

Flodesk How To's:

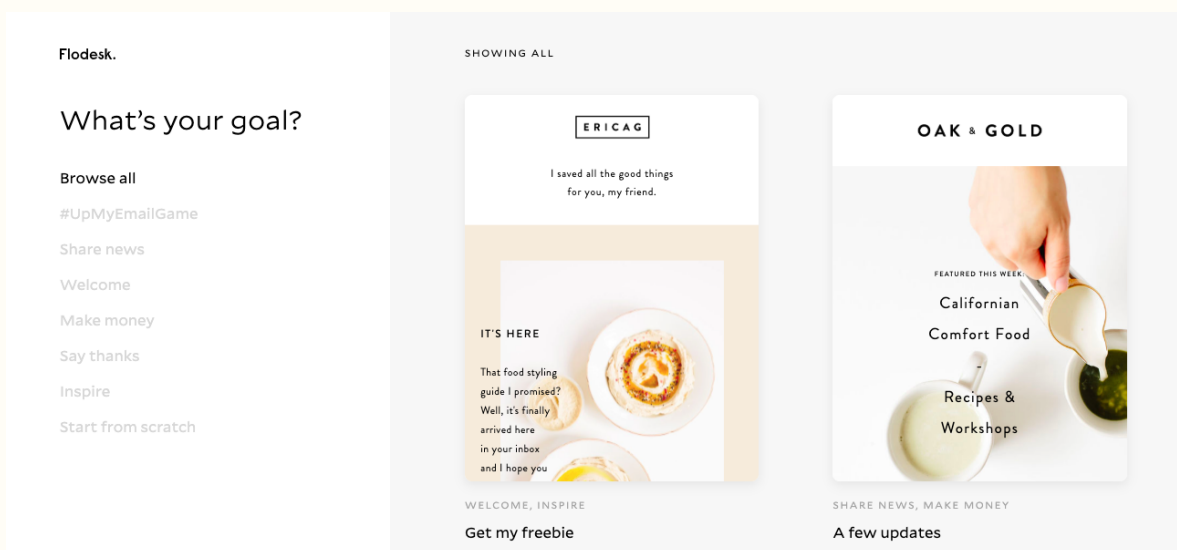
Username: insert here

Password: insert here

Designing an Email

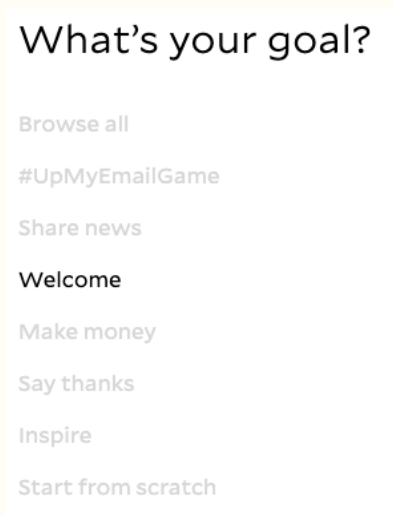
Step 1.

Let's start in the Flodesk template gallery (if you're not there, go to Emails in the top menu > Create new.



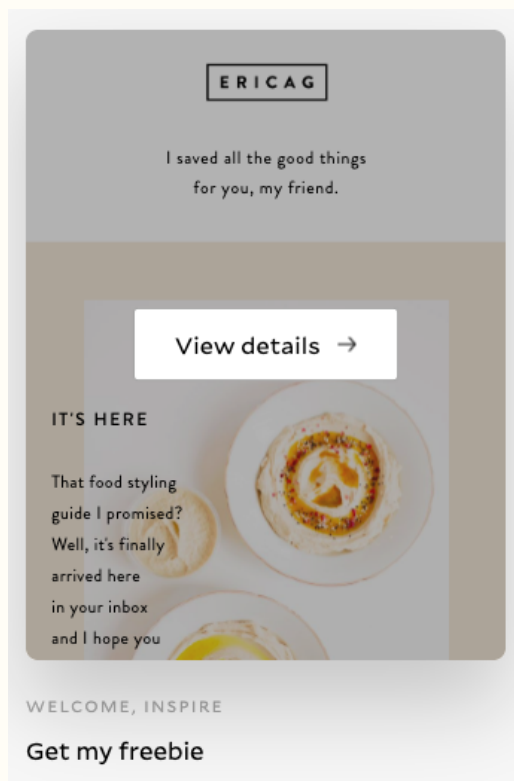
Step 2.

Click on the Welcome category on the left side to narrow it down.



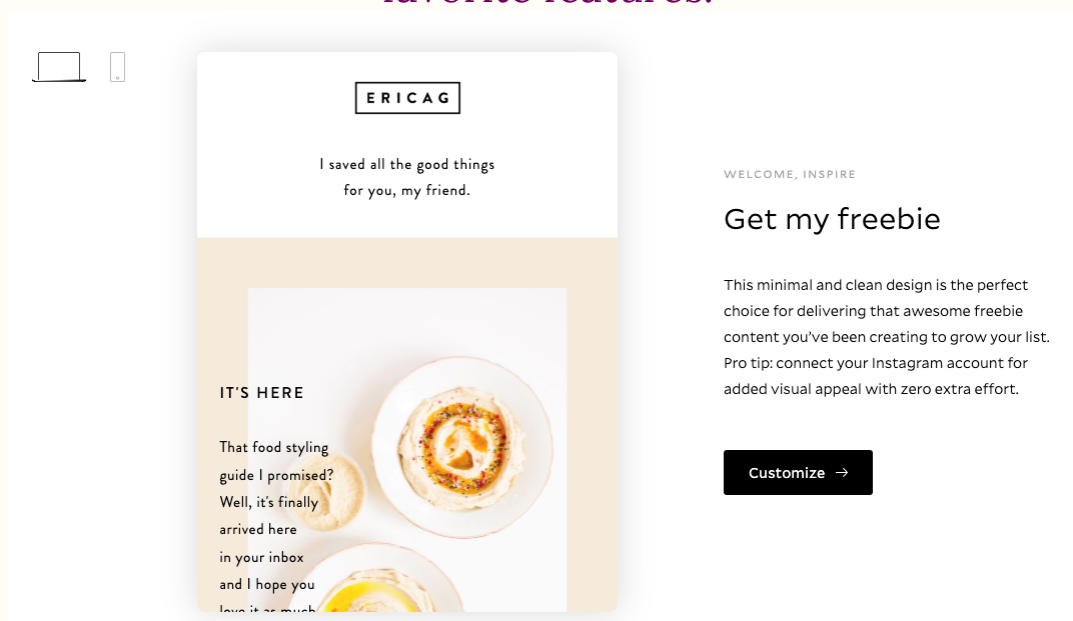
Step 3.

Choose a template you love and click on View details to learn more about when to use this template.



Step 4.

Make sure to preview on mobile and desktop, it's one of our favorite features.

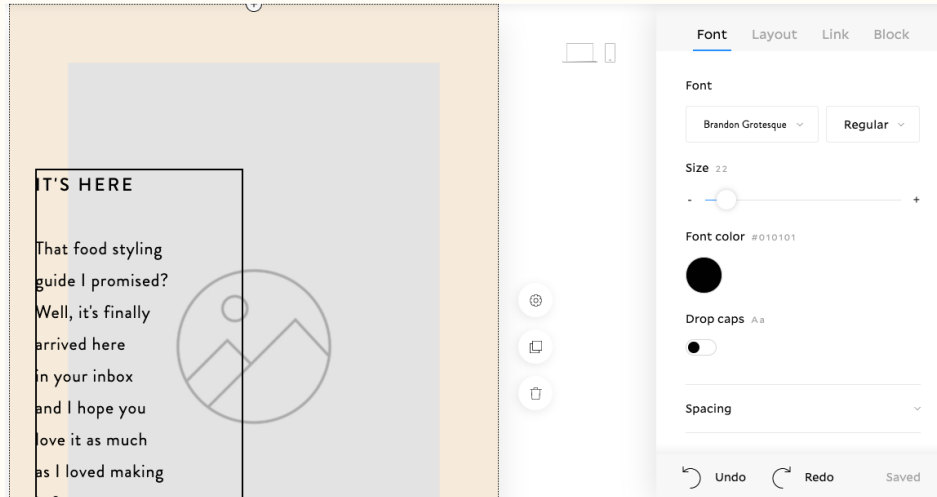


Step 5.

Click on Customize to start making it your own!

Step 6.

Click on any part of the email to start editing—the tabs on the top right of the let you navigate through the settings bar. Use the icons to the right of each block to easily access block settings, duplicate, or delete a block.



Step 7.

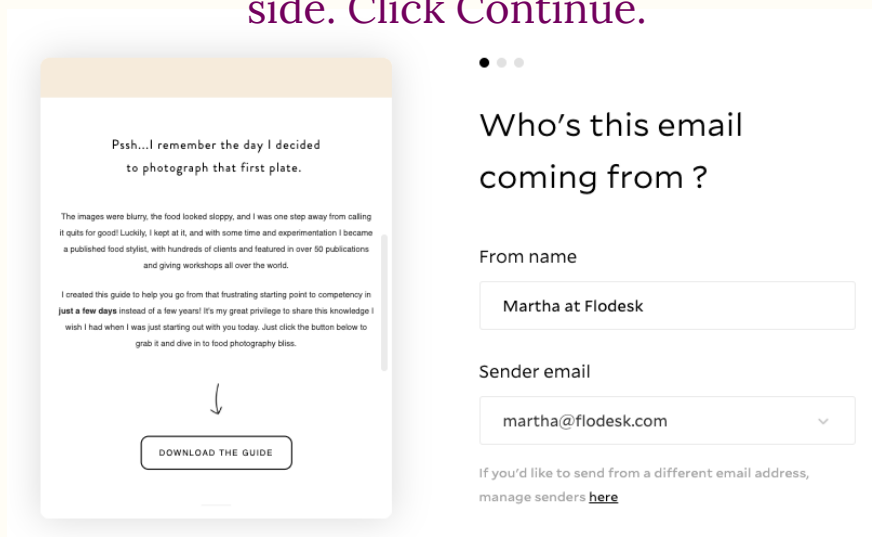
When you're ready to send, click Next on the top navigation flow. You'll be able to choose your sender profile, subject line, preview text, send time, and more in the next few screens.

CHOOSE TEMPLATE > DESIGN EMAIL > CHOOSE AUDIENCE > SEND

Next →

Step 8.

Choose your sender profile (who this email is coming from) and make sure to preview the email in the thumbnail image on the left side. Click Continue.





Step 9.

Choose your subject line (go ahead, add an emoji if you wish—we do all the time) and preview text. Your preview text is the snippet that appears after your subject line in most email programs. Click Continue.

A screenshot of an email editor interface. At the top, it says "Write your subject line." Below this is a text input field with the placeholder text "Subject line" and the content "Your freebie inside" followed by a yellow smiley face emoji. Below the subject line field is a "Preview text" field with an information icon. The preview text field contains the text "Your ultimate guide to everything you need to know about life and funky-town". At the bottom right of the preview text field, it says "14 characters remaining".

Step 10.

If you've already added your segments into your Flodesk account (woo you!) then click on +Add segments to choose your recipients by segmented groups.

If you haven't added segments yet, you can add individual emails. You can also click on Import CSV file to create a new segment on the go (CSV is just a fancy name for a spreadsheet that is saved in "comma separated values" format).

To save your spreadsheet in this format go to your spreadsheet program > click download or save > select CSV or comma separated values as the file type).

A screenshot of a dialog box titled "Choose your recipients." It contains three buttons: "+ Add segments", "+ Add individuals", and "Import CSV file". The "Import CSV file" button is highlighted with a dashed border and a pencil icon.



Step 11.

Select whether to send your email now or schedule it for a later time.

When should we send this email?

Your email will send in 1 hour.

Step 12.

Send or schedule and you're done! No worries if you got too eager and pressed that send button before you were ready. You have 10 seconds to hit Oops undo my send and go back to editing.



Flodesk How To's:

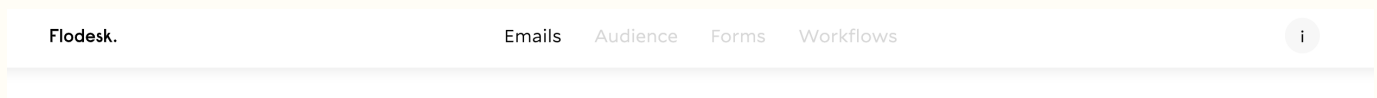
Username: insert here

Password: insert here

How to create your first workflow

Step 1.

Navigate to Workflows on the top menu in your Flodesk account.



Step 2.

Click on + Create New to start a new workflow.

Step 3.

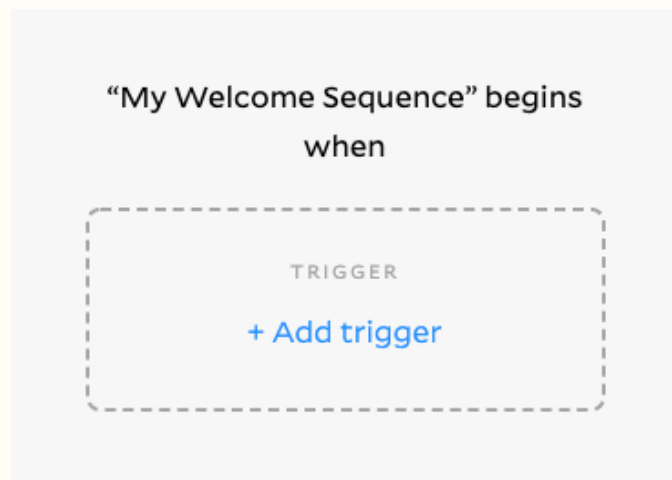
Select a template or start from scratch.

Step 4.

Name your workflow for easy access in the future.

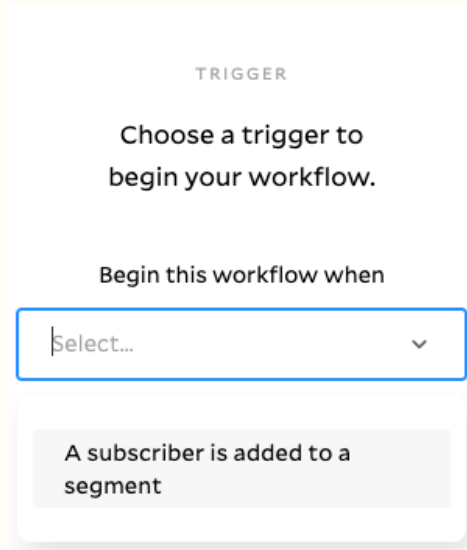
Step 5.

Click Add trigger to define what event causes your automation to begin for a subscriber.



Step 6.

Select a trigger, unless you have integrations like Shopify connected, the most commonly used trigger will be when to start an automation when a subscriber is added to a segment.



TRIGGER

Choose a trigger to begin your workflow.

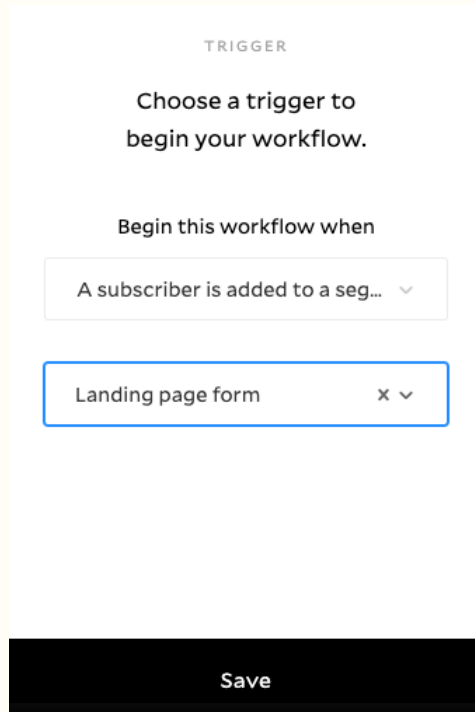
Begin this workflow when

select... ▾

A subscriber is added to a segment

Step 7.

Choose your segment and click Save.



TRIGGER

Choose a trigger to begin your workflow.

Begin this workflow when

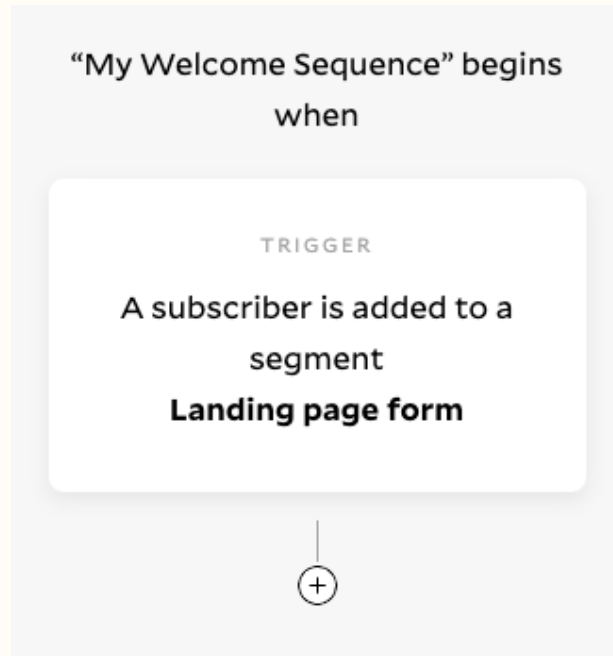
A subscriber is added to a seg... ▾

Landing page form x ▾

Save

Step 8.

Click on the + sign to add a new email, time delay or condition.



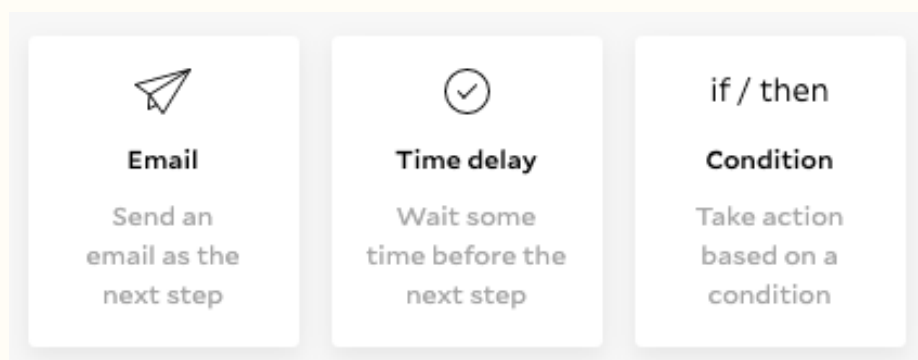
Step 9.

Click on the action you wish to add as the next step in your workflow:

Email: sends an email as the next step

Time delay: waits a number of minutes, hours, or days before the next step

Condition: lets you split your workflow and add different next step





Step 10.

When you're ready, add an email to your workflow and select whether you want to use an existing email (sent or draft email that you previously created) or create a new one now.

A white dialog box with a light gray border. At the top, it says "SEND EMAIL" in small, gray, uppercase letters. Below that, the text reads "Which email would you like to send?". There are two buttons: "Choose existing email" and "Create new email", separated by the word "or".

SEND EMAIL

Which email would you like to send?

Choose existing email

or

Create new email

Step 11.

Customize your email.

Step 12.

Select your subject line, sender profile, and preview text. Click Save when done to add this step to your workflow.

A screenshot of an email customization interface. It shows a preview of the email at the top, followed by fields for "Subject line", "Sender & preview text", "Preview text", and "Sender". A "Save" button is at the bottom.

in your inbox
and I hope you
love it as much

Subject line

Welcome to my newsletter

Sender & preview text

Preview text

So glad you're here. Here's what to expect 🍷

Sender

martha@flodesk.com

Save



Step 13.

You did it! Now click Publish now to start your automation. You can always pause or edit it in the future. Once live, you can go to your Workflows in your top menu and check insights for each automation you have published.

Let's publish your workflow.

All set to go? Click the button below
to take your workflow live.

Publish now

Flodesk How To's:

Username: insert here

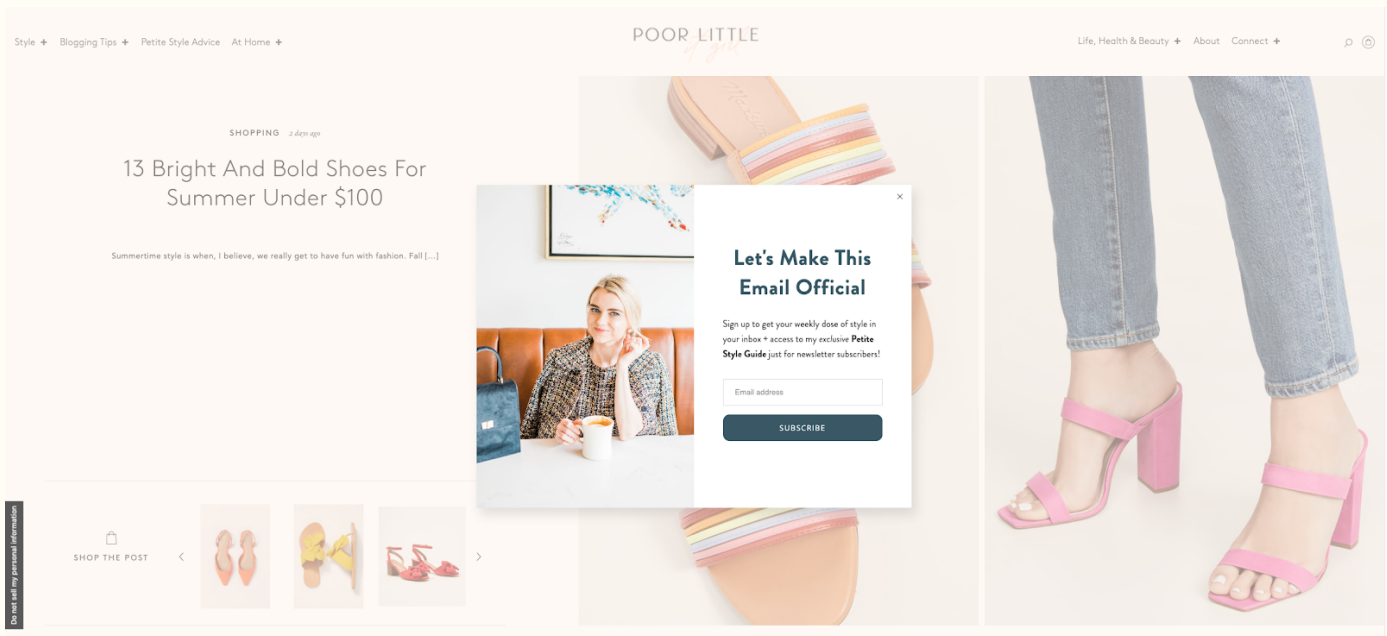
Password: insert here

How do I create an opt-in form?

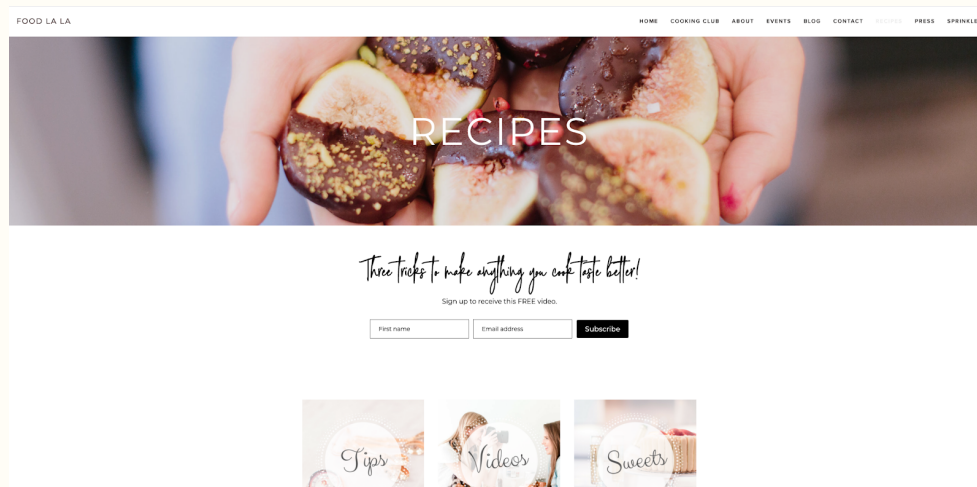
An opt-in form is the way you collect email subscribers from your website, blog, online store, Instagram—or wherever your ideal customers are hanging out.

Here are some examples of the different types of forms you can choose from depending on where you'd like your form to show up on your website.

The three form types are: Pop-up form: These are the kinds of forms you see when you visit a website. It appears over your website content, grabbing your visitor's attention so you can offer them a freebie download, a discount or newsletter resources in exchange for their email.



Inline form: This type of form embeds directly into your website and can be placed wherever you want it to show up. These are great to add all over your website and blog to encourage visitors to subscribe as they browse your website.



Full page form: The full page form is exclusive to Flodesk and is perfect for you if you...

- Don't have a website
- Don't want to worry about embedding form code into your website's HTML
- Want to create a quick landing page without spending a ton of time

The full page form publishes directly to the web without needing to paste in any code. Just copy and paste the link and share it wherever you want.

Now that you're all caught up on the different types of forms you can choose from, we'll walk you through how to create your first one.

****Please note:** Your form can only collect subscriber data and move this data into a segment you specify in Flodesk. In order to trigger a freebie email send or send a welcome sequence once your subscribers are moved into the segment connected to your form, you'll need to create a workflow. Read about creating a workflow above.

To Create a Form:

Step 1.

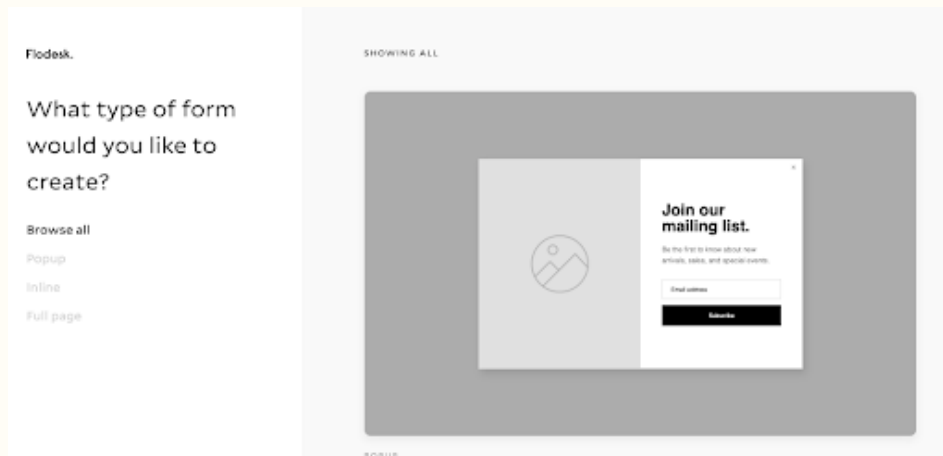
Go to Forms on the top menu in your Flodesk account

Step 2.

Click on + Create new to start a new form

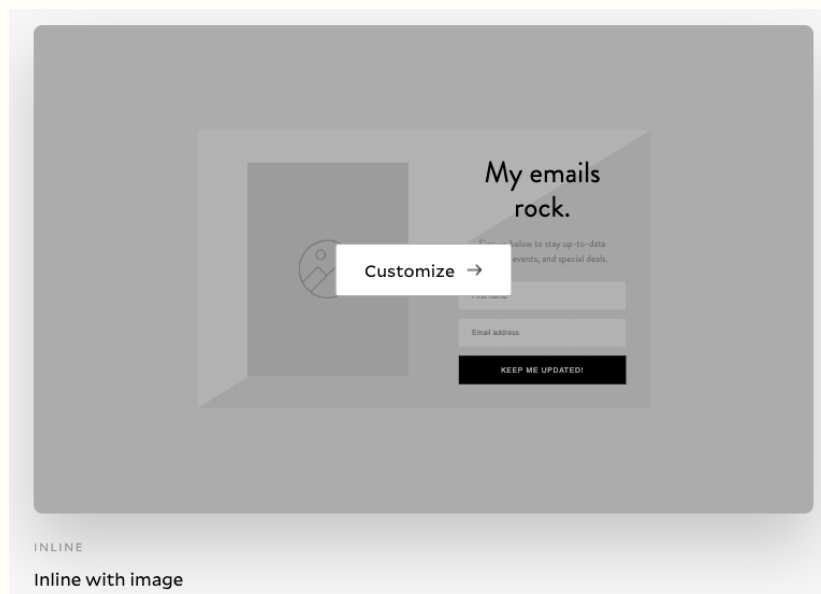
Step 3.

Select between a Pop Up (appears over your website content when visitors land on your website), a Inline form (appears inside a blog post, page, or article) or a Full Page form.



Step 4.

Click on Customize to start making it your own.





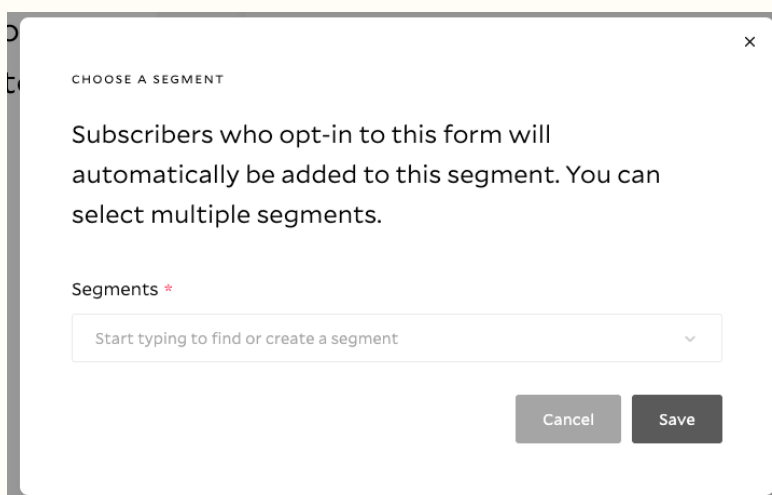
Step 5.

THIS IS SUPER IMPORTANT.

Select an existing segment(s) or create a new segment(s) for your form.

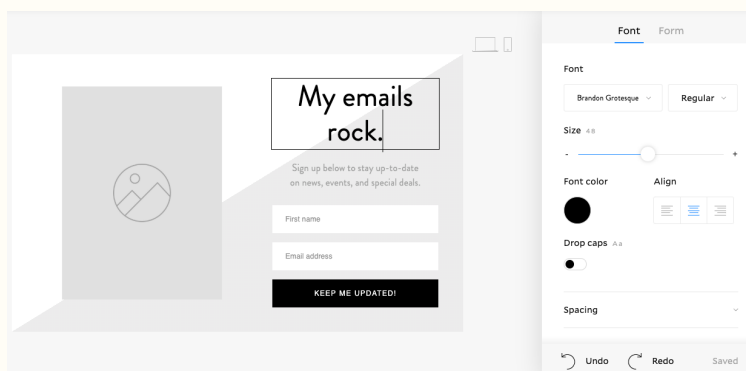
Why is this important?

Your new subscribers will be automatically added to this segment when they opt in. You will need this information to automate workflows in the future. (Learn more about how this works for sending automated emails [here](#).) You can later pull reports and insights on this segment's behavior to determine the success of your opt-in form. This is how you keep your subscribers organized —we strongly recommend one segment per form you create.



Step 6.

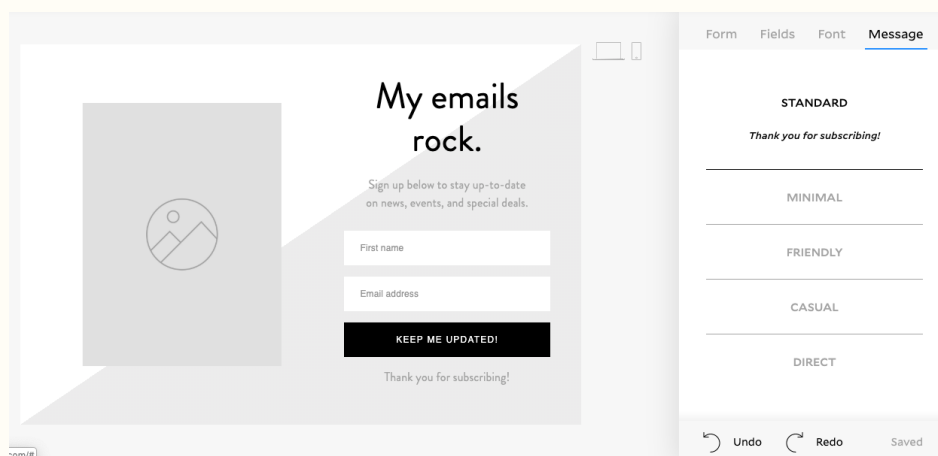
Click anywhere on your form to start editing.



Step 7.

Don't forget to customize your success message (this is the text displayed after someone subscribes to your form).

****Tip:** if you're not seeing the Message tab in your settings bar, click on the form background (outside the form) to go back to all form settings.



Step 8.

Click Next on the top right side of your screen to continue to form preferences. Here you'll be able to choose when this form is displayed, who gets it, and whether you get notified every time a subscriber opts in.

Step 9. Grab the HTML codes to embed on your website. After you paste these into the appropriate places on your website, your form will be ready to go! For a step-by-step guide on how to embed your HTML code snippets in the most common website builders, [click here.](#)

Flodesk How To's:

Username: insert here

Password: insert here

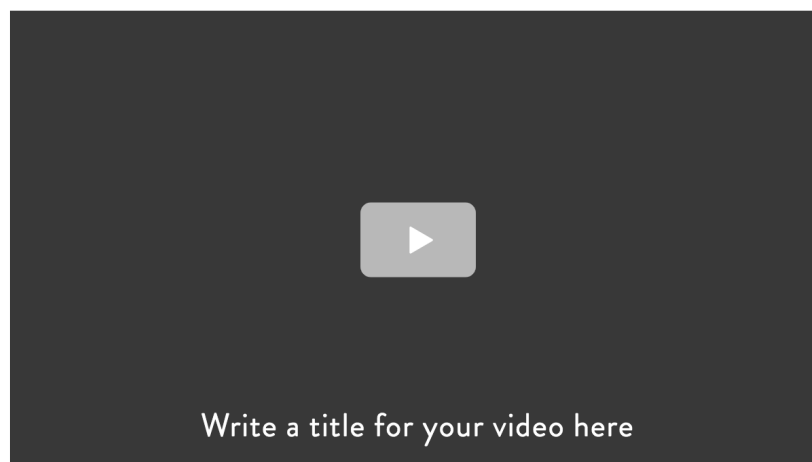
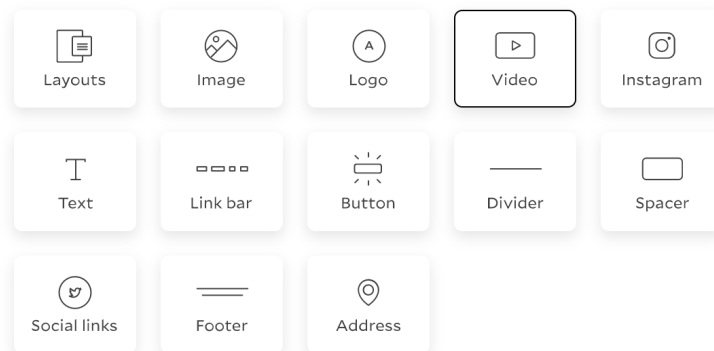
Adding video to you emails

Can video be added to a Flodesk email?

Yes and No...

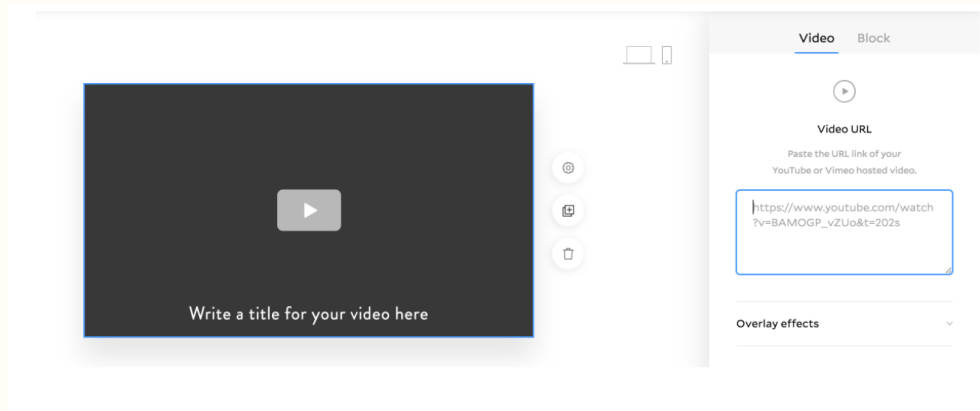
No: Video cannot actually be embedded into an email...The long and the short of it: you cannot currently embed a playable video with audio into an email, anywhere...

Yes: Flodesk has released a video block into the email builder that allows members to paste a YouTube or Vimeo video into the email.



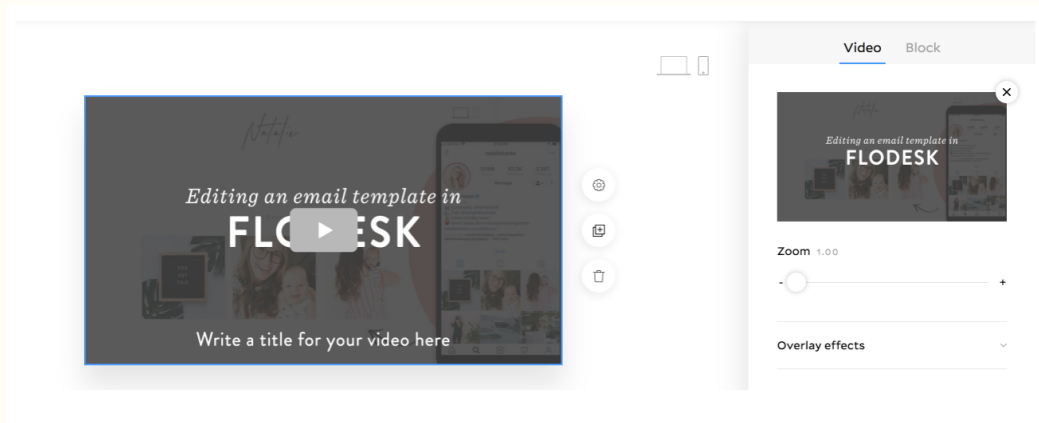
Step 1.

Add the video block into your email and paste your YouTube or Vimeo link into the Video URL box



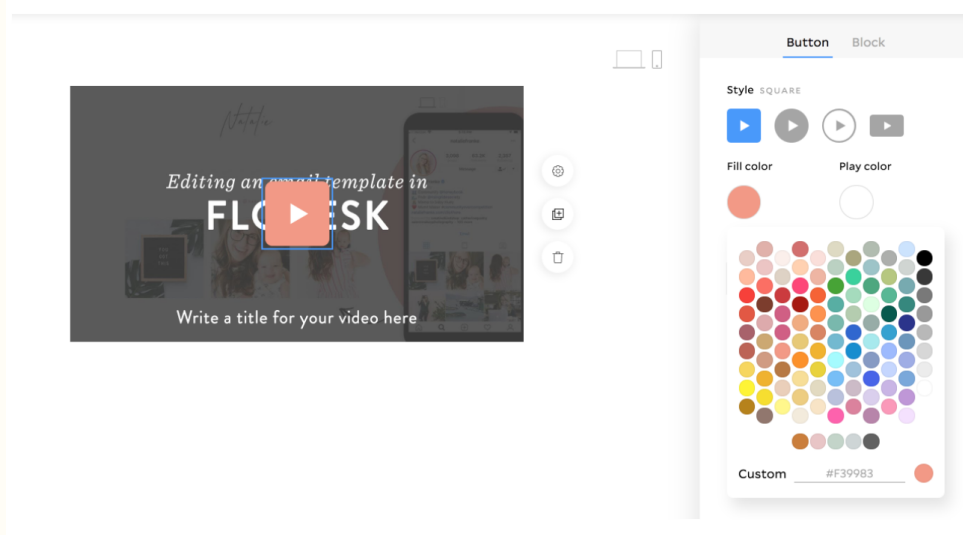
Step 2.

Flodesk will then automatically pull the video's preview image into the email for you!



Step 3.

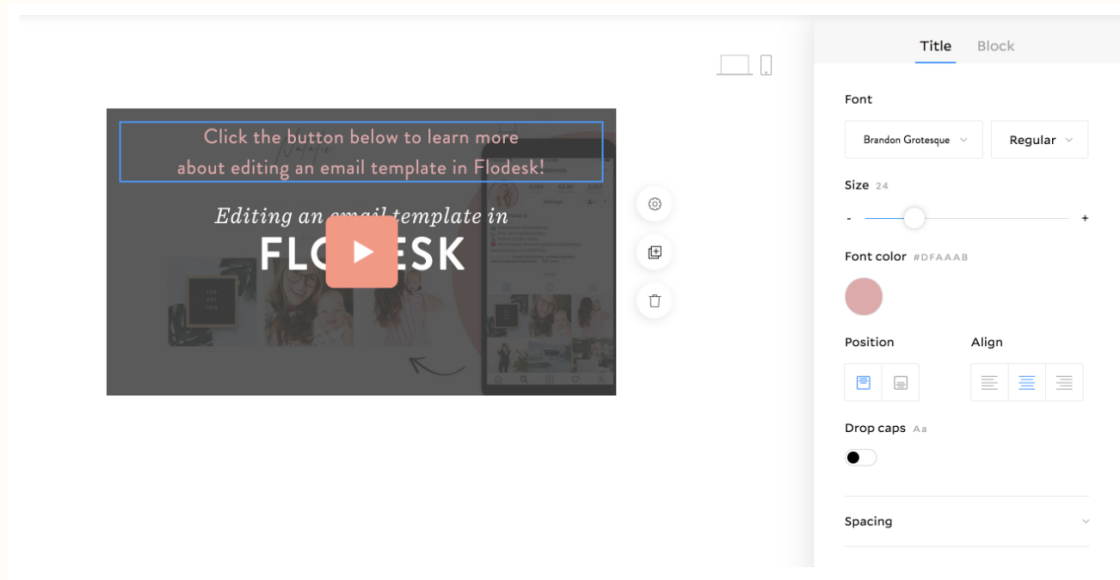
Then you can begin to edit the look of the video buttons! Exciting!



Step 4.

The preview image also has a title box that allows you to customize the video's title in great detail, including positioning, typography settings, colors, alignment, and custom fonts.

**Note: the video preview in the example below already has a title, but this Flodesk title feature comes in especially handy if your video preview is an image only with no text. You can use this title as a call to action to get your readers excited to hit the "play" button!



**Note: Once the email is sent, the video block will automatically link to the original YouTube or Vimeo video page. (Make sure you have a YouTube or Vimeo account so you can gain followers there)