



How to Create or Edit a Marketo Email

EMAIL - Description

12.17.15

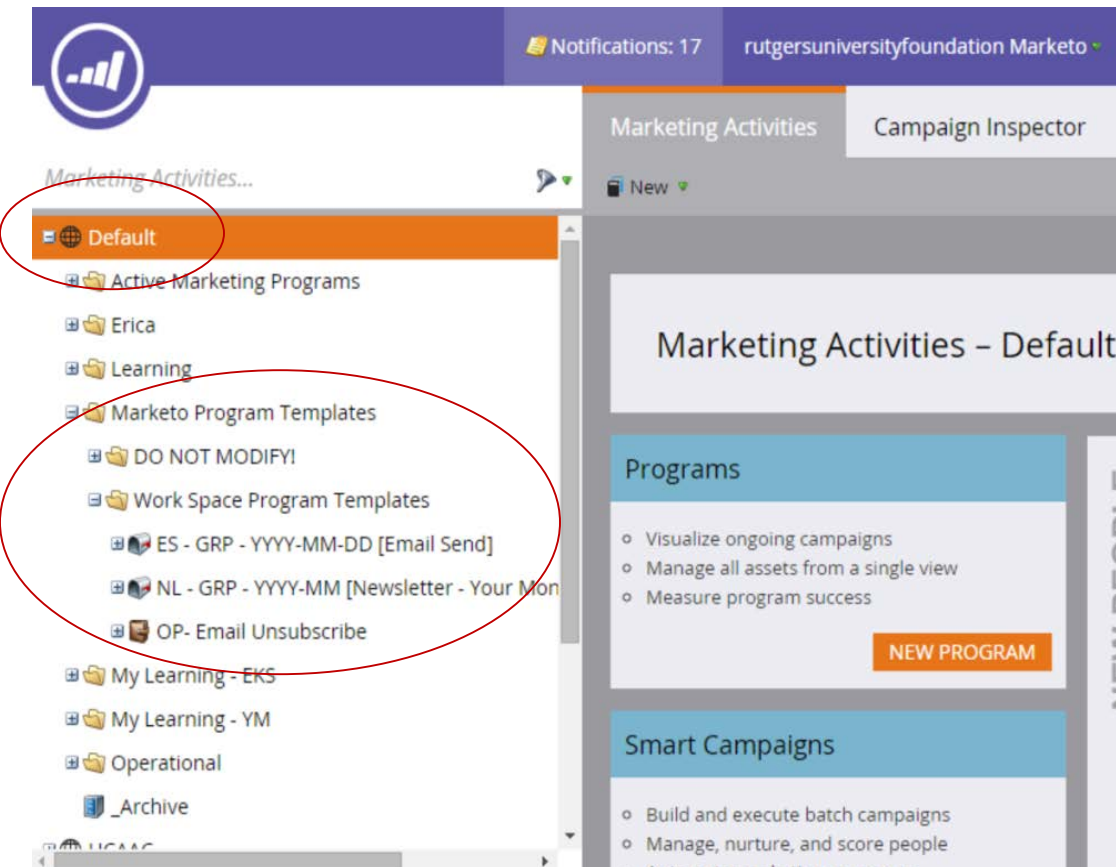
What will this presentation teach you?

- How to edit an email from creation
- How to edit an email from a draft
- How to edit To and From addresses
- How and where to add images
- How to modify text within your email
- How to add a link to your email
- How to approve and unapprove emails

Navigating to Marketing Activities: from Marketo, click on the Marketing Activities block, or click on the Marketo power ball.

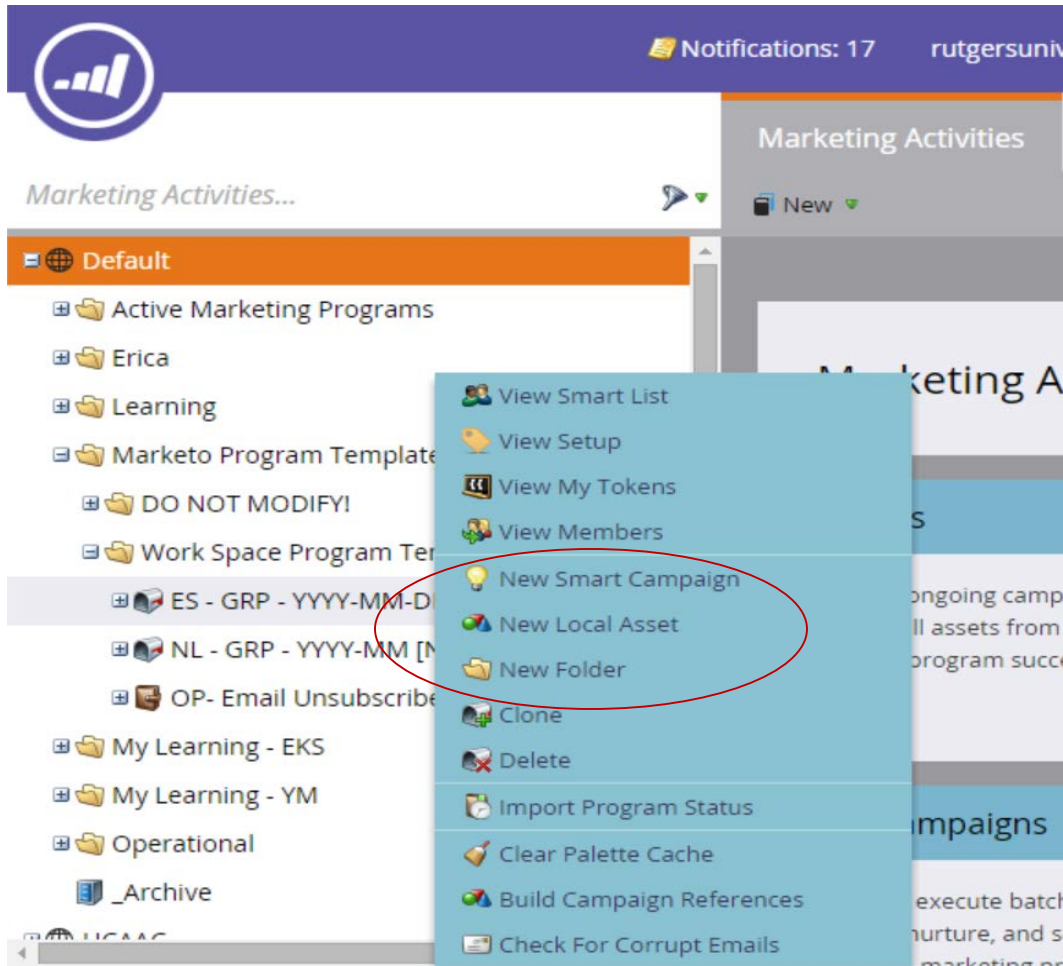
The screenshot displays the Marketo user interface. At the top, a purple navigation bar contains the following elements from left to right: a 'History...' dropdown menu, a notification bell icon with 'Notifications: 17', the user name 'rutgersuniversityfoundation Marketo', a 'History' dropdown, an 'Admin' gear icon, a 'Community' icon, and a 'Help' icon. Below the navigation bar, the main content area features a grid of application tiles. The 'Marketing Activities' tile, which has a briefcase icon, is circled in red. Other tiles include 'Design Studio' (palette icon), 'Database' (server icon), 'Analytics' (presentation screen icon), 'Email Explorer' (satellite dish icon), 'Calendar' (calendar icon showing '31'), 'Community' (speech bubble icon), and 'SEO' (compass icon). A 'What's New!' section is visible in the bottom right corner of the main content area. On the left side of the interface, there is a sidebar with a 'History...' dropdown and a 'History' button with a magnifying glass icon. A red circle highlights the 'History...' dropdown in the sidebar.

Once in Marketing Activities, navigate to the program you would like to create an email in



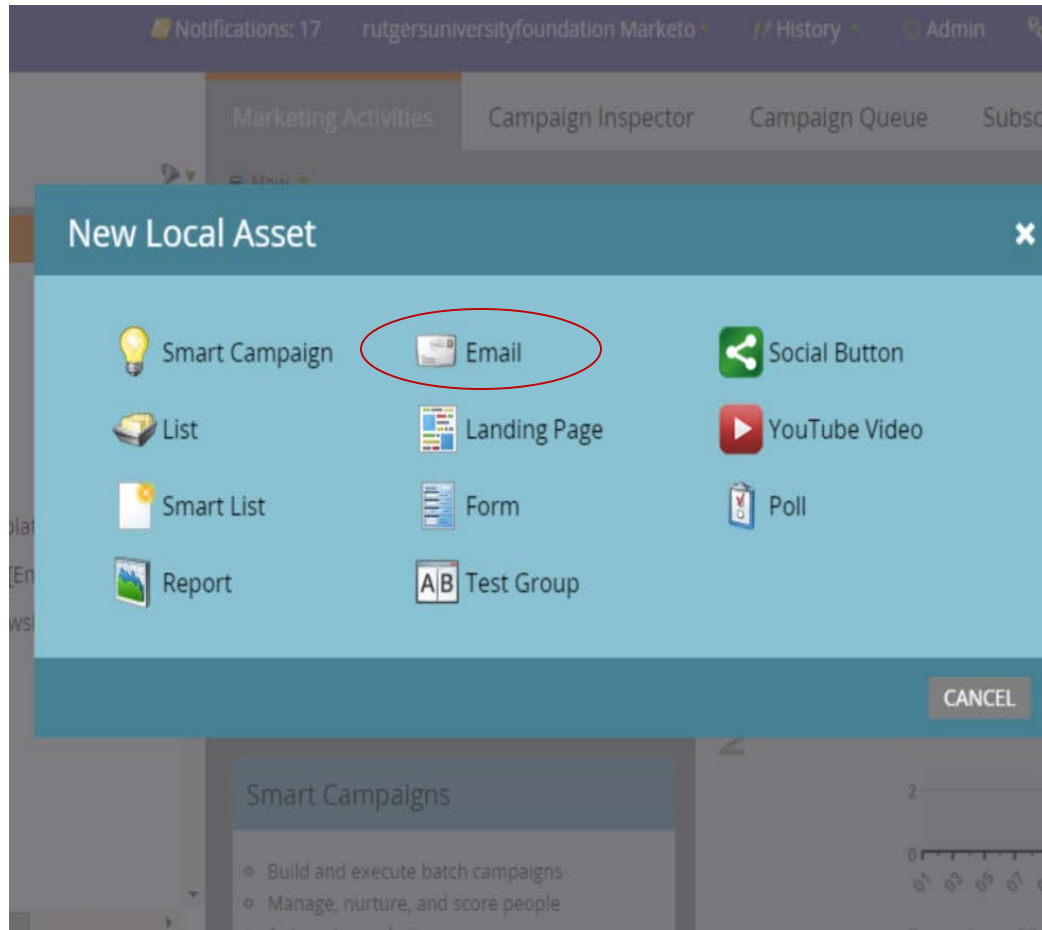
- In Marketing Activities, expand “Default” in the tree
- Expand “Marketo Program Templates”
- Expand “Work Space Program Templates”

Add an email to the program



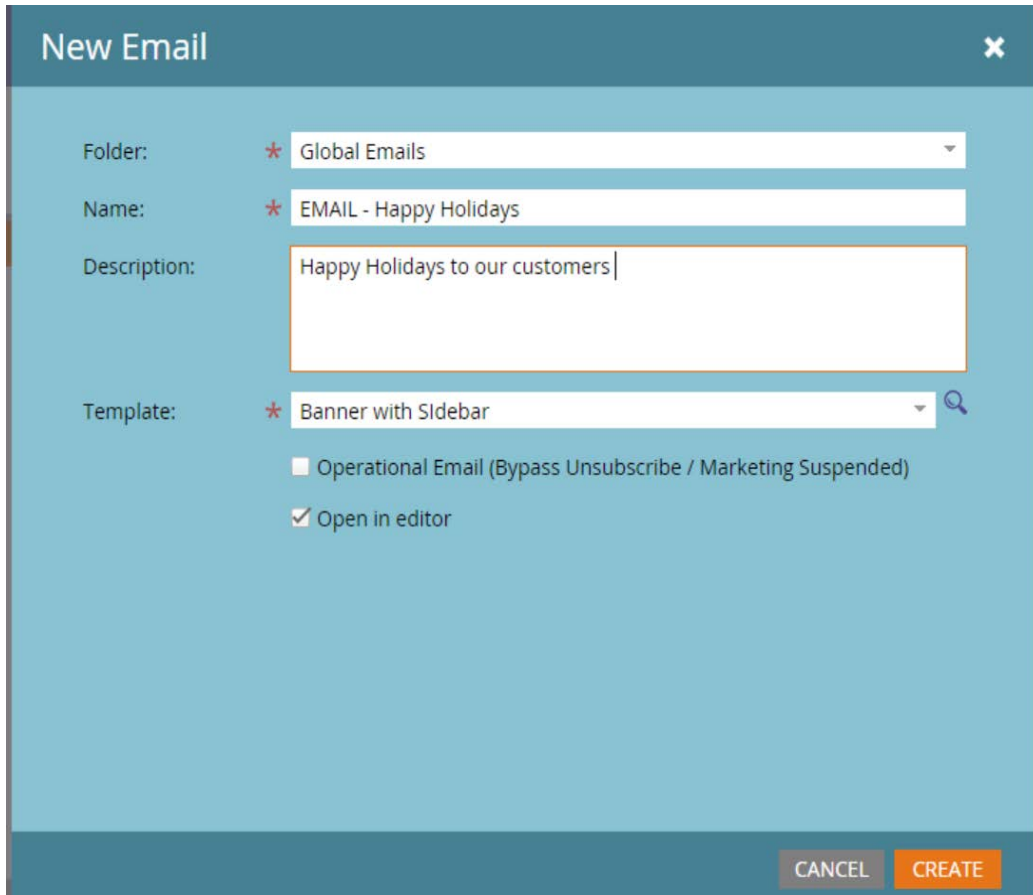
- Right click the program you would like to add an email to
- Select “New Local Asset”

Select Email as your new local asset



- Select “Email”

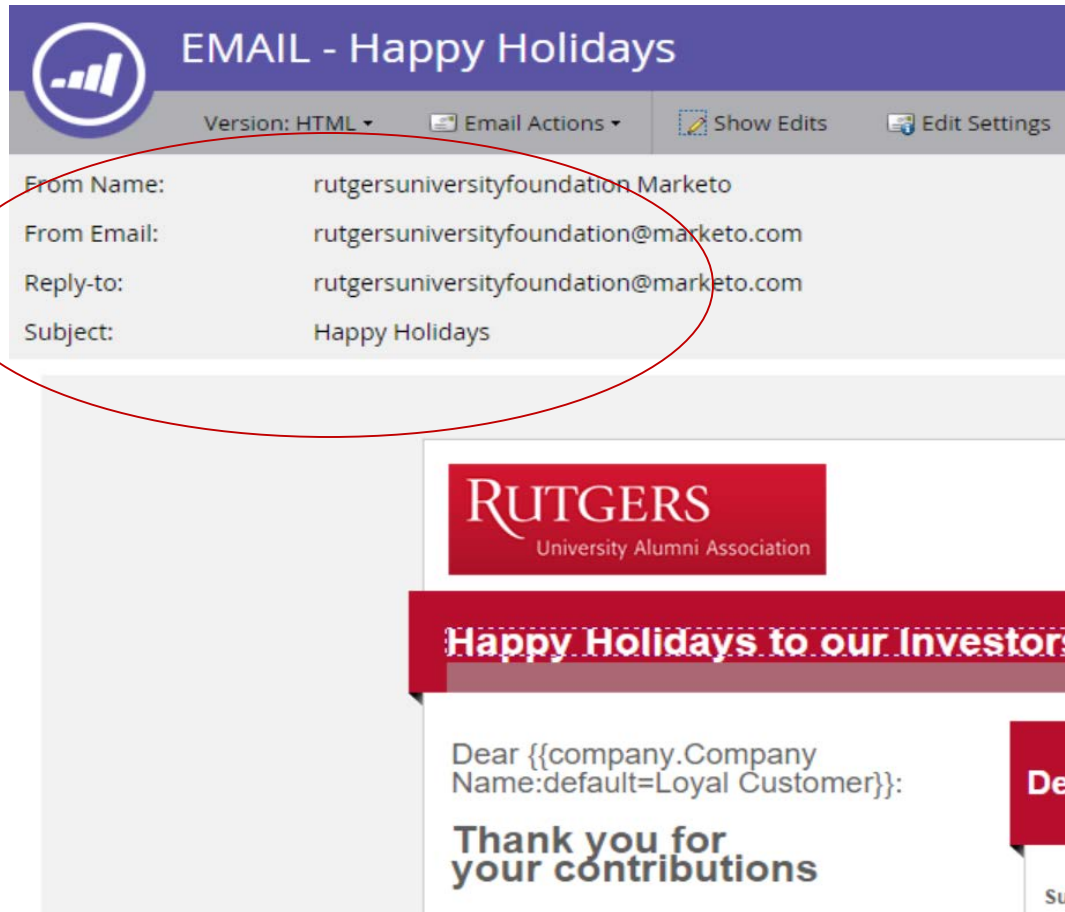
Naming your email according to Marketo Best Practice



The screenshot shows the 'New Email' form in Marketo. The form has a dark teal header with the title 'New Email' and a close button. Below the header, there are four main sections: 'Folder', 'Name', 'Description', and 'Template'. Each section has a red asterisk icon to its left. The 'Folder' dropdown is set to 'Global Emails'. The 'Name' dropdown is set to 'EMAIL - Happy Holidays'. The 'Description' text area contains the text 'Happy Holidays to our customers'. The 'Template' dropdown is set to 'Banner with Sidebar'. Below the template dropdown, there are two checkboxes: 'Operational Email (Bypass Unsubscribe / Marketing Suspended)' which is unchecked, and 'Open in editor' which is checked. At the bottom of the form, there are two buttons: 'CANCEL' and 'CREATE'.

- Select a folder in which to store your new email
- Name your email an internal email. This is not your subject line.
- Add a description to your email
- Select a template
- Check “Open in editor”
- Click “Create”

Step 1: Edit from, reply-to, and subject



EMAIL - Happy Holidays

Version: HTML | Email Actions | Show Edits | Edit Settings

From Name:	rutgersuniversityfoundation Marketo
From Email:	rutgersuniversityfoundation@marketo.com
Reply-to:	rutgersuniversityfoundation@marketo.com
Subject:	Happy Holidays

RUTGERS
University Alumni Association

Happy Holidays to our Investors

Dear {{company.Company Name:default=Loyal Customer}}:

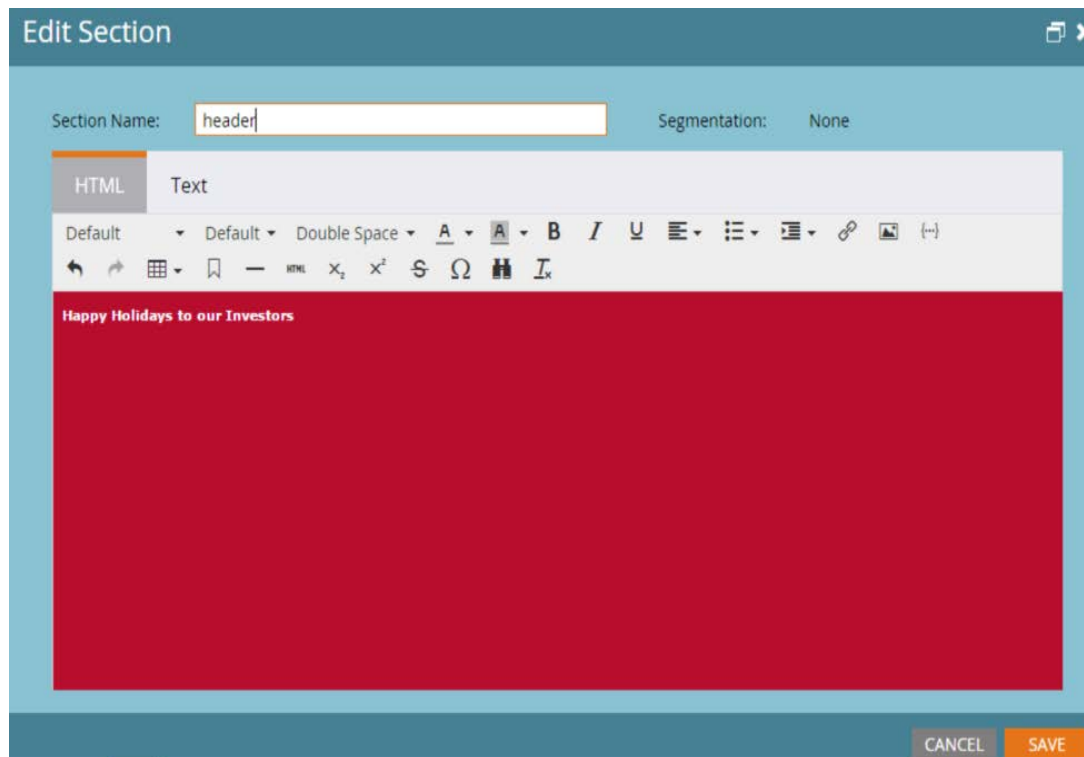
Thank you for your contributions

Dec

Sub

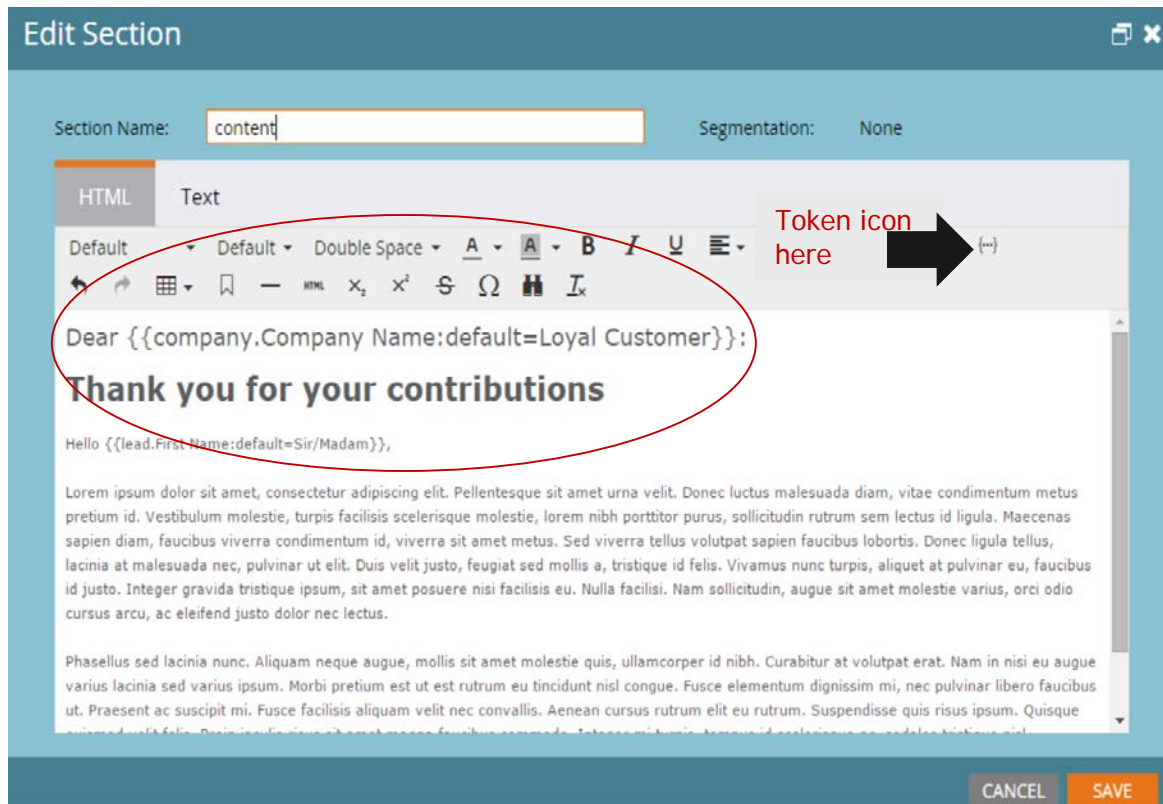
- Edit the “From Name, From Email, Reply-To, and Subject” for your email

Edit the various header sections in your email



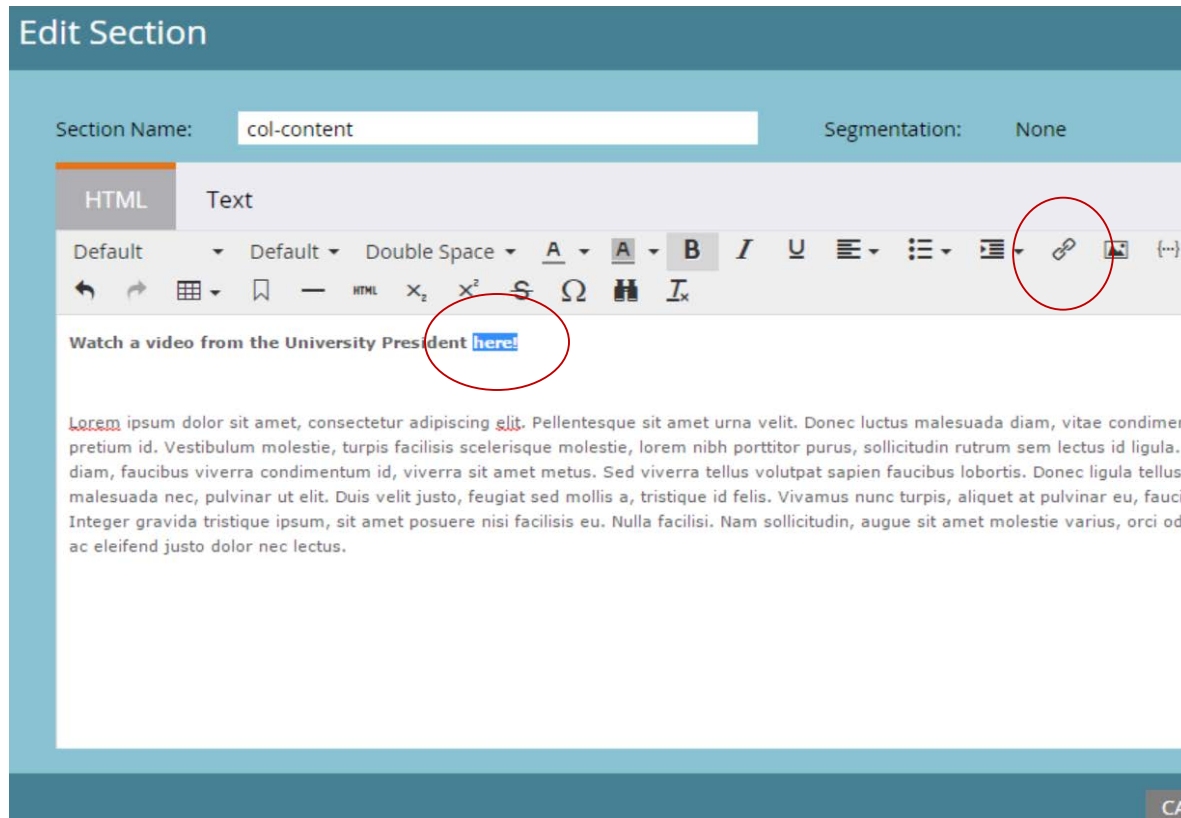
- To edit sections within your email template, simply double click on the section, and edit the text to customize

Next, edit the content in your email and add tokens if necessary



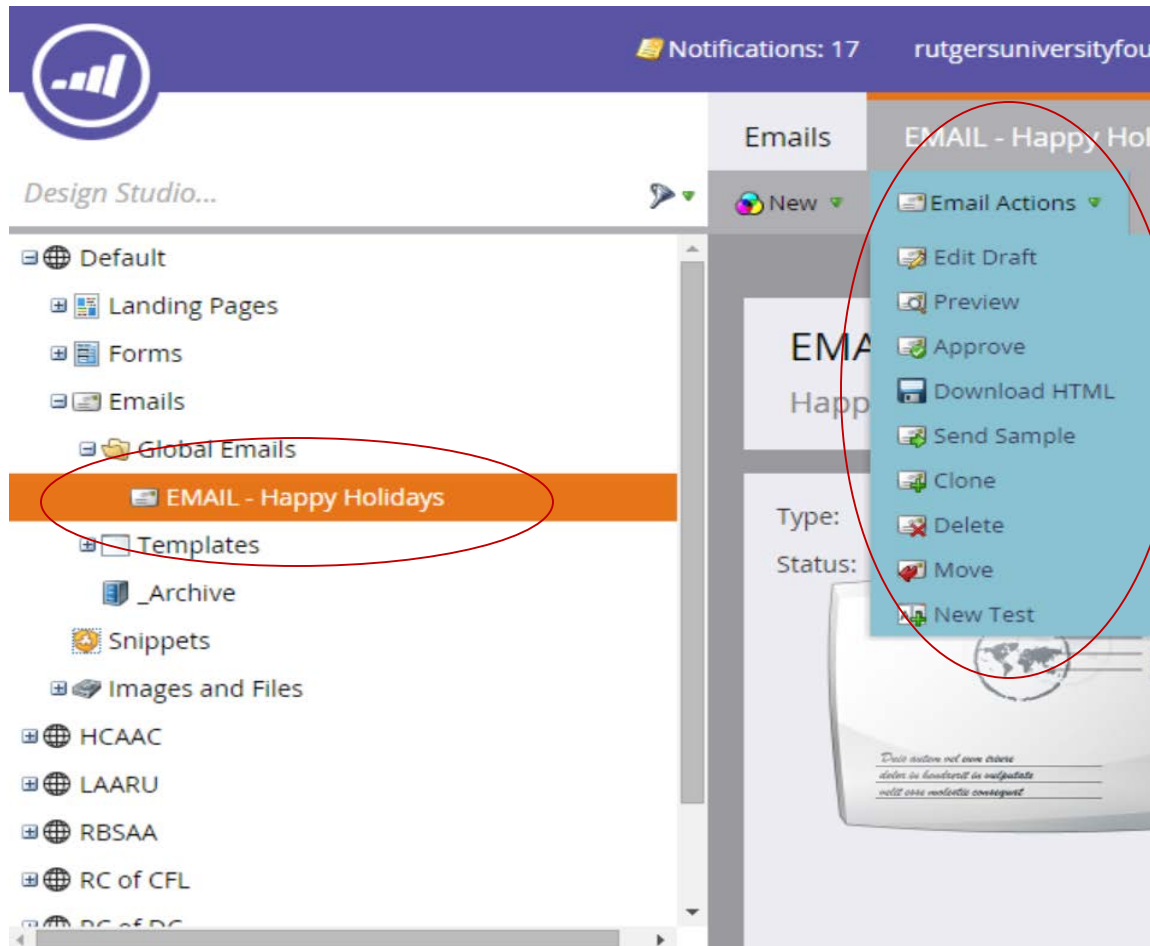
- Edit the various sub headers and content of your email and add tokens by clicking on the token icon
- A "token" is a stand-in phrase in brackets that

Adding a link to your email is simple



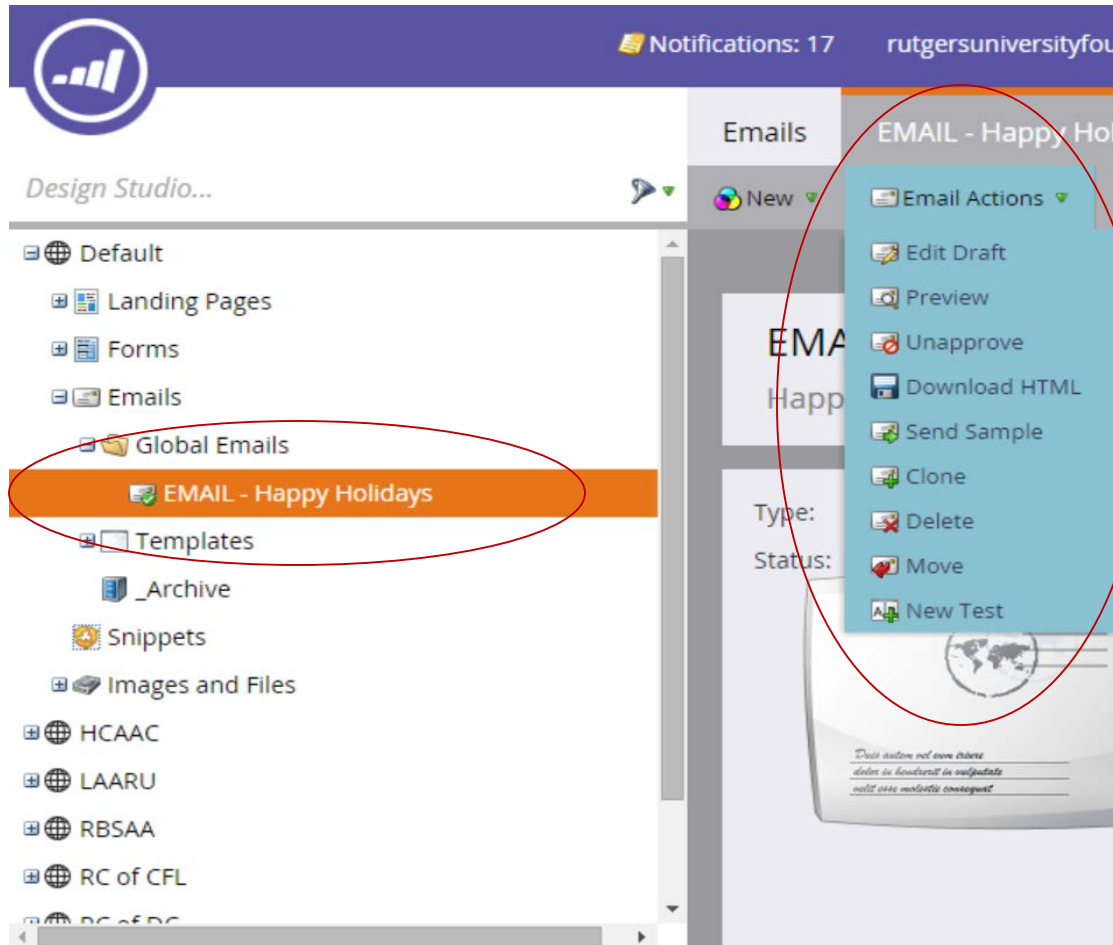
- To add a link to your email, highlight the word to hyperlink and click the link icon
- Copy and paste the link into the window

To approve your email, save your draft and exit the editor



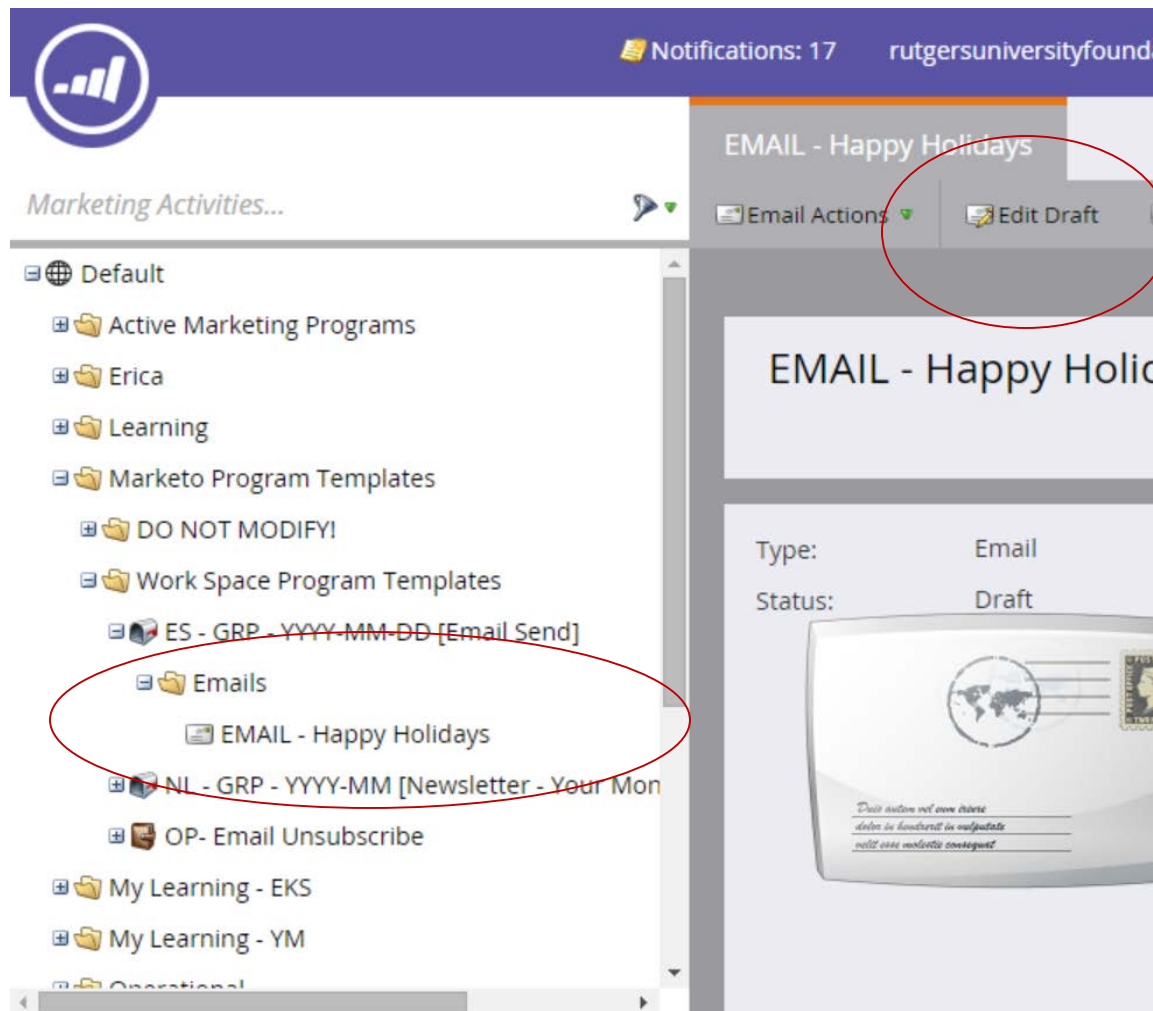
- Click on your email in the tree
- Click “Email Actions” and select “Approve”

To unapprove your email, simply follow the same steps and select “Unapprove”



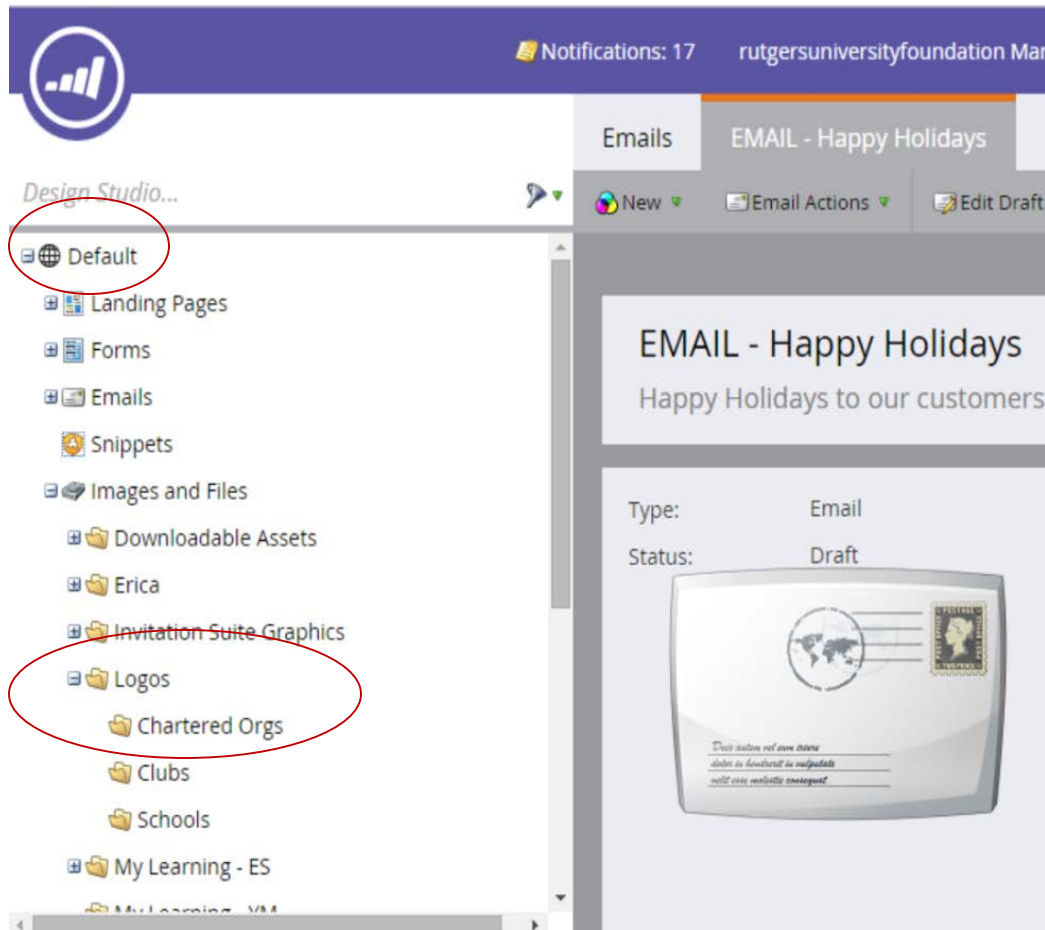
- Click on the email you want to unapprove
- Select “Email Actions”
- Click “Unapprove”

To edit an existing email:



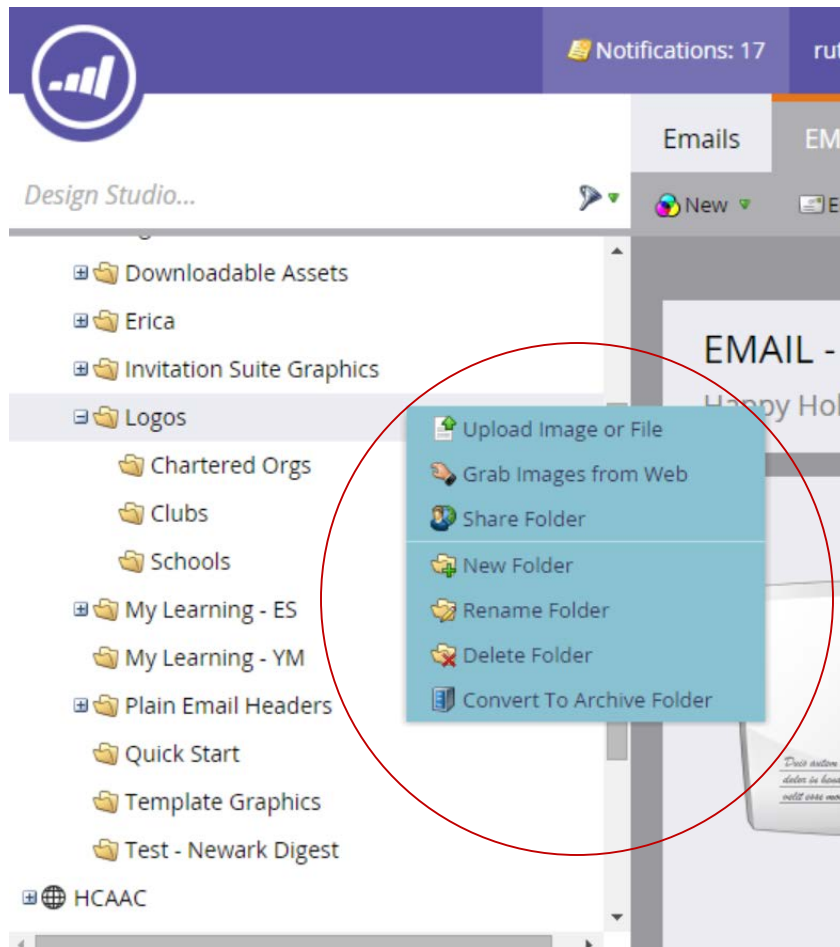
- From your program, select the email you would like to edit
- Click “Edit Draft”

To add new images/logos, navigate to Design Studio refer to “Images & Files”



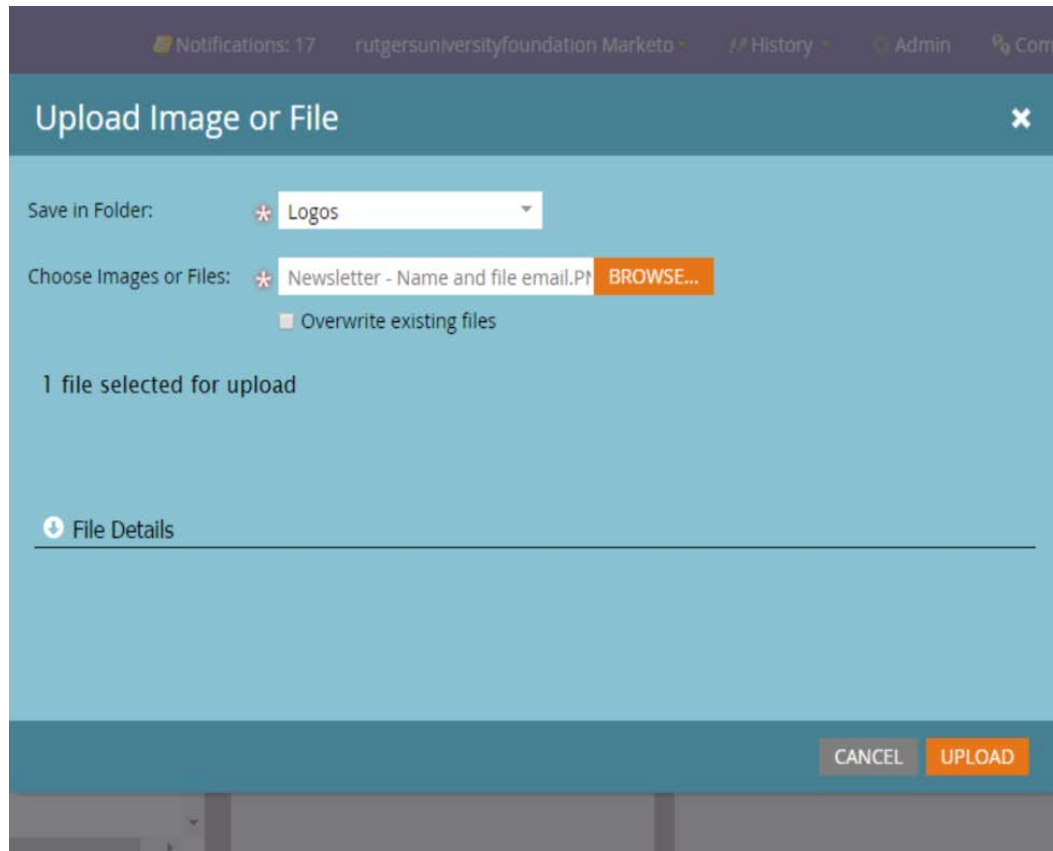
- Click on the purple power ball in top left corner
- Click on Design Studio, expand “Default” in tree
- Expand “Images and Files”
- Select folder to store your new image

Right click the folder to add new images



- Right click the folder you would like to add your image to
- Select if you are uploading a saved image or if you are copying an image from a website

Upload and save your new image



- Confirm the folder in which you will save your image
- Browse your computer for the image you would like to upload
- Click “Upload”

Links to help you create and execute a Newsletter program

- [Create](#) a new email
- Edit your email [header](#)
- Edit [text](#) in your email
- Edit your email's [HTML](#)
- Add [tokens](#) to an email link
- Add [images and files](#) to Marketo
- [Approve](#) your email