



MARKETING

Campaigns & Email Templates

Create, edit, schedule, and send one-time email campaigns. Save designs as reusable templates.

Prepared by Terrance Bortell · May 16, 2026

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A **Campaign** is a one-time email send — a newsletter, a promo, an announcement. You write it, schedule it (or send now), and it goes once. **Email Templates** are reusable starting points you can drop into any campaign so you don't rebuild from scratch every time.

Creating a Campaign

1. Go to **Campaigns** → **Create Campaign**.
2. Pick a starting point: blank canvas, a saved template, or **Import from Canva** (a .zip export from Canva).
3. Write a **subject line** and **preview text** (the gray line that shows in the inbox before opening — most clients show 50-100 characters).
4. Compose the email body in the drag-and-drop editor. Drag blocks (text, image, button, divider, video, image group) from the left panel.
5. On **Recipients**, pick the audience(s), segment(s), or tag(s) to send to.
6. On **Review & Send**, send a test to yourself, double-check everything, then schedule or send now.

The Email Editor

Marketing uses a drag-and-drop block-based editor. Common blocks:

- **Text** — paragraphs, headings, lists, links
- **Image** — single image with optional caption
- **Button** — call-to-action button with a link, color, and rounded corners
- **Divider** — horizontal rule between sections
- **Spacer** — vertical breathing room

- **Video** — embedded video player (Apple Mail) with a poster-image fallback (Gmail, Outlook)
- **Image group** — 2, 3, or 4 images side-by-side
- **HTML** — raw HTML for advanced layouts

Test Sends

Always send a test to yourself before pulling the trigger on a real send. Test sends use a real contact (yours) so all merge tags resolve to real values, and you see exactly what your contacts will see.

ADVISOR TIP

Look at the test on both desktop and your phone — that catches 90% of issues before they reach your audience. Especially important for image-heavy designs.

Scheduling vs. Sending Now

- **Send now** — campaigns enter the send queue immediately. Large sends are batched and metered to protect your sending reputation; expect a few minutes for a typical 1,000-contact send.
- **Schedule** — pick a future date and time. The campaign holds until that moment, then enters the queue. You can unschedule or edit until ~5 minutes before send time.

Email Templates

Templates are saved campaign starting points. Build a campaign once, save it as a template, and reuse the layout (with edited content) for future sends. Useful for monthly newsletters, recurring promo formats, or any "fill in the blanks" design pattern.

Creating a Template

1. Build any campaign normally.
2. In the editor menu, click **Save as Template** and give it a name.
3. The template appears under **Templates** in the main nav.

Using a Template

When creating a new campaign, choose **Start from Template** and pick from your saved templates. The new campaign is pre-filled with the template content, ready to edit.

Canva-Imported Campaigns

Campaigns imported from Canva are stored as raw HTML — they cannot be edited in the drag-and-drop editor. To update a Canva campaign, change the design in Canva, re-export the HTML, and import again. Merge tags work normally as long as you type them into Canva text frames before exporting.

See the **Import Campaigns from Canva** guide for the full export-and-import walkthrough including the video walkthrough.