

HOW TO / create a marketing piece (how to create a marketing piece 1/3)

We are so excited that you would love a quick step by step guide on how to create a marketing piece. Please follow the directions below:

TEMPLATE SELECTION

1. From your “Marketing Materials” page, please click the green link that says “Create a New Marketing Piece.”



2. This brings you to a new page where you see all available templates on the right and filters by which you can search on the left.

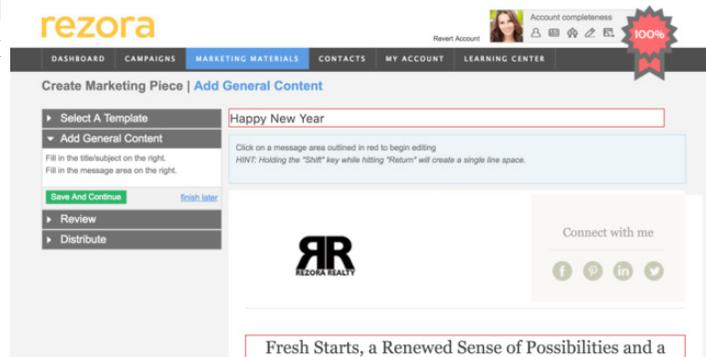
3. Once you know what type of marketing piece you would like to create, you are ready to search by filters and choose a template. I believe the most helpful filters by which you can search are located below the “More” button (located at the bottom right corner of the “Select a Template” box). Please click the “More” button and then slide the bars below each filter to the desired spot (it goes from no preference, to zero, one or more, etc.).

4. As you slide the various filter bars, the templates that fit within your parameters display on the right. Feel free to use your mouse to hover over the available template before you select it and see the list of its attributes. You can also preview the template layout to ensure that you would like to use the template before you start the creation process.

TIME TO CREATE YOUR MASTERPIECE:

5. When you’ve found your favorite template layout, please click directly on the template and you are ready to get started!

6. On the left side of your page you will see various steps in which you can click through at anytime. What you will first be asked to do though, in most cases, is add in a subject line/title. Remember, make it catchy and try and avoid “spammy”. When I say “spammy” I mean stay away from extreme CAPS LOCK, symbols (\$\$***), and excessive “!!!!!!”.



7. Go through each step on the left in any order you wish. Please be mindful though of the amount of time that you spend on each step. I recommend clicking between steps or pressing “Save and Continue” every 20 minutes or so. This ensures that your work is saved and you won’t have to start from scratch.

