

Scheduling email blasts is as easy as 1-2-3. First, create a **template** with photos & words. Next, create **lists** of those who should receive the email. Finally, create a **campaign** combining the template with the list.

Go to Email Marketing

- From STX Cloud, click **Marketing** or **Marketing Email** on the home page, navigation bar or right side bar
- Click **Marketing Email**

Setup Company Info

Note: Complete this step only if it is your first time or if you need to update information.

- Click on the **Company Name** in the upper right
- Click **My Account**
- Update the **Profile Tab** and the **Company Tab**
- Click **Save**

Create a Template

Click **Templates** to create, select, upload or import an email design

- **+ Create New (Drag & Drop Editor)** allows users to simply drag and drop place holders to build an email design as a promotion, newsletter or announcement with images & social media signatures.
 - Enter a **Template Name**
 - Use the drop down menu in the email right corner to drag a variety of design options into your email i.e. Logo, Images, Footers, Social Media, Titles, etc.
 - Highlight text and use the menu bar along the side to update the font, colors, alignment, links, etc.
 - Click **Save** when completed
- **+ Create New** is an ideal selection for primarily text emails with less design elements
 - Enter a **Template Name**
 - Use the design menu along the top to create an email template
 - Click **Save** when completed
- **Upload a Template** is an option for those who would rather upload a very specific advanced .html design.
 - Click **Upload a Template** then click **this example archive** to view an example of an HTML file to upload.

Create a List (exclusive to STX Cloud Enhanced and Advanced accounts)

- **STX Cloud Enhanced and Advanced** users have the ability to create specific filters & list builders.
 - Choose **List Builder** to create a list of client emails based on filters related to client service visits, appointment status, referrals, birthdate, gender, products purchased, and much more!
 - Click **Search**
 - Click **See Client** to view the list of clients who will receive this email
 - Click **Create List**
 - The List will be shown in 'Lists' and selectable for your campaign
- **STX Cloud Indie & Basic Packages** users have a default list of all STX Cloud Client subscribers to this account called '**Opt In**'

Schedule a One-Time Email Campaign

- Click **Campaigns**
 - Click **All Campaigns** to schedule an email template to be sent one-time to the users in the list(s).
 - Click **Create New**
 - Assign a **Campaign Name**
 - Choose a **List** (choose the 'opt-in' list for all subscribers)
 - Click **Save and Next**
 - Update **Reply To** as needed
 - Scroll down, click **Save and next**
 - Click **Change/Select Template**
 - Note: When selecting an existing template, click the **Choose** button
 - Edit as needed
 - Scroll Down, click **Save and next**
 - Choose **Send At** Date/Time
 - By default will show 5 minutes before and will send ASAP if left as-is
 - Scroll Down, click **Send Campaign**
 - Campaign will appear in a list, to stop the email from sending, click the PAUSE button

Note: Once lists and templates are created, they can be reused.