Email template creator's checklist

Are you creating a new email template with Custobar's email template designer? Here's a minimum list of things you need to check!

Template images

Upload your brand images into the media library. You can find the Media library in Custobar in the main navigation, under Campaigns.

- ☐ Logo image
- ☐ Hero image
- ☐ Favorites icon aka favicon
- ☐ Social media icons (optional, if you wish to use a specific set of your own icons)

Copy the url of each of the images and note them down to update them into the email template later on.

Template colours

When you start creating your email templates, you will probably want to change the email background and font colours the least. For this, you will need the hex colour codes of the colours you aim to use.

The hex colour codes might be available in your brand book, email template design or you can pick a hex colour code online. A hex colour code consists of a hashtag and six numbers, e.g. #040404.

Find out and note down the hex colour codes for

- ☐ Email background
- ☐ Module (content area)
- ☐ Body text
- ☐ Price (of a product) text
- ☐ Normal price text (as opposed to sale price)
- ☐ Headings 1-4 (these can all be different)
- ☐ Button
- ☐ Button text
- ☐ Link

If you are not sure about the colours at this stage, you can always test different colours when you are editing the template. All you will need is the hex colour codes.

Change email template settings within the designer

In Custobar, go to Settings -> Content templates -> Email template designer -> Choose the template you want to edit, and continue from there.

Base template

It's best to start editing the email template by changing the base template settings. Doing this will give the default settings for the whole template and all modules, after which you can customise specific modules to your liking.
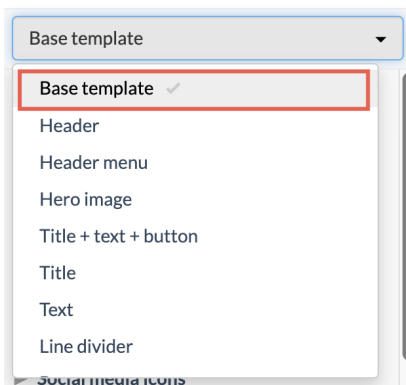
☐ **Template -> Language.** Set the language you will be writing your emails in. This makes a difference if you have products available in multiple languages. Filling up the sender details is optional at this point.

☐ **Canvas -> Canvas background.** Set the background colour for your email. Use the hex colour code you noted down earlier.

☐ **Company details -> Company name.** Update the name of your company into this field.

☐ **Company details -> Website url.** Update the website url address of your company into this field.

☐ **Company details -> Favorites icon url.** Set the favicon image for your email. Use the url address you noted down earlier.

☐ **Company details -> Hero image url.** Set the hero image for your email. Use the url address you noted down earlier. This is optional. Hero image can be updated also in the campaign editor every time you edit a campaign.

☐ **Header -> Logo image url.** Set the logo image for your email. Use the url address you noted down earlier.

☐ **Social media icons.** Update the url address of each social media to point to your own social media account.

☐ **Social media icons.** Optional. If you wish to use a different set of icons, update the url address of the social media icon image. Use the image url addresses you noted down earlier.

☐ **Social media icons -> Icon size.** Optional. Adjust the icon image size to suit your design.

- ☐ **Footer -> Has footer menu.** Turn off or keep on. If you choose to keep the menu, update the link texts and url addresses to point to your website.
- ☐ **Footer -> Footer html code.** Update or remove the footer html code to suit your needs. The minimum changes required are to replace the "help@example.org" email address with your company's email address (two times), and the "https://www.example.org" url address with your company website address.
- ☐ **Footer -> Text before unsubscribe link.** Update the text. You may also leave this field empty.
- ☐ **Footer -> Unsubscribe link text.** Update the link text. This link will take your customer to a page where they can unsubscribe from the newsletter.
- ☐ **Footer -> Text after unsubscribe link.** Update the text. You may also leave this field empty.
- ☐ **Footer -> Extra copyright row after footer.** Update the text. You may also leave this field empty.
- ☐ **Module -> Background color.** Set the background colour for all of your modules. Use the hex colour code you noted down earlier. Note! You can customise the colour of each individual module later on. Customisation will always override this colour option.
- ☐ **Body text font -> Font family.** Choose the font you want to use in the body text of your email.

  Body text font -> Text colour. Set the body text colour for your email. Use the hex colour code you noted down earlier.
- ☐ **Product -> Product fields.** Select what product information you want to automatically show when you drag products into your email campaigns.
- ☐ **Price -> Font family.** Choose the font you want to use in the body text of your email.
- ☐ **Price -> Text colour.** Set the price text colour for your email. Use the hex colour code you noted down earlier.
- ☐ **Price -> Normal price colour.** Set the normal price colour for your email. Use the hex colour code you noted down earlier.
- ☐ **Heading 1 -> Font family.** Choose the font you want to use in the Heading level 1 of your email.
- ☐ **Heading 1 - > Text colour.** Set the Heading level 1 colour for your email. Use the hex colour code you noted down earlier.
- ☐ **Heading 2 -> Font family.** Choose the font you want to use in the Heading level 2 of your email.
- ☐ **Heading 2 - > Text colour.** Set the Heading level 2 colour for your email. Use the hex colour code you noted down earlier.
- ☐ **Heading 3 -> Font family.** Choose the font you want to use in the Heading level 3 of your email.
- ☐ **Heading 3 - > Text colour.** Set the Heading level 3 colour for your email. Use the hex colour code you noted down earlier.
- ☐ **Heading 4 -> Font family.** Choose the font you want to use in the Heading level 4 of your email.
- ☐ **Heading 4 - > Text colour.** Set the Heading level 4 colour for your email. Use the hex colour code you noted down earlier.

☐ **Button dimensions -> Button colour.** Set the button colour for your email. Use the hex colour code you noted down earlier.

☐ **Button text -> Button text colour.** Set the button text colour for your email. Use the hex colour code you noted down earlier.

Button text -> Default text. Set the default text for your buttons. The text can be edited later when creating the campaign.

☐ **Link -> Link colour.** Set the link colour for your email. Use the hex colour code you noted down earlier.

Customise specific modules

After you're done with the base template settings you have the chance to customise any of the modules in your email template. You can adjust their colours and fonts or what content is shown in them (product modules).

Check especially that you're happy with how your product modules look like. Those are the modules where you will be dragging your products into when creating campaigns.

Here's a list of all the product modules:

☐ Title + text + button
☐ Image + text
☐ Text + image
☐ Product x 2
☐ Product x 3
☐ Product x 4

Note that you can move, copy and delete modules from the three icons in the top right corner. We only recommend deleting modules if you have a specific need for a certain structure as **when you delete a module you will lose access to that module**. The only way of getting the module back is to not save the template

Copying modules can be used to create two modules with different