HindSite Connect:
Template Building

(Revised 3/2017)

HindSite Connect

When you are first setting up HindSite Connect, you are given a set of standard templates to help you with basic emails. These include, but are not limited to, appointment reminders, appointment confirmations, appointment cancellations, and emails pertaining to specific services.

While these are a great set of basic emails to have on hand, we at HindSite understand that every company is different and has different needs. Whether you simply would like an email reworded, or are looking to have a completely new template design, this document will show you how to create your own templates to be used in HindSite Connect.

Follow the instructions below to get started making your own HindSite Connect templates today.

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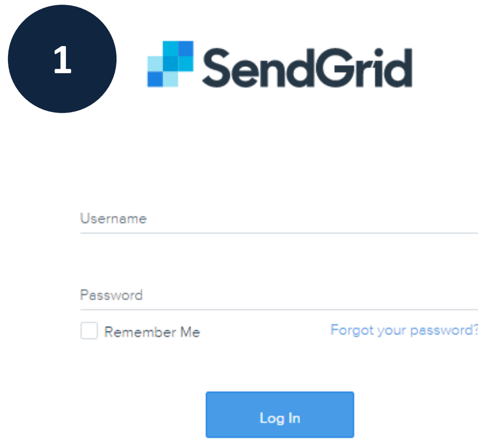
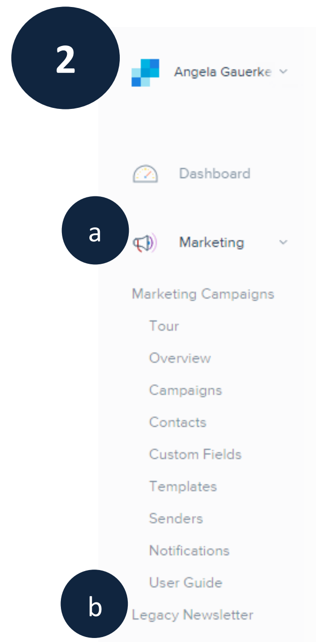
Editing a Template

Let’s say you want to make minimal changes to an already existing template. This is a very simple process which you can do completely on your own! No need to call support and connect with somebody. Here’s how:

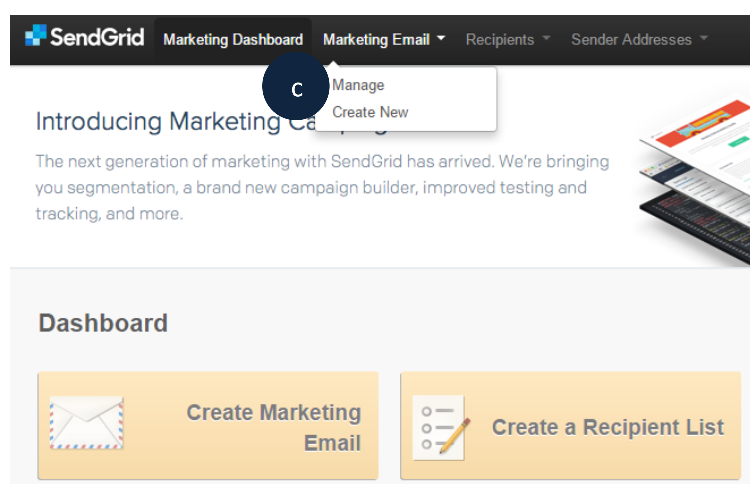
1. **[Log in to SendGrid]**



2. Once logged in, find the template you wish to make edits to
   a. To get to your templates, click on Marketing from the side menu
   b. Select Legacy Newsletter from the Marketing drop down list



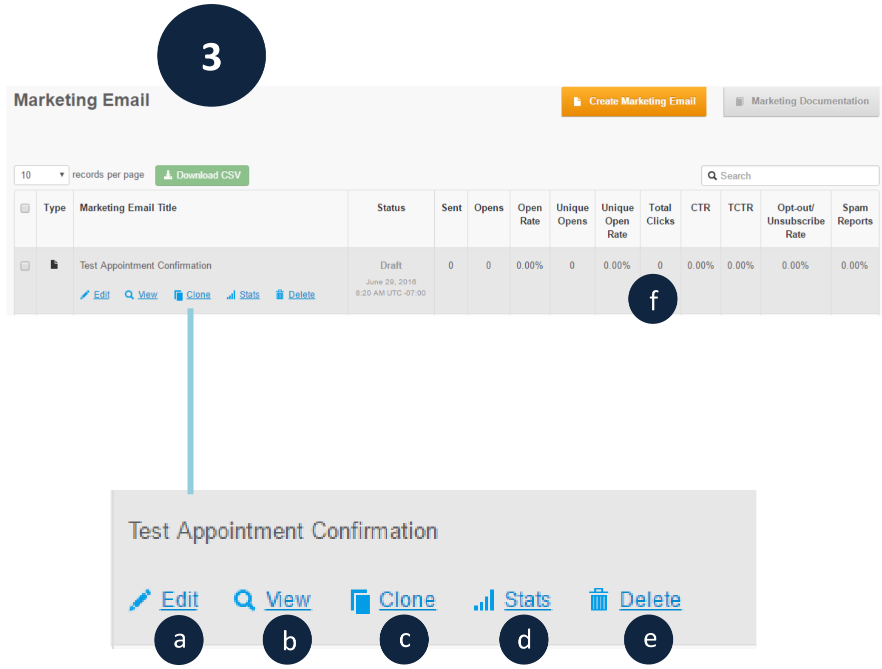
   c. Click on Marketing Email in the menu bar at the top of the screen and select Manage from the drop down options.



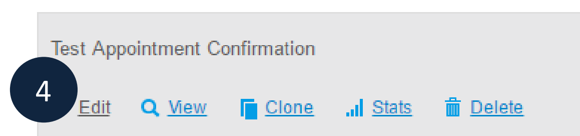
Editing a Template Cont…

3. The Marketing Email page will open up allowing you to see all of your email templates. By hovering over the email template, you have a few different options:

    a. Edit – Allows you to make edits to your existing email template.
    b. View – Allows you to preview your email template.
    c. Clone – Allows you to make a copy of your email template (Useful for copying the look of the email while having the ability to change the content).
    d. Stats – Will not apply to HindSite Connect. Please refer to HindSite's Dashboard for statistics relating to your emails.
    e. Delete – Allows you to delete email templates that you no longer want or that are no longer useful to you.
    f. The statistics located to the right of the template name will not apply to the sending you do out of HindSite Connect. These can be ignored.



4. Hover over the template name you would like to edit and click Edit to begin editing.



Editing a Template

5. On the editing screen, you will find different features and functionality
   a. Subject – This will be displayed in the email subject that your customer receives.
   Please Note: You can leave the subject blank and this brings up the option to type in a subject in HindSite before sending. This is useful if you need to change the subject with each email sent.

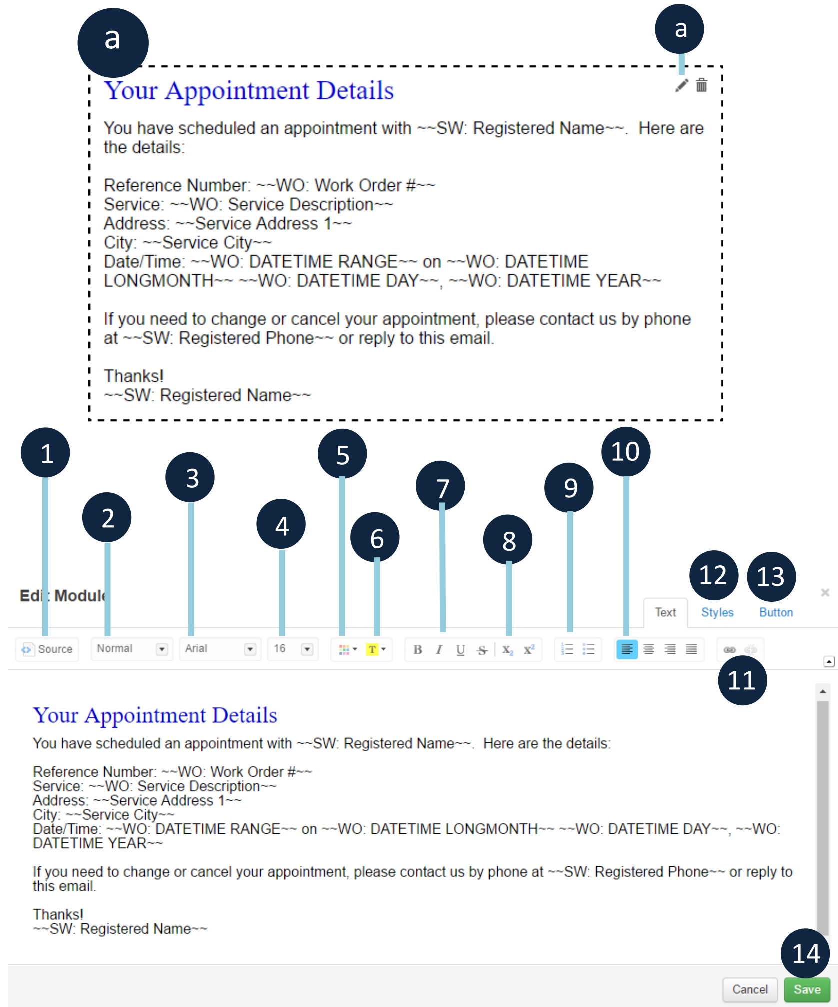
   b. Save to Templates – This will save your templates into a folder. The best use for this is if you have a template design you like to use a lot and would want easy access to.
   c. Check SPAM Score – This will check the email template to see where it ranks as far as being read as SPAM by your customer's email providers.
   Please Note: This score is not a guarantee one way or another that your email will be delivered or blocked by SPAM filters. It simply checks to see for main factors that can cause an email to go to SPAM.

   d. Preview – This allows you to preview what your email will look like to the person receiving your email
   Please Note: The HindSite specific variables (i.e. ~~First Name~~) will not appear in the email until it is sent through HindSite where it pulls that information.
   e. Send a Test – This will send you an email of the template. It is the same as your preview, just emailed to you directly.
   f. Modules – These are the components that can be dragged and dropped into your email template. If you ever needed to add an extra text box or image, this is where you can do it.
   g. Style – Style controls the basic look of the email. You can set the background color for the page and the body as well as set the color and width of the border. These can help to personalize your emails or set a theme for the email.
   h. Image Library – This will store all of the images you have uploaded into your SendGrid account. You can drag and drop these images right into the email template.
   i. Custom Tags – Custom Tags **will not** work when sending from HindSite Connect and can be ignored.

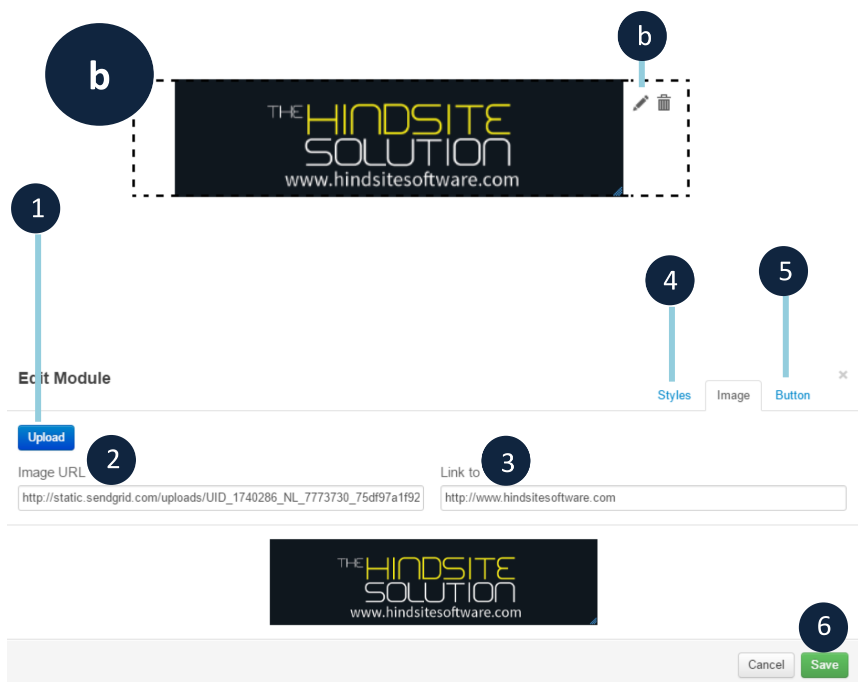
Key Email Editing Tips

You have many options when it comes to editing a template for it to look the way you would like. Below are some key editing tips that you will most use:

a. Editing a Text Module – To edit a text module, hover over the module and click the pencil icon. This will open many editing options for your text:
   1. Source – This will provide you the HTML of the email template.
   2. Format – This will format the text in the email.
   3. Font Type – This will allow you to select different font types.
   4. Font Size – This will allow you to select different font sizes.
   5. Font Color – This allows you to change the font color.
   6. Background Color – This allows you to change the background color of the text.
   7. Font Styles – This allows you to Bold, Italicize, Underline or Strikethrough your text.
   8. Script – This allows you to Subscript or Superscript your text.
   9. Lists – This allows you to insert/remove a Numbered or Bulleted List.
   10. Alignment – This allows you to align text to the Left, Center, Right or Justify.
   11. Links – This allows you to link or unlink your text to a web address.
   12. Styles – Styles allows you to change the Background Color, Border Color and Border size of the module.
   13. Button – Button allows you to add a clickable button in to your module.
   14. Save – Remember to save each and every change!



b. Editing an Image Module – To edit an image module, hover over the module and click the pencil icon. This will open many editing options for your image:
   1. Upload – This allows you to upload your logo and photos into SendGrid.
   2. Image URL – This will fill in once an image is uploaded and is the images web address.
   3. Link to – This allows you to tie a web address to your image.
   4. Styles – Styles allows you to change the Background Color, Border Color and Border size of the module.
   5. Button – Button allows you to add a clickable button in to your module.
   6. Save – Remember to save each and every change!

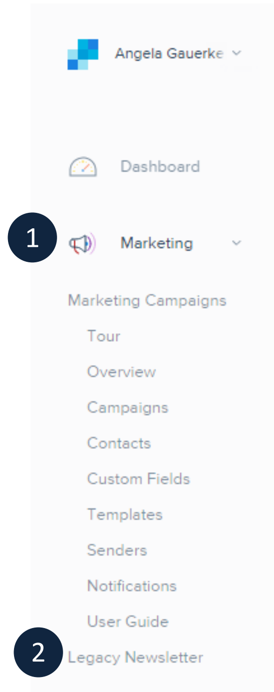


Editing a Template Cont…

6. Once you are finished editing your email:
   a. Click Save & Exit
   b. Do not worry about the Step 4 – Review & Schedule button. Emails will be sent through HindSite Connect from here on out.

7. [Review] Things to Check/Change in your Template:
   c. Did you upload and insert your logo?
   d. Did you change the divider color to reflect your company colors?
   e. Are the HindSite specific codes set up the way you like?
   f. Did you include promotional text or delete the Promotional text module?
   g. Did you link to your social media or delete the social media images that did not apply to your company?

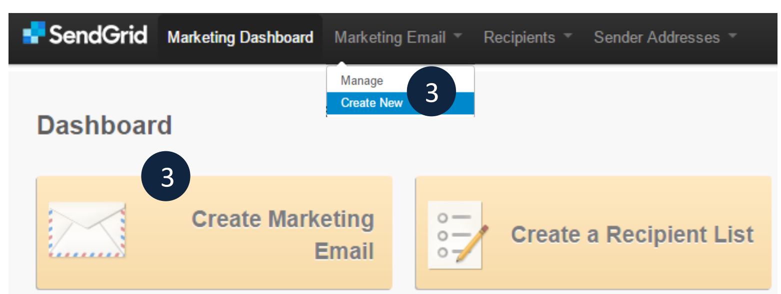
Creating a New Template



1. To start creating a new template, start at your home page in SendGrid. Click Marketing from the left-side menu

2. Select Legacy Newsletters from the Marketing drop-down

3. Create a new marketing email by either selecting Create New from the Marketing Email dropdown located in the menu bar at the top or by clicking the Create Marketing Email button located near the top of the screen.



Creating a New Template Cont…

4. You will need to title the new email you are creating.

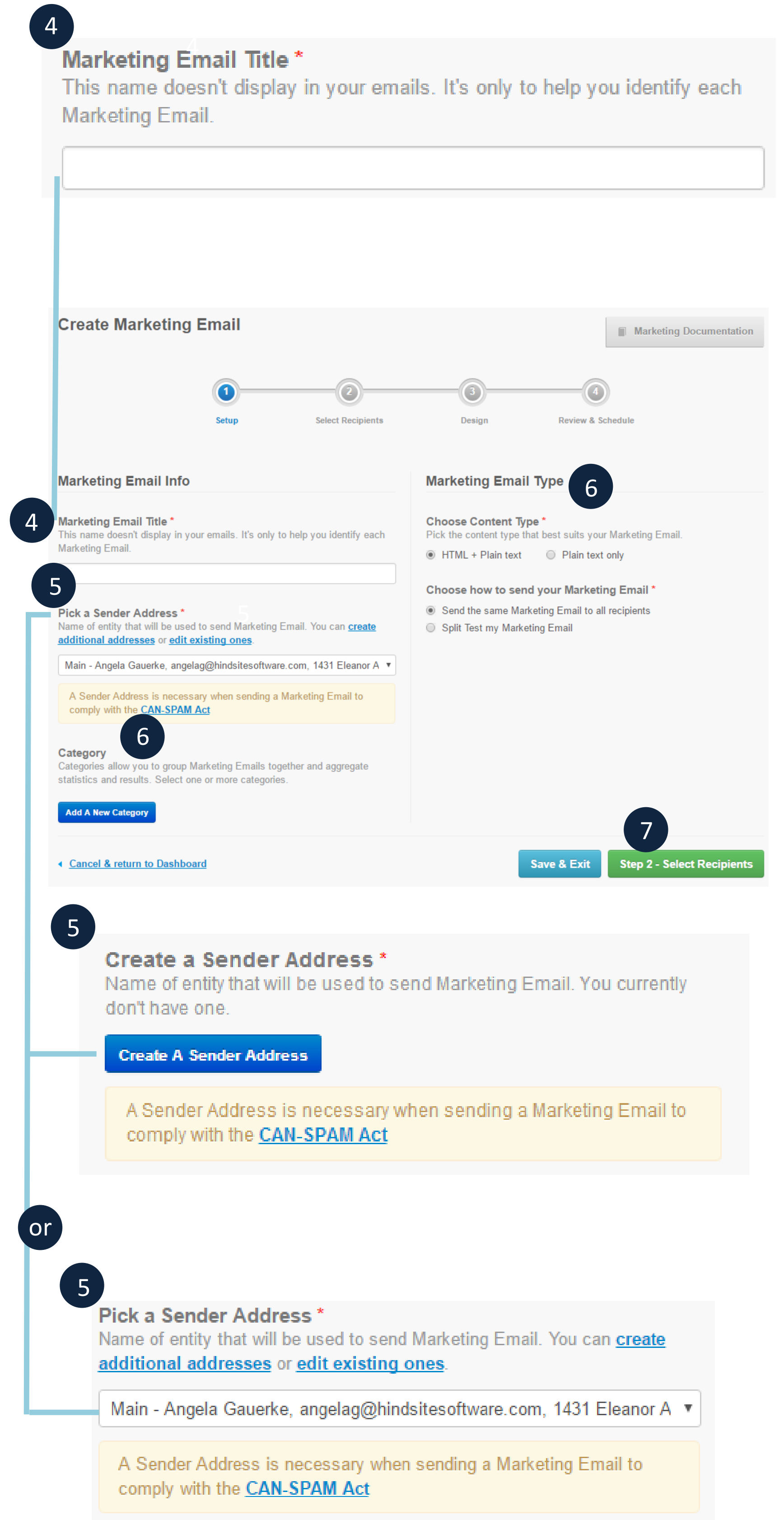
   Please Note: This is how you will identify your email when assigning it in HindSite so we suggest titling it something you will recognize.

5. Next you will need to select or create a Sender Address. You may have one available in the drop down to select, otherwise you will need to click Create A Sender Address.

   The sender address will not apply when you are sending out of HindSite Connect, it is only necessary to access template creation. In HindSite Connect you will be able to select the email address you wish to send your emails from.

6. The Category and Marketing Email Type sections can be ignored. These will not apply when sending out of HindSite Connect.

7. Next select Step 2 – Select Recipients

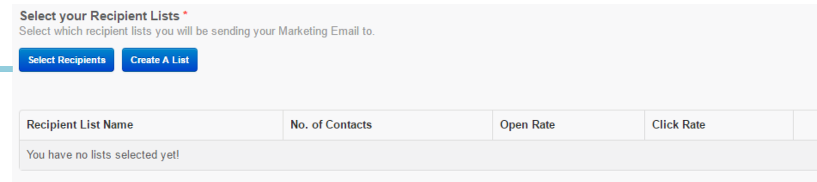


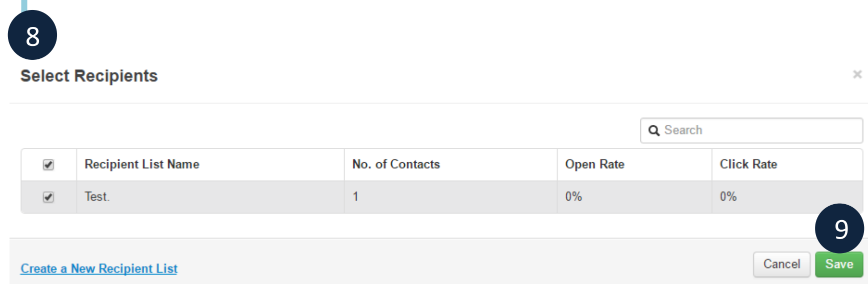
Creating a New Template Cont…

8. You must have a recipient list set up to be able to access and create templates. You may have a list available to select, otherwise you will need to click Create A List.

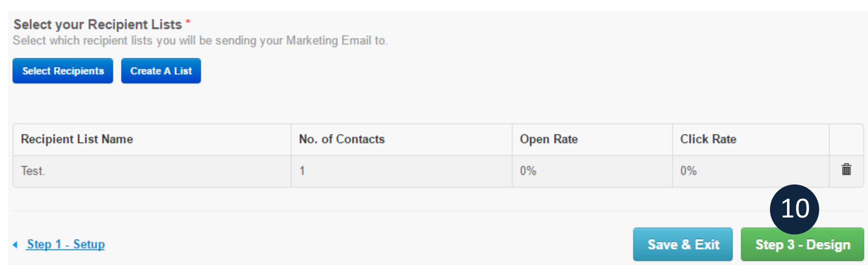
   Just like with the Sender Address, the Recipient List does not apply when sending emails out of HindSite Connect, it is only necessary to access template creation. In HindSite Connect you will be able to select the email addresses you wish to send your emails to.

   If you must Create A List, we suggest using a fake email address or your personal email address.





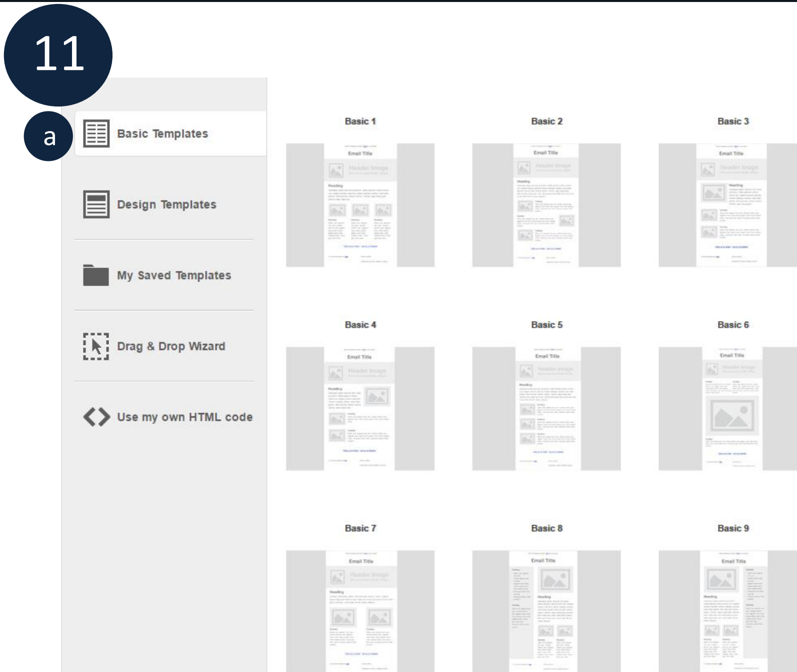
9. Once your list is selected, click Save.

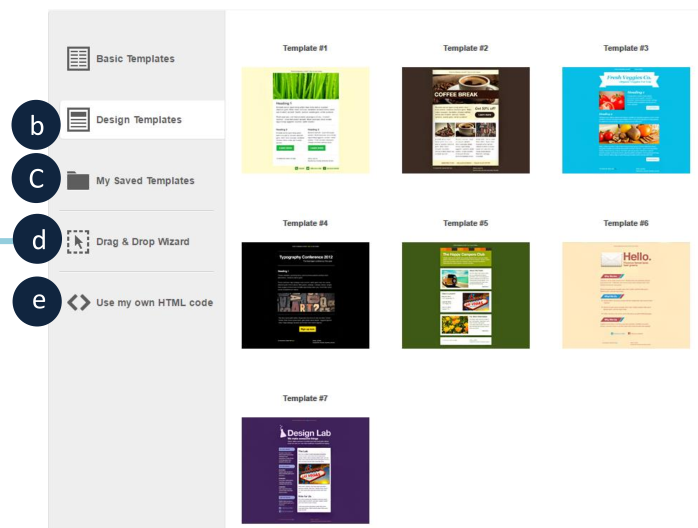


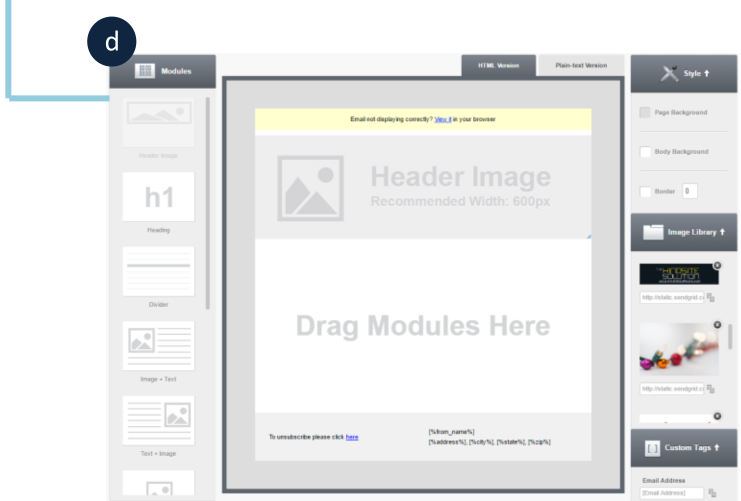
10. Click Step 3 – Design to start creating your template.

Creating a New Template Cont…

11. You will be provided with some options as far as how you would like to go about creating template designs and layouts:
    a. Basic Templates – Provides you with different layout styles for your template.
    b. Design Templates – Provides you with predesigned template styles.
    c. My Saved Templates – Stores any template designs you wish to save and reuse.
    d. Drag & Drop Wizard (Recommended) – Allows you to drag and drop modules into a template.
    e. Use my own HTML code – Provides you with the ability to create templates using HTML code.

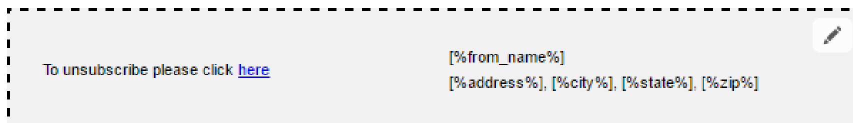






Important Compliance Setup – CAN-SPAM Act

The CAN-SPAM Act of 2003 is a law that sets the rules for commercial email, establishes requirements for commercial messages, gives recipients the right to have you stop emailing them, and spells out tough penalties for violations.



One main compliance for the CAN-SPAM Act is to have a valid Sender Address. Another is to ensure that your contacts can unsubscribe from your emails. To follow these requirements, you must leave the bottom module that SendGrid automatically puts in to each email, as is. **Please do not change anything in the module, as HindSite needs this to follow the CAN-SPAM Act.**

Creating a New Template Cont…

12. Once your template is created, click Save & Exit

13. Step 4 – Review & Schedule can be ignored. You will view a preview and send your email out of HindSite.

Congratulations!

You are now able to edit any existing templates you have and also create brand new ones.

You now have the skills to:

- Make minor edits to existing templates.
- Create entirely new templates and customize them with themes, designs, and layouts.
- Add images.
- Change font text, color, and size.
- Change logos and headers.
- Add in social media links and special promotional offers and coupons.
- Drop in any HindSite specific text you'd like to ensure your customers receive the information they need for their appointment.

If you have any additional questions, please contact your HindSite Prof today. And don't forget about the additional resources that are available:

- **HindSite Connect FAQ's**: Look up questions commonly asked by HindSite Connect users. You will also find a list of the HindSite specific text that can be dropped in to your emails here.

- **Setting Up HindSite Connect**: Learn how to set up HindSite Connect in your HindSite program. Besides the basic set-up, and can also see how to change who emails come from and add new users to the program.