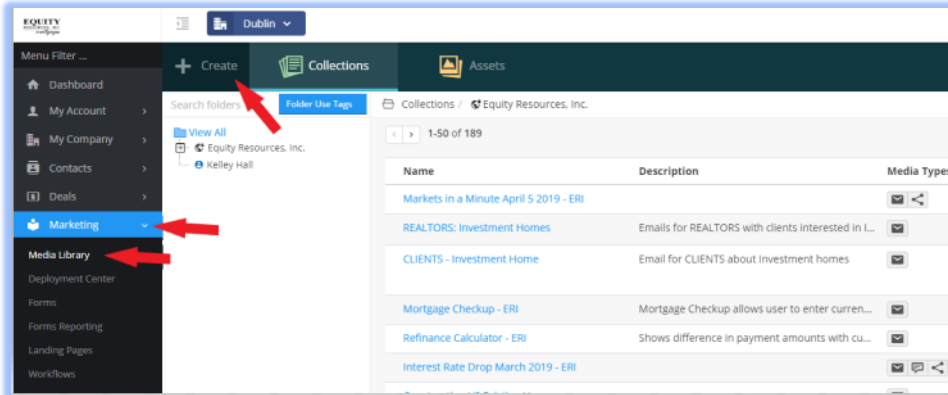
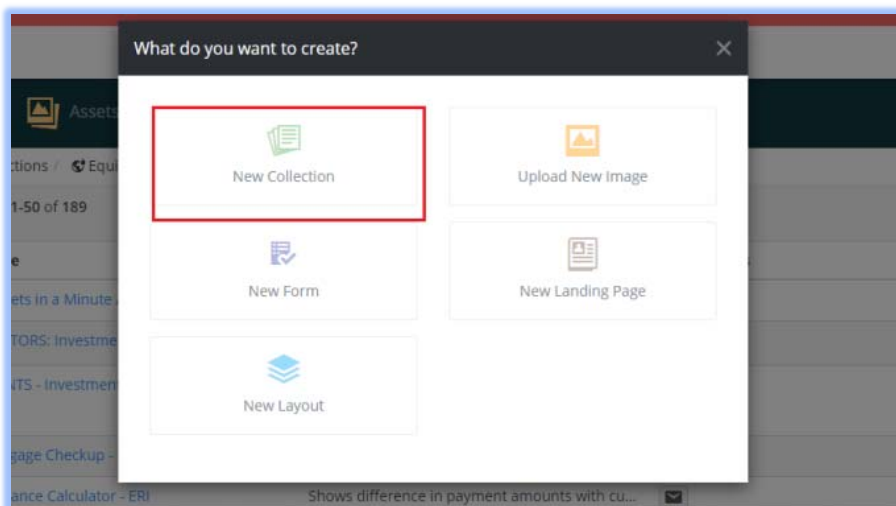


ERMA 3.0 – Creating an Email:

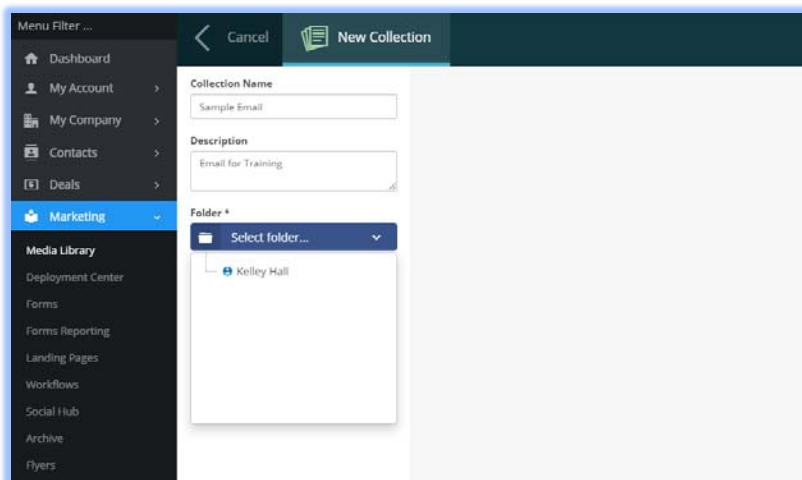
1. Click on Marketing, Media Library, Create:



2. Click “New Collection”:



3. Name your collection. Add a description and select your folder from the folder drop down:



4. Then click “Create Collection”:

The screenshot shows the 'New Collection' form. On the left is a sidebar menu with options like Dashboard, My Account, My Company, Contacts, Deals, Marketing, Media Library, Deployment Center, Forms, Forms Reporting, Landing Pages, Workflows, Social Hub, and Archive. The 'Marketing' menu item is selected. The main form area has a 'Collection Name' field with 'Sample Email', a 'Description' field with 'Email for Training', and a 'Folder *' dropdown menu set to 'Kelley Hall'. At the bottom left of the form, there is a blue button with a document icon and the text 'Create Collection', which is highlighted by a red rectangular box.

5. Choose a Layout – This will **ALWAYS** be “Basic Email ERI”. Choose if you want it to be cobranded and add a subject line:

The screenshot shows the 'Edit Collection' form. The sidebar menu is the same as in the previous screenshot. The main form area has a 'Collection Name' field with 'Sample Email', a 'Description' field with 'Email for Training', and a 'Tags' field with a search bar. Below these is a blue 'Save Media' button. To the right, there are sections for 'Email' with 'Preview' and 'Send Test Email' buttons, 'Layout' (Basic Email ERI), 'Co-branded' (Yes), 'Subject' (My Sample Subject Line), and 'Header' ({{Company Image - Primary Logo Thumbnail}}). Below the header is a 'Content' section with a rich text editor toolbar and a 'Merge Fields' button.

6. Type up the body of your email and add Merge Fields that you would like such as the salutation:

This screenshot is a closer view of the 'Edit Collection' form, specifically the 'Merge Fields' dropdown menu. The menu is open, showing a list of available fields: 'Common', 'Current Date', 'Recipient Email', 'Recipient Name - First', 'Recipient Name - Last', 'Recipient Name - Nickname', and 'Contact'. A red arrow points to the 'Recipient Name - Nickname' option, which is highlighted in blue.

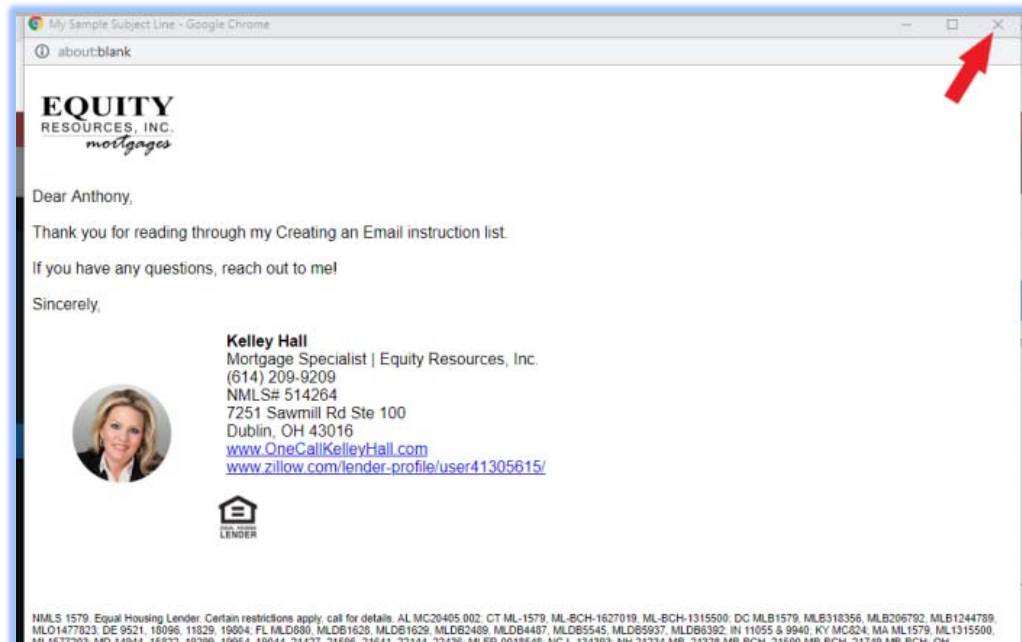
7. Add your email. Make sure your Font is Arial and 12pt. This will insure it matches the signature:

8. Preview your email to make sure it looks the way you would like it by
a. clicking on the “Preview” button:

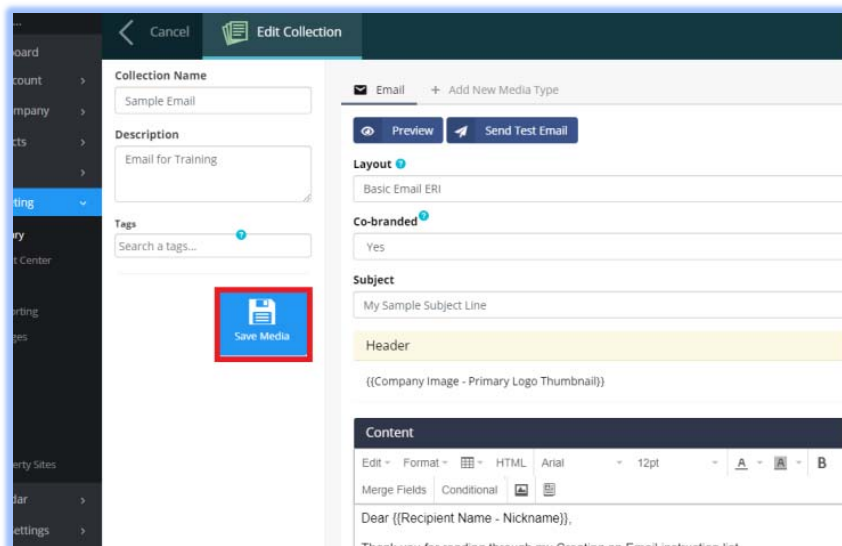
- b. Selecting a borrower by typing in their name or part of their name, selecting them and then clicking on “Preview”:

NAME	EMAIL	
Anthony Kirkpatrick	rosemaryk2008@gmail.com	select
Arica Robbins Worth	arica.robbsworth@herrealtors.com	select
Brenda Ulbrich-Roe		select
Carol Garverick	carolgarverick@aol.com	select
Cindy Price	cindy.price3@gmail.com	select
Cricket Such	rmxbug@aol.com	select
Darick Hunter	darickhunter@yahoo.com	select
Darrick Klamut	dklamut@kasselrealestate.com	select
David Brickley	dbprojectmanager@aol.com	select
Derick Eblin	Derick4248@gmail.com	select
Doug Price	doug@pricerelty.com	select
Eric Brassfield	ERICSBASSFIELD@GMAIL.COM	select
Eric Carman	eric.carman@kingthompson.com	select
Eric Cramer	dimpledeana@hotmail.com	select
Eric Ferriman	kferriman@gmail.com	select
Eric Fete	efete71@gmail.com	select

- c. Review the email and then cancel out:



9. Once you are happy with your email, click on “Save Media”:



10. You will be prompted to send for approval. The Admin checks the email for compliance. Once approved your email will be ready to send out!

Approval Needed

This item will be locked until it is approved or denied

Describe Changes

Optional

250 character limit

Submit

Cancel