Allow Synchronization
  - Exclude from sharing
  - Force HTTP to HTTPS redirect

### Options for a new Variant Site

- On the Add New Variant Site page, use the tabs for:
  - Settings
  - Import Options
  - Attributes
  - Demographics.

### Settings

- Under the Settings tab, in the TimeZone field, use the arrow to select a Time Zone.

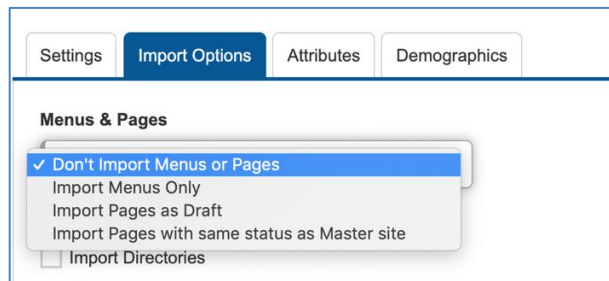
A screenshot of the 'Add New Variant Site' form. The form has a dark header with the title 'Add New Variant Site'. Below the header, there are four tabs: 'Settings' (selected), 'Import Options', 'Attributes', and 'Demographics'. The 'Settings' tab is active and shows several fields: 'Name' (text input with 'Sweden'), 'Primary URL' (text input with 'https://master.stage.demo.iapps.com/sweden'), 'Additional URL(s)' (text area), 'Description' (text area with 'Swedish language site'), 'TimeZone' (dropdown menu with '(UTC+01:00) Brussels, Copenhagen, Madrid, Paris'), 'External Code' (text input), 'UI Culture' (text input), and a checkbox 'Allow all administrators to have access to variant site' which is checked. There is also a 'Site Groups' section with a dropdown menu 'Select Site Groups' and a plus icon. At the bottom right, there are 'Close' and 'Save' buttons.

- Optionally, enter an External Code.

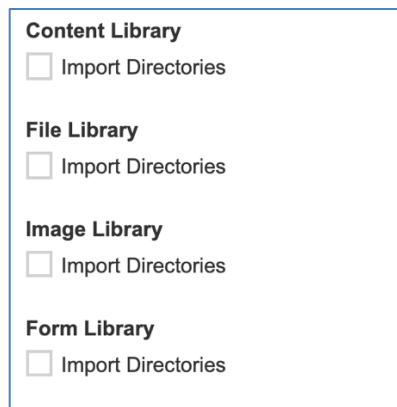
- Optionally, enter UI Culture.
- Optionally, select the check box beside “Allow all administrators to have access to variant site”.
- Optionally, in the Site Groups field, click the folder icon.
  - On the Select Site Group page, select a Site Group.
  - In the Selected Items panel, click **Select**.

### Import Options

- Under the Import Options tab, in the Menus & Pages field, use the arrow to select:
  - Don't import Menus or Pages
  - Import Menus Only
  - Import Pages as Draft
  - Import Pages with same status as Master site



- Select the check box beside Import Directories in the Content Library, File Library, Image Library and/or Form Library categories.



### Attributes

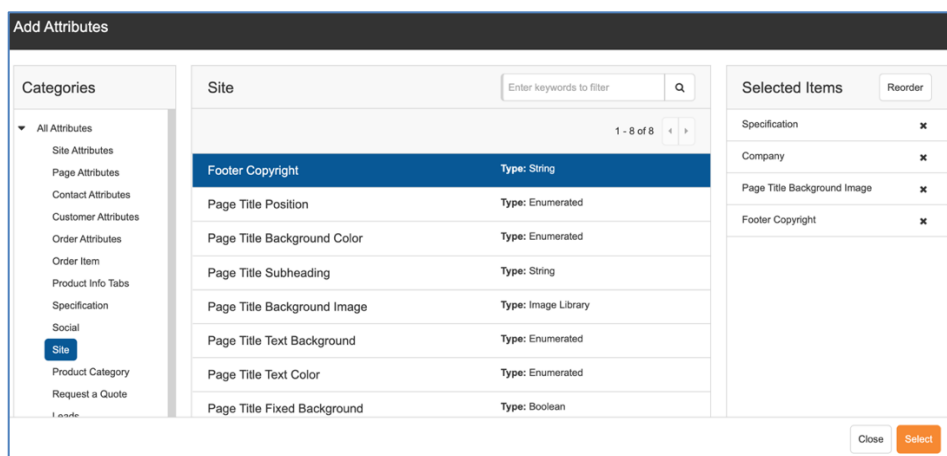
- Enter the information in the various URLs as well as Footer Copyright, New Buyers, and Variant Site Name fields.
- Optionally, select check boxes beside Propagate? and/or Editable?

Propagate?  Editable?

- Optionally, click **Add Attribute(s)**.

Add Attribute(s)

- On the Add Attributes page, in the Categories panel, make a selection.



- On the Add Attributes page, make a selection or selections from the middle panel.
- On the Add Attributes page, in the Selected Items panel, click **Select**.

## Demographics

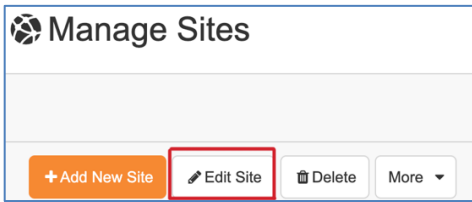
- Under the Demographics tab, in the search location field, start typing an address for a selection.
- In the Address Type field, use the arrow to select the address type.
- In the Country field, use the arrow to select a country.
- In the Address Line fields, enter the information.

- In the City field, enter the name of the city.

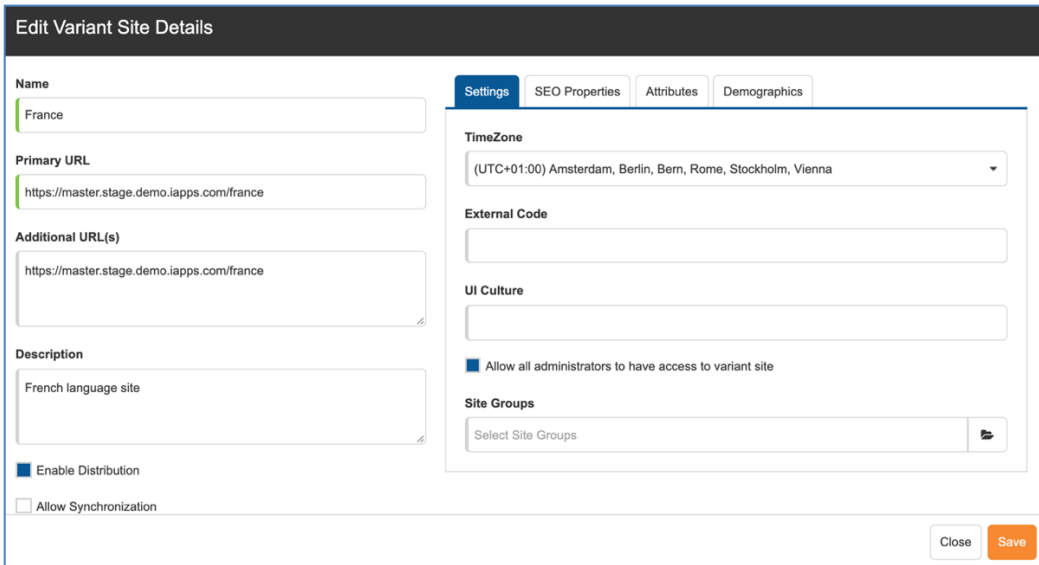
- In the State field, use the arrow to select a State.
- In the Postal Code field, enter the postal code.
- In the Phone Number field, enter a phone number.
- Click **Save**.

### Edit a site

- On the Manage Sites page, select a site.
- Click **Edit Site**.



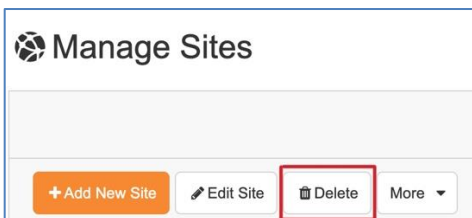
- On the Edit Variant Site Details page, make any revisions.



- Click **Save**.

### Delete a site

- On the Manage Sites page, select a site.
- Click **Delete**.



- In the Confirm dialog, click **Confirm** or **Cancel**.



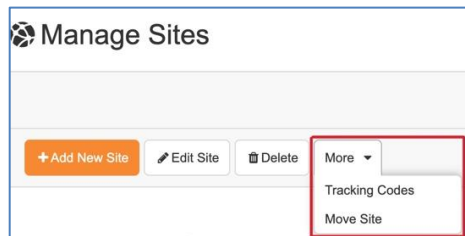
**Confirm**

Are you sure you want to delete the user - 'France'?

Cancel Confirm

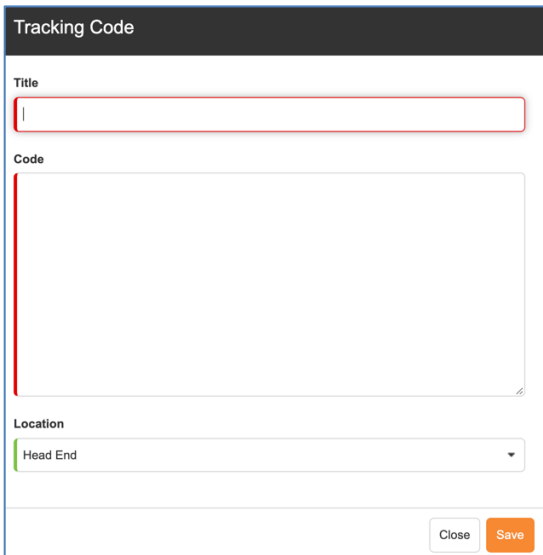
### More options

- Use the More dropdown arrow for
  - Tracking Codes
  - Move Site



### Tracking Codes

- On the Tracking Codes page, click **Add New Code**.
- In the Tracking Code dialog, enter a Title and Code.



**Tracking Code**

Title

Code

Location

Head End

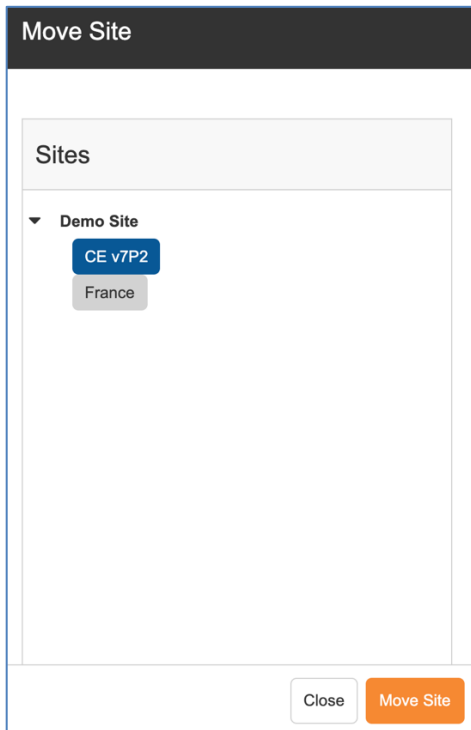
Close Save

- In the Location field, use the arrow to select
  - Head End
  - Body Start

- Body End
- Click Save.

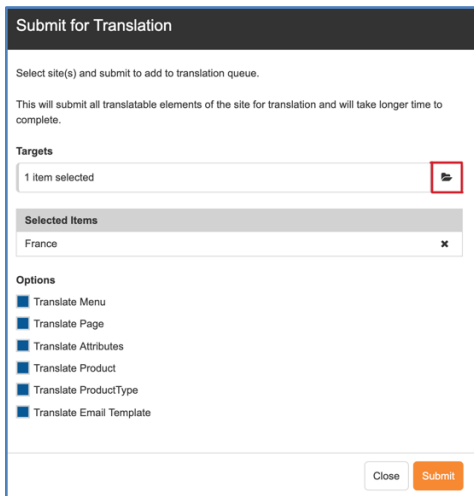
### Move Site

- In the Move Site dialog, select where you will move your site.
- Click **Move Site**.

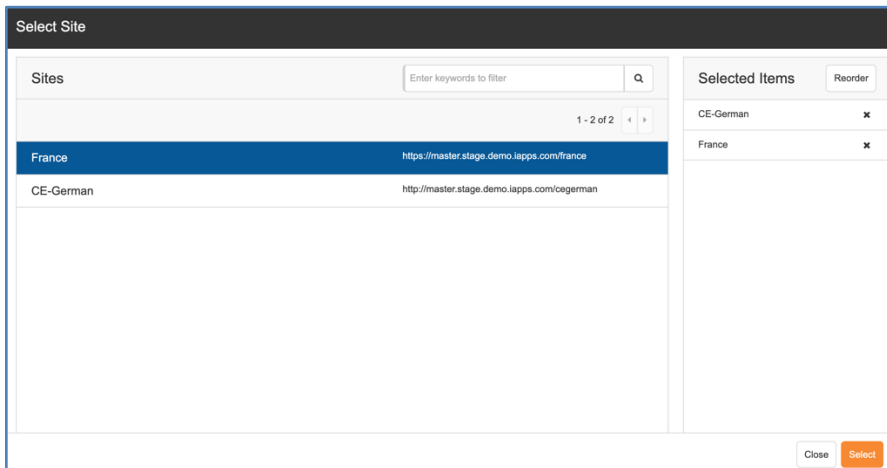


### Submit for Translation

- In the Submit for Translation dialog, in the Targets field, click the folder icon.



- On the Select Site page, choose a site or sites.



- In the Selected Items panel, click Select.
- On the Submit for Translation dialog, use the check boxes to select options.
- Click **Submit**.

## Manage Site Lists

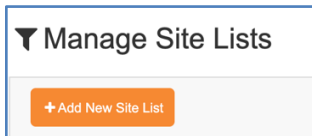
Manage your site lists or add new lists and filter them to suit your requirements.

- Under Administration – Site Functions, select **Manage Site lists**.

Administration	For Developers
<b>Users &amp; Groups</b>	<b>Site Functions</b>
Marketing Groups	Manage Sites
Marketing Users	<b>Manage Site Lists</b>
	Distribution Activity
	Legacy Autoresponders

### Add a Site list

- On the Manage Site Lists page, click Add New Site List.

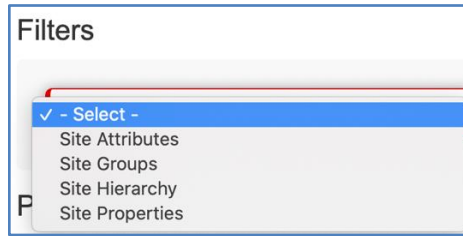


- On the Create Site List page, under Details, in the Name field, enter a name.
- Optionally, in the Description field, enter a description.

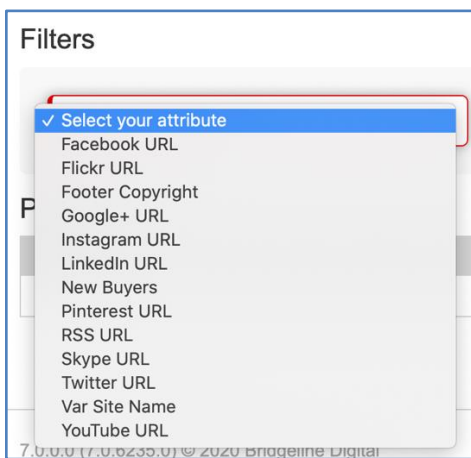
On the right side of the page, at the top, select one of these options:

- Available only for this site
- Available for all sites
- Available for all child sites.

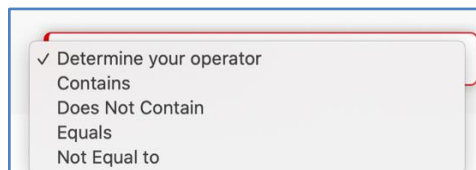
- Under Filters, in the Select field, use the dropdown arrow to select one of these from the menu:
  - Site Attributes
  - Site Groups
  - Site Hierarchy
  - Site Properties



- When you select a filter, follow the sequence of actions now displayed.
- For example, if you select Site Attributes, in the Select your attribute field, use the dropdown arrow for a menu of attributes.



- In the following field, in the Determine your operator field, use the dropdown arrow to choose one of these options:
  - Contains
  - Does Not Contain
  - Equals
  - Not Equal to



- In the next field, enter the information.
- To keep adding filters, use the plus sign at the right of the filter fields. Conversely, to erase one, use the delete icon. Click Or or And.

Filters

Site Groups Contains 1 item selected

- Select -

OR AND

+ -

- In the next row of fields, in the Select field, choose another category of attributes and follow the same sequence.
- As another example, if you first choose Site Groups in the Filters menu, in the following field (Determine your operator), use the dropdown arrow to select from the menu. If you select “Contains”, in the next field, click the folder icon to navigate to the item you want to include.

Filters

Site Groups Contains 1 item selected

OR AND

Child Equals France

OR AND

Title Equals Site of your Life

OR AND

Country Equals Brazil

OR AND

Title Equals Regio

OR AND

Site Groups Contains 1 item selected

+ -

- Under Preview, the URL you select in Filters is displayed here.

Preview Displaying 2 of 2 sites

Name	Url
CE-German	http://master.stage.demo.iapps.com/cegerman
iAPPS Demo Site (Master)	https://master.stage.demo.iapps.com

- When you have entered all your information, at the top of the Create Site List page, click **Save**.

### ▼ Create Site List

Cancel Save

**Details**

**Name**

Available only for this site  
 Available for all sites  
 Available for all child sites

**Description**

**Filters**

Site Groups  Contains  1 item selected

OR AND

Child  Equals  France

OR AND

Title  Equals  Site of your Life

OR AND

Country  Equals  Brazil

OR AND

Title  Equals  Regio

OR AND

Site Groups  Contains  1 item selected

**Preview** Displaying 2 of 2 sites

Name	Url
CE-German	http://master.stage.demo.iapps.com/cegerman
iAPPS Demo Site (Master)	https://master.stage.demo.iapps.com

### Edit a Site list

- On the Manage Site Lists page, click **Edit Site List**.

### ▼ Manage Site Lists

+ Add New Site List **Edit Site List** Delete

- On the Edit Site List page, make any revisions.
- Click **Save**.

### Delete a Site list

- On the Manage Site Lists page, click Delete.

### ▼ Manage Site Lists

+ Add New Site List Edit Site List **Delete**

- In the Confirm dialog, click Confirm.



## Distribution Activity

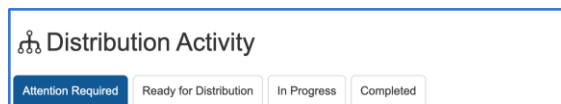
This section allows you to keep track of your distribution in four sections.

- Under Administration – Site Functions, select **Distribution Activity**.

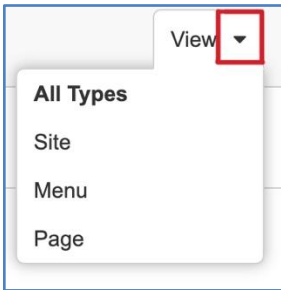
**Note:** The Distribution Activity function needs to be set up in advance. If it has not been set up yet, please submit a support ticket to <https://support.bridgeline.com/>

Administration	For Developers
<b>Users &amp; Groups</b>	<b>Site Functions</b>
Marketing Groups	Manage Sites
Marketing Users	Manage Site Lists
	<b>Distribution Activity</b>
	Legacy Autoresponders

- On the Distribution Activity page, there are options under these tabs:
  - Attention Required
  - Ready for Distribution
  - In Progress
  - Completed

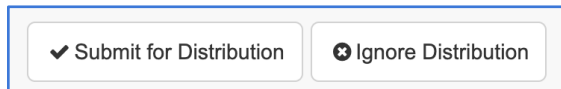


- In each section, or tab, use the View dropdown arrow and menu to filter the type of activity you would like to see.



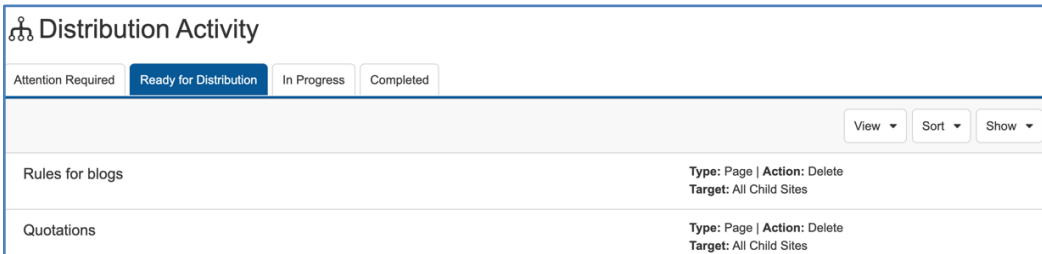
### Attention Required

- Under the Attention Required tab, select an item in the list.
  - Optionally, click either Submit for Distribution or Ignore Distribution.



### Ready for Distribution

- Under the Ready for Distribution tab, you can view the items that are ready for distribution.



### In Progress & Completed

- Under the In Progress and Completed tabs, you can also see the status of a page or pages.



- At the top of the list, click **View Details**.
- A Distribution Items dialog appears. Click **Close**.

## Legacy Autoresponders

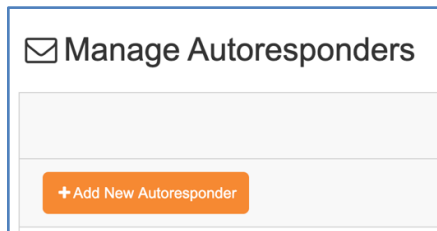
Manage how, when, and in what way, to automatically respond to email enquiries.

- Under Administration – Site Functions, select Legacy Autoresponders.

Administration	For Developers
<b>Users &amp; Groups</b>	<b>Site Functions</b>
Marketing Groups	Manage Sites
Marketing Users	Manage Site Lists
	Distribution Activity
	<b>Legacy Autoresponders</b>

### Add an autoresponder

- On the Manage Autoresponders page, click **Add New Autoresponder**.



- On the Email Details page, in the Name field, enter a name.

- In the Email Subject field, enter the subject.
- In the Sender Name field, enter the name of the sender.
- In the Sender Email field, enter an email address if it's different than the one that is automatically populated.
- Optionally, in the Reply-to Email, enter a reply address.

### Insert Dynamic Token

- Alternately, click **Insert Dynamic Token** for these fields:
  - Email Subject
  - Sender Name
  - Sender Email
  - Reply-to-Email

**Select Merge Token**

**Category**

- Select Category -

**Token**

- Select Token -

Close Insert Token

- In the Select Merge Token dialog, in the Category field, use the dropdown arrow to select a category.

**Select Merge Token**

**Category**

✓ - Select Category -

Site Attribute

Site

Contact

Campaign

- Select Token -

Close Insert Token

- In the Token field, use the dropdown arrow to select a token (depending on the category you choose).

**Select Merge Token**

**Category**

Campaign

**Token**

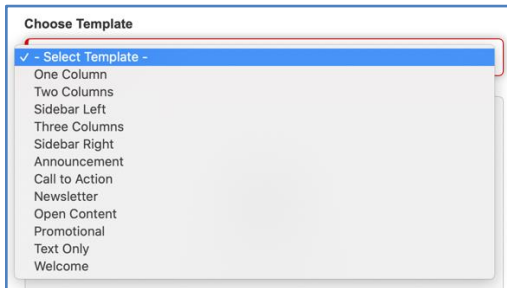
✓ - Select Token -

Send Date

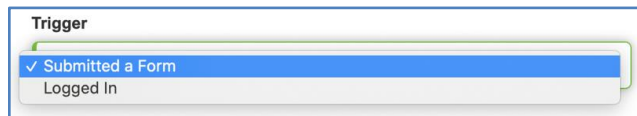
Rolling Send Date

Close Insert Token

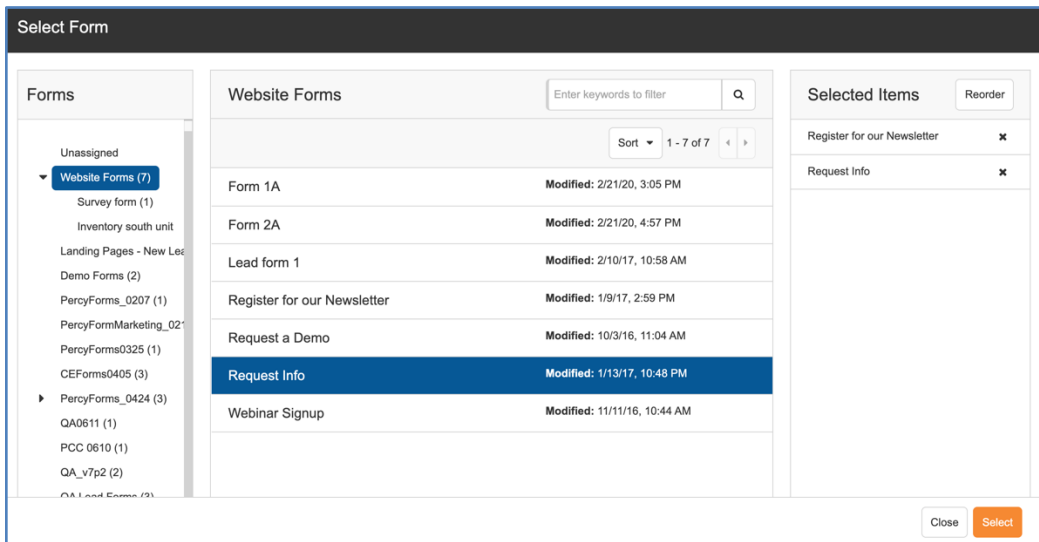
- In the Time after Trigger field, enter a number. In the Minutes field beside it, use the dropdown arrow to select
  - Minutes
  - Hours
  - Days
  - Months
- On the right side of the page, in the Choose Template field, use the dropdown arrow to select a template.



- In the Trigger field, use the dropdown arrow to select
  - Submitted a Form
  - Logged In



- If you choose Submitted a Form in the Trigger field, in the Select Forms field, click the folder icon.
- On the Select Form page, in the panel on the left under Forms, select a category of forms. In the center panel, in the Forms list, select a form or forms.



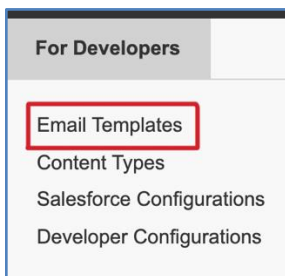
- In the panel on the right, under Selected Items, click **Select**.
- When you have entered all your information on the Email Details page, Click **Save & View in Email Editor**. (Please see [Edit in Email Editor](#).)

## For Developers

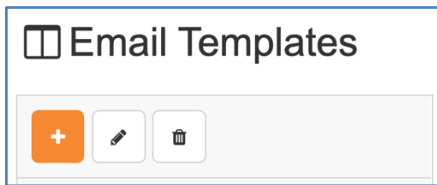
This is the place for you, as a developer, to create, customize and manage email templates, content types, styles, scripts, and configurations (including Salesforce configurations).

### Email Templates

- Under For Developers, select **Email Templates**.

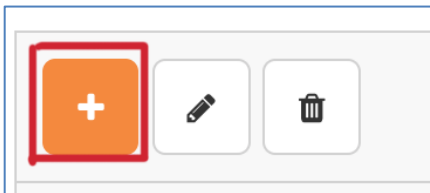


- On the Email Templates page, in the panel on the left, use the icons to add, edit or delete a template category.



### Add an Email Template category

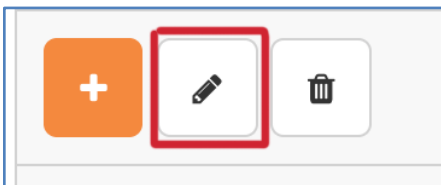
- On the Email Template page, in the panel on the left, click the **Add** icon.



- In the Details dialog, in the Name field, enter a name.
- Optionally, in the Description field, enter a description.
- Click **Save**.

### Edit an Email Template category

- On the Email Templates page, in the panel on the left, select a category.
- Click the **Edit** icon.



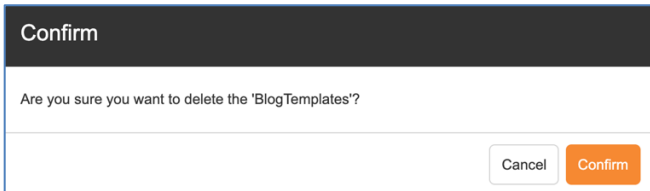
- In the Details dialog, make any revisions.
- Click **Save**.

### Delete an Email Template category

- On the Email Templates page, in the panel on the left, select a category.
- Click the **Delete** icon.

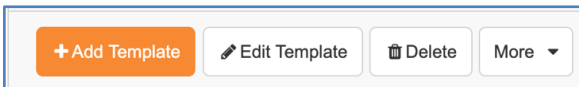


- In the Confirm dialog, click **Confirm**.

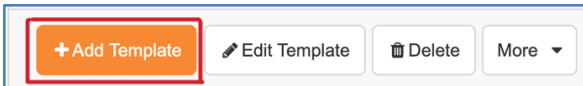


### Add an Email template

- On the Email Templates page, in the Templates section on the right, use the icons to manage your templates.



- In the Email Templates categories panel on the left, select a category.
- In the panel on the right, click **Add Template**.



- On the Template Details page, in the Title field, enter a title.

**Template Details**

**Title**

**Description**

**Template**

**Code File**

Page Part?  
 Allow access in child sites

**Preview** **Settings**

**Template Styles**

**Template Scripts**

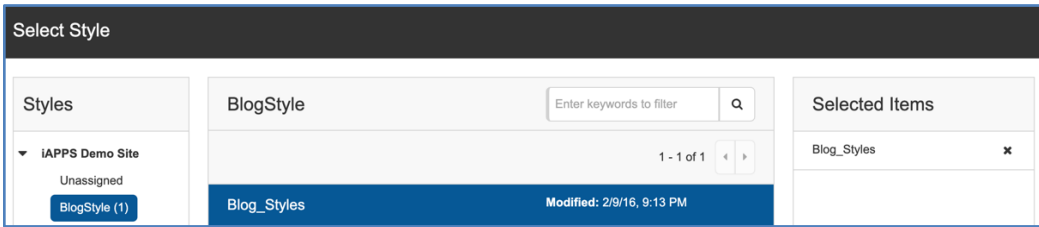
- Optionally, in the Description field, enter a description.
- In the Template field, click the folder icon.
- Select a template from your files.
- Optionally, in the Code File field, click the folder icon.
- Select a Code File from your files.
- Optionally, select the check box beside Page Part?
- Optionally, select the check box beside Allow access in child sites.
- Under the Preview tab, in the Preview Image field, click the folder icon.

**Preview** **Settings**

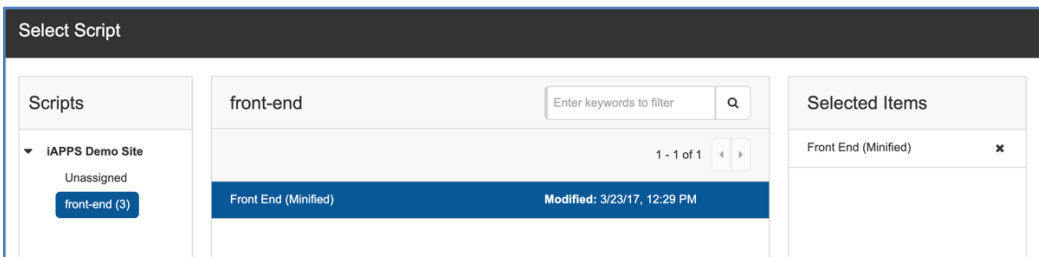
**Preview Image**

*Recommended dimensions: 380x240*

- Select the image from your files.
- Optionally, under the Settings tab, in the Template Styles field, click the folder icon.
- On the Select Style page, in the Styles panel, select a style category.



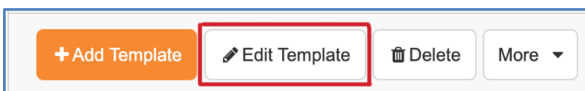
- In the list of styles panel in the center, select the style.
- In the Selected Items panel on the right, click **Select**.
- Optionally, under the Settings tab, in the Template Scripts field, click the folder icon.
  - On the Select Script page, in the Scripts panel, select the Script category.



- In the list of scripts panel in the center, select the script.
- In the Selected Items panel on the right, click **Select**.
- Click **Save**.

### Edit an Email Template

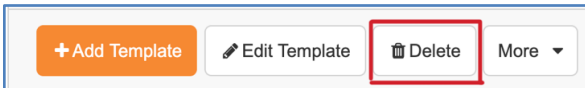
- On the Email Templates page, in the panel on the left, select a category.
- Choose a template from the templates list.
- Click **Edit**.



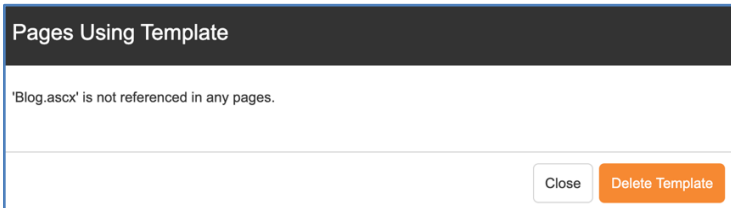
- On the Template Details page, make any revisions.
- Click **Save**.

### Delete an Email Template

- On the Email Templates page, in the panel on the left, select a category.
- Choose a template from the templates list. Click **Delete**.

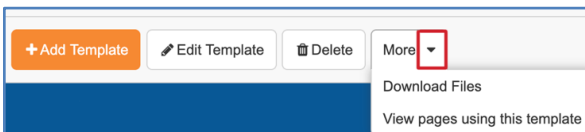


- Click **Save**.
- On the Pages Using Template dialog, if there are pages referenced in the template, you will receive a warning.
- Otherwise, click **Delete Template**.



### Email Template More Menu

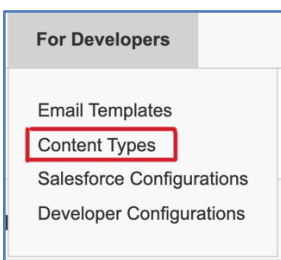
- On the Page Templates page, in the panel on the left, select a category.
- Choose a template from the templates list.
- Select the dropdown arrow beside More for options.



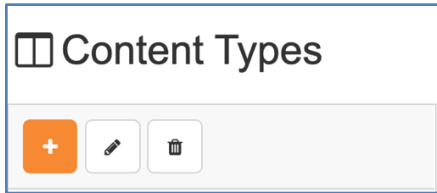
- If you choose Download Files, select a file or files on your computer or device.
- Click **Save**.
- If you choose View pages using this template, the Pages Using Template dialog appears.

### Content Types

- Under For Developers, select **Content Types**.

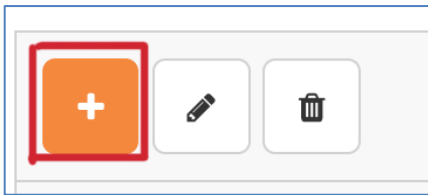


- On the Content Types page, in the panel on the left, use the icons to add, edit or delete a Content Type category.



#### Add a content type category

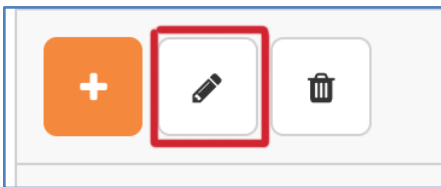
- On the Content Types page, in the panel on the left, click the **Add** icon.



- In the Details dialog, in the Name field, enter a name.
- Optionally, in the Description field, enter a description.
- Click **Save**.

#### Edit a content type category

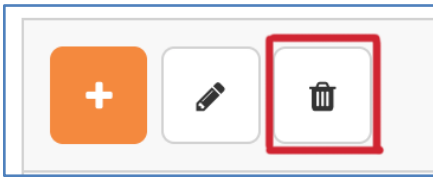
- On the Content Types page, in the panel on the left, select a category.
- Click the **Edit** icon.



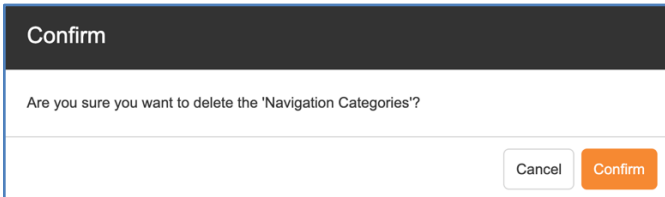
- In the Details dialog, make any revisions.
- Click **Save**.

#### Delete a content type category

- On the Content Types page, in the panel on the left, select a category.
- Click the **Delete** icon.

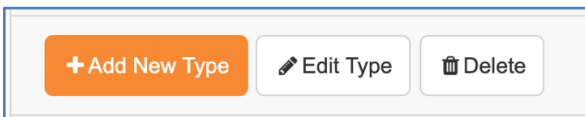


- In the Confirm dialog, click **Confirm**.

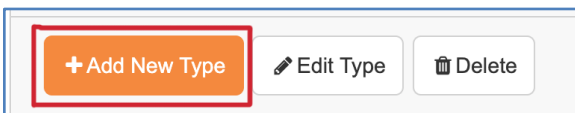


### Add a content type

- On the Content Types page, in the Content Type section on the right, use the icons to manage your templates.



- In the Content Types categories panel on the left, select a category.
- In the panel on the right, click **Add New Type**.

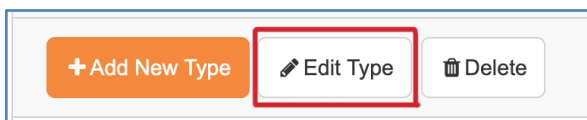


- On the Content Type Details page, in the Title field, enter a title.

- Optionally, in the Description field, enter a description.
- In the XML file field, click the folder icon.
- Select an XML file from your computer.
- In the XSLT File field, click the folder icon.
- Select an XSLT file from your computer.
- In the Preview Image field, click the folder icon.
- Select the image from your files.

### Edit a Content Type

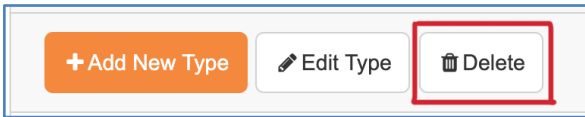
- On the Content Types page, in the panel on the left, select a category.
- Choose a template from the templates list. Click **Edit**.



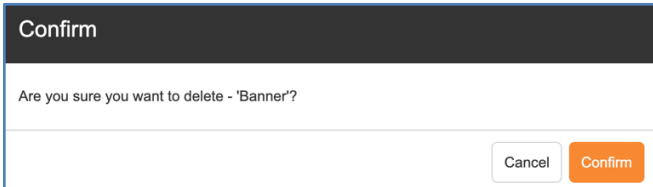
- On the Content Type Details page, make any revisions.
- Click **Save**.

### Delete a Content Type

- On the Content Types page, in the panel on the left, select a category.
- Choose a Content Type from the content types list.
- Click **Delete**.

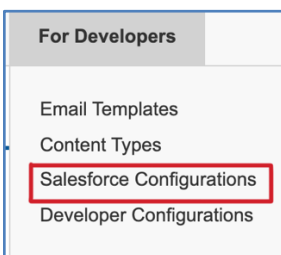


- In the Confirm dialog, click **Confirm**.

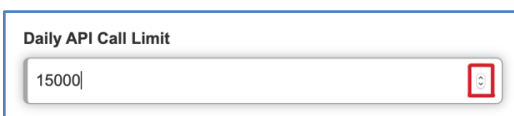


## Salesforce Configurations

- Under For Developers, select **Salesforce Configurations**.



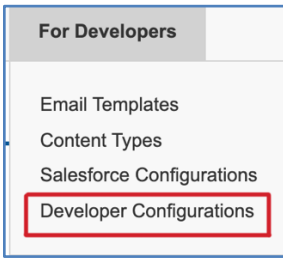
- On the Salesforce Authentication page, in Username field, enter your username.
- In the Password field, enter your password.
- In the Daily API Call Limit field, use the arrows to increase or decrease the call limit.



- Optionally, select the check boxes beside:
  - Enforce Daily API Call Limit
  - Enable Lead and Contact Synchronization
  - Synchronize Unsubscribes with Salesforce Email Opt Out
  - Click **Save**.

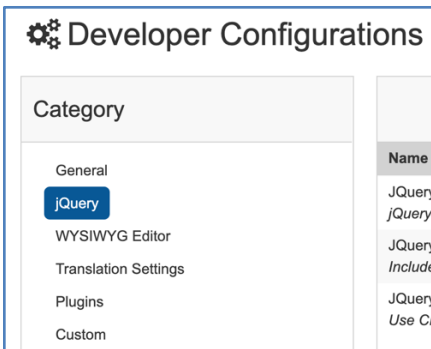
## Developer Configurations

- Under For Developers, select **Developer Configurations**.

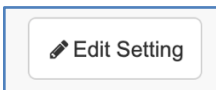


## Edit a Developer Configuration

- On the Developer Configurations page, in the panel on the left, select a category.



- In the panel on the right, choose a configuration from the list.
- Click **Edit Setting**.



- In the Site Setting dialog, make any revisions.

**Site Setting**

**Name**  
jQuery.CDNPath

**Description**  
jQuery UI CDN path

**Value**  
https://ajax.googleapis.com/ajax/libs/jquery/1.9.1/jquery.min.js

Close Save

- Click **Save**.

### Email Opt-in

If you have added an Email Opt-in to a Form, it will need to be configured in Developer Configurations.

- On the Developer Configurations Page, select Email Settings.
- In the panel on the right, select **Marketer.EnableDoubleOptin**
- At the top of the panel, click **Edit Setting**.

Campaigns Contacts Assets Administration For Developers FHHealy@bridgeline.com Sit

**Developer Configurations**

Category

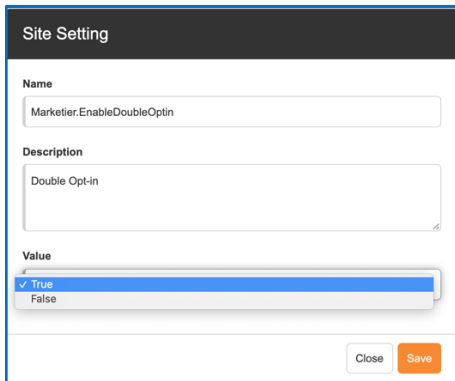
- General
- jQuery
- WYSIWYG Editor
- Email Settings**
- Email Processor Settings
- Translation Settings
- Plugins
- Custom

**Edit Setting** 1 - 6 of 6

Name	Value
CampaignSettings.SendLimitPerMonth	Maximum number of campaigns allowed for Marketer per month
Marketer.ContactList.AllowedAttributes	Allowed contact attributes for marketer contact list
Marketer.ContactList.AllowedFilters	Allowed default filters for marketer contact list
<b>Marketer.EnableDoubleOptin</b>	<b>false</b>
<i>Double Opt-in</i>	
OptOutOfAllCampaigns	true
<i>Opt-out of All Emails</i>	

- In the Site Setting dialog, under Value, use the dropdown arrow to select **True**.

- Click **Save**.

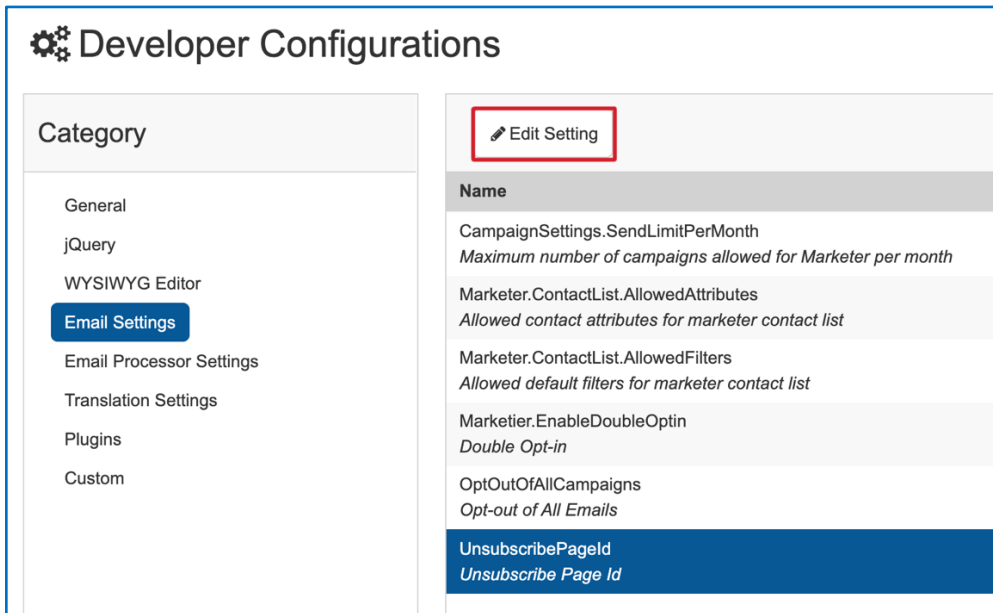


The image shows a 'Site Setting' dialog box. It has three main sections: 'Name' with the text 'Marketier.EnableDoubleOptin', 'Description' with the text 'Double Opt-in', and 'Value' with a dropdown menu showing 'True' selected and 'False' below it. At the bottom right, there are 'Close' and 'Save' buttons.

## Email unsubscribe

To give your customers the option to unsubscribe from emails, you will need to configure this in Developer Configurations.

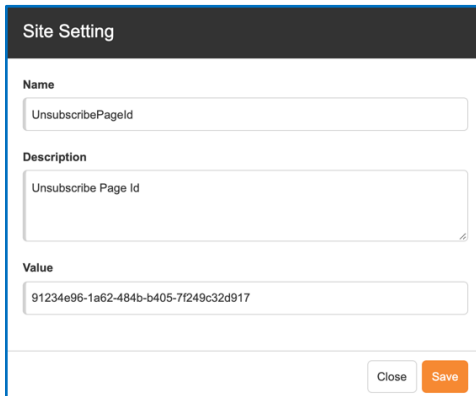
- On the Developer Configurations Page, select Email Settings.
- In the panel on the right, select **UnsubscribePageId**
- At the top of the panel, click **Edit Setting**.



The image shows the 'Developer Configurations' page. On the left is a 'Category' sidebar with options: General, jQuery, WYSIWYG Editor, **Email Settings** (highlighted), Email Processor Settings, Translation Settings, Plugins, and Custom. On the right is a list of settings. At the top of this list is an 'Edit Setting' button with a pencil icon, highlighted with a red box. Below it is a table of settings:

Name
CampaignSettings.SendLimitPerMonth <i>Maximum number of campaigns allowed for Marketer per month</i>
Marketer.ContactList.AllowedAttributes <i>Allowed contact attributes for marketer contact list</i>
Marketer.ContactList.AllowedFilters <i>Allowed default filters for marketer contact list</i>
Marketier.EnableDoubleOptin <i>Double Opt-in</i>
OptOutOfAllCampaigns <i>Opt-out of All Emails</i>
<b>UnsubscribePageId</b> <i>Unsubscribe Page Id</i>

- In the Site Settings dialog, under Value, enter an external URL.



The image shows a 'Site Setting' dialog box with a dark header. It contains three input fields: 'Name' with the value 'UnsubscribePageId', 'Description' with the value 'Unsubscribe Page Id', and 'Value' with the value '91234e96-1a62-484b-b405-7f249c32d917'. At the bottom right, there are 'Close' and 'Save' buttons.

Field	Value
Name	UnsubscribePageId
Description	Unsubscribe Page Id
Value	91234e96-1a62-484b-b405-7f249c32d917