Send an email with Advanced Automation
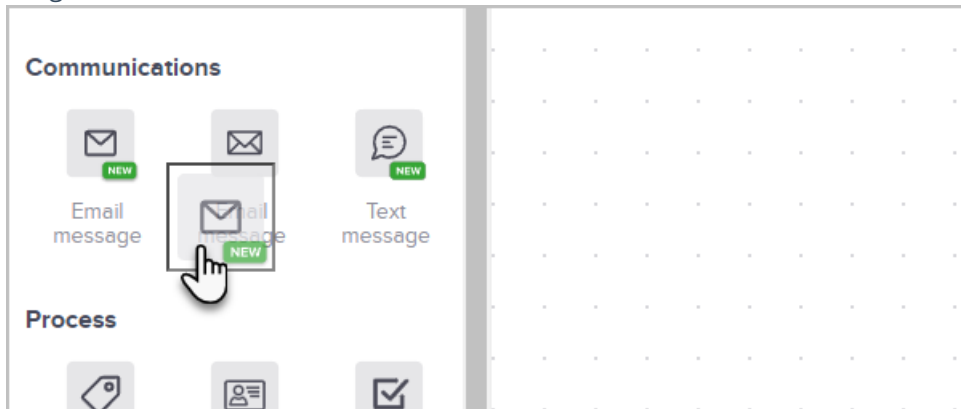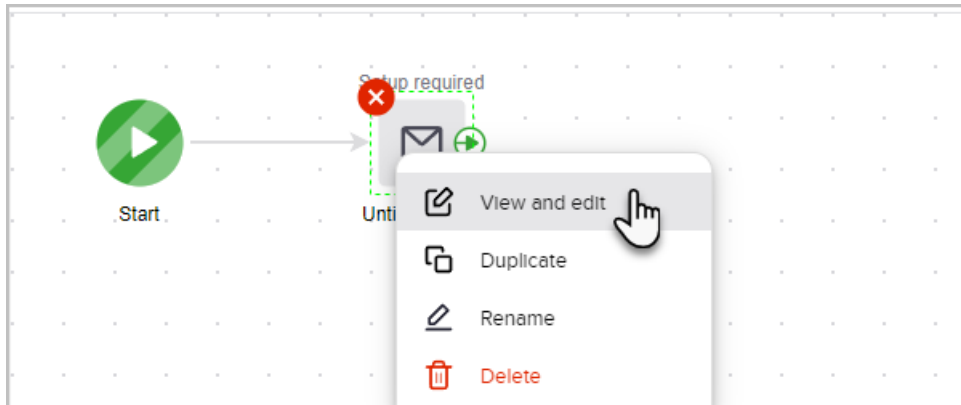
The new automation flow simplifies the way you create emails in automation. Now, you can find all the information in one place and navigate back and forth between the Template and Create steps without losing your content.

Getting started

1. Create a new Automation, or begin editing an existing one

2. Drag the new email builder to the canvas

3. Click on **View and edit**

Customize the Sender and Subject

1. From here, you can: modify the from address, enter your subject line and preview text, choose your audience, and start building your email.

2. To customize the Sender address, click **Edit**

3. Choose the sender from the drop-down,

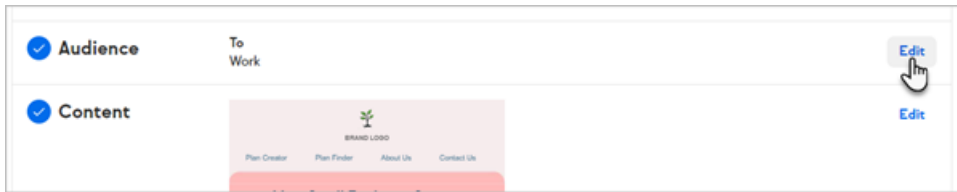4. or set up a **verified domain** to create a custom email address

5. Click **Save**

6. To add a subject line, click **Edit** next to the Subject.

7. Enter your Subject line and Preview text, and click **Save**. Personalize with emojis and merge fields. For more information, click here.

Define Your Audience

1. To choose your audience, click **Edit** next to Add audience

2. Add your audience by choosing which email type you would like to use. You can choose from the work, personal or other email addresses on the contact record. You can also add a new contact on the fly by choosing **Manually add an email**. Note that if you are in Max Classic, your options will be **Email, Email address 2, Email address 3, and other**
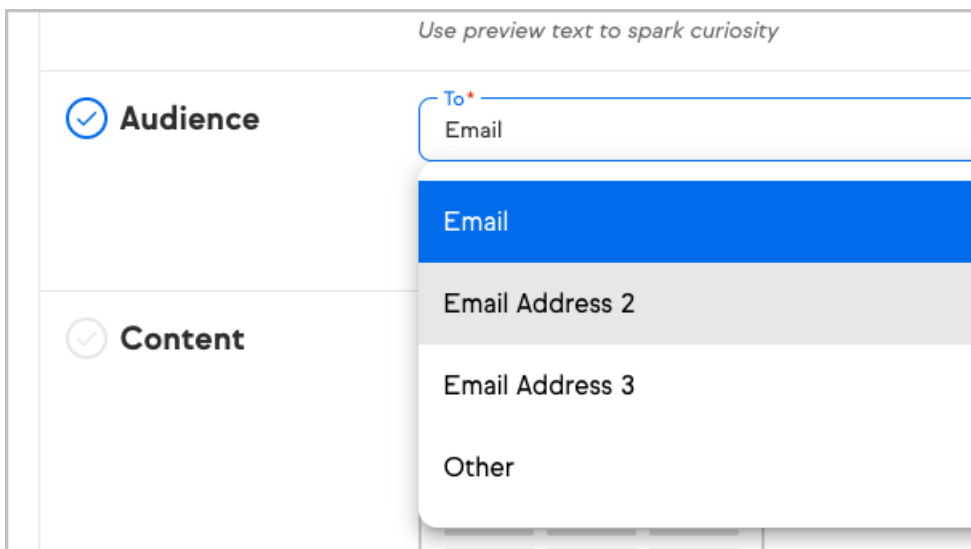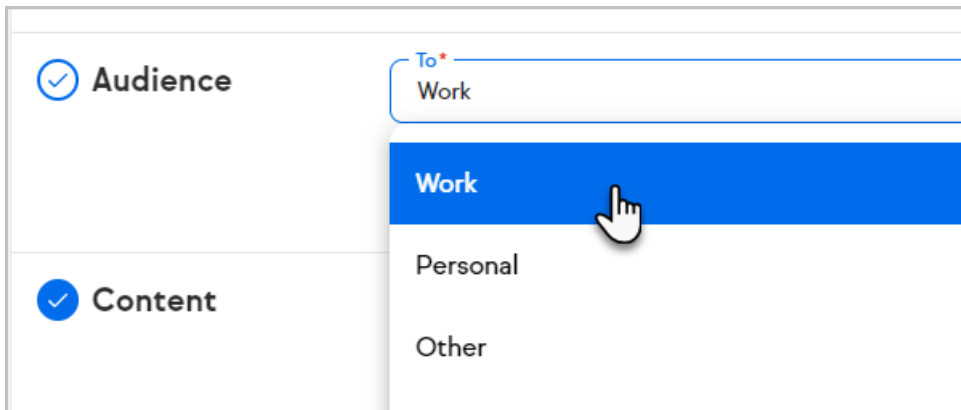
Create your email

1. Click **Edit** in the Content section to set up your email. Click here to learn how to customize your email
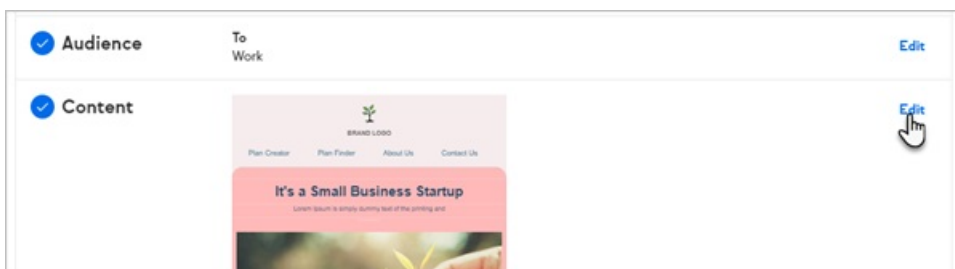
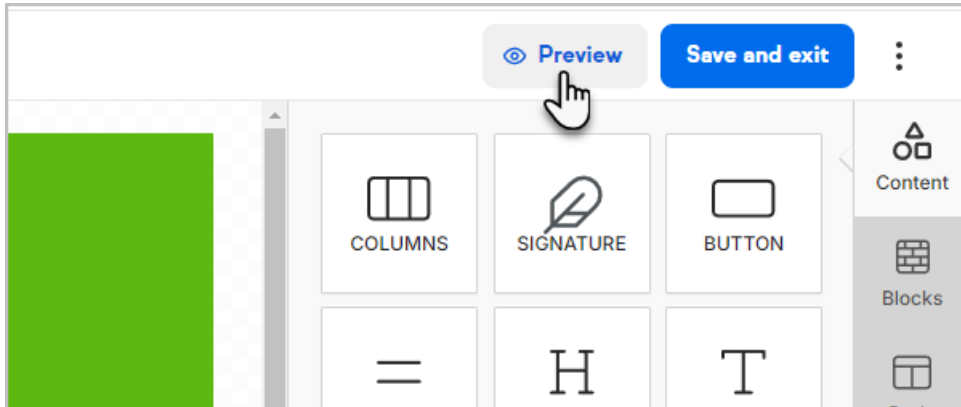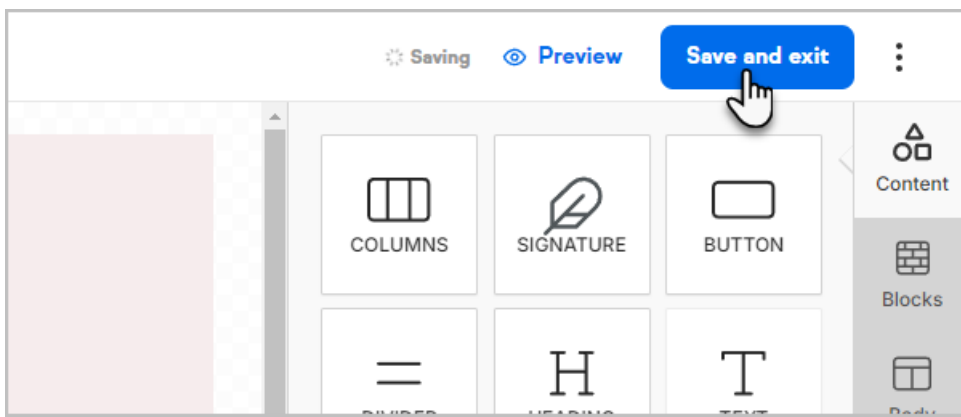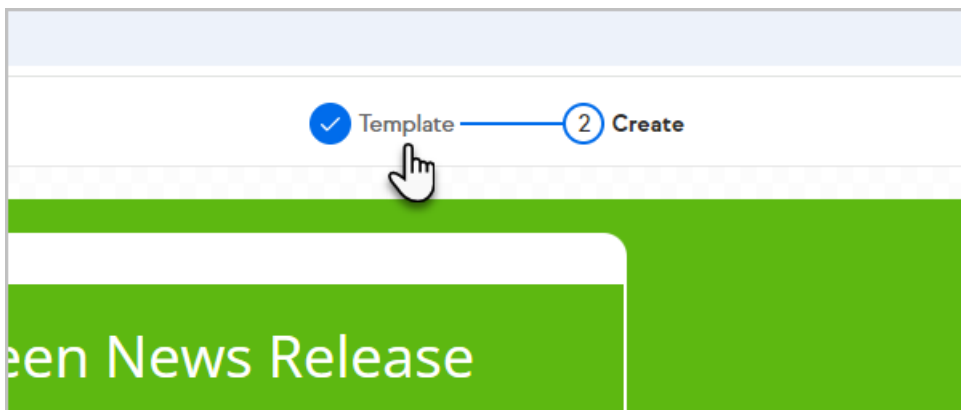2. Click the **Preview** button to see how the email will look in most email clients and mobile devices.
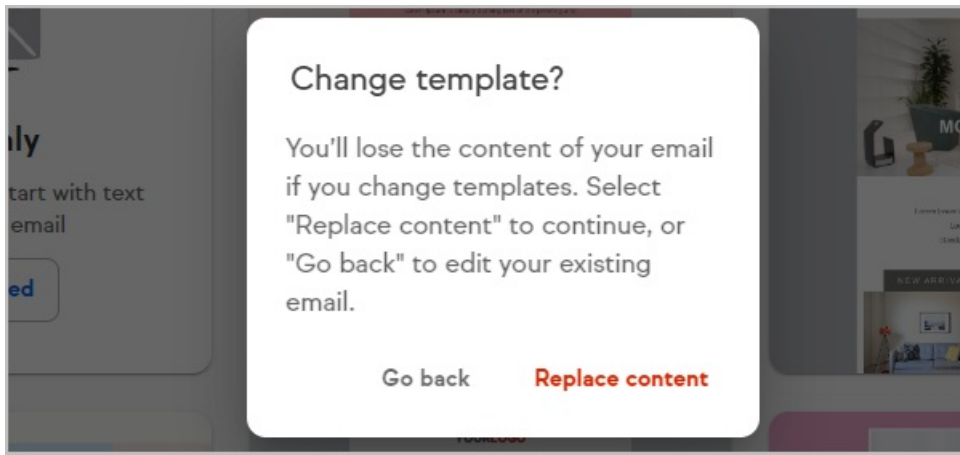

3. Click **Save and exit** when you are finished creating your email

4. Note that you can easily navigate back and forth between the **Template** and **Create** steps without losing your content. If you do decided to start over with a new template, you will be warned beforehand.

Using Affiliate Merge Fields

Note that you can merge affiliate record information into your emails (this is**ONLY available in Keap Ultimate** at this time.) You can merge this information in the body, subject line, and preview text. This will allow you to send personalized emails to your affiliates.

> ℹ️ Note that the affiliate password is not available to be merged. Once the new Affiliate program is released, the Affiliate Password merge field will no longer be necessary.
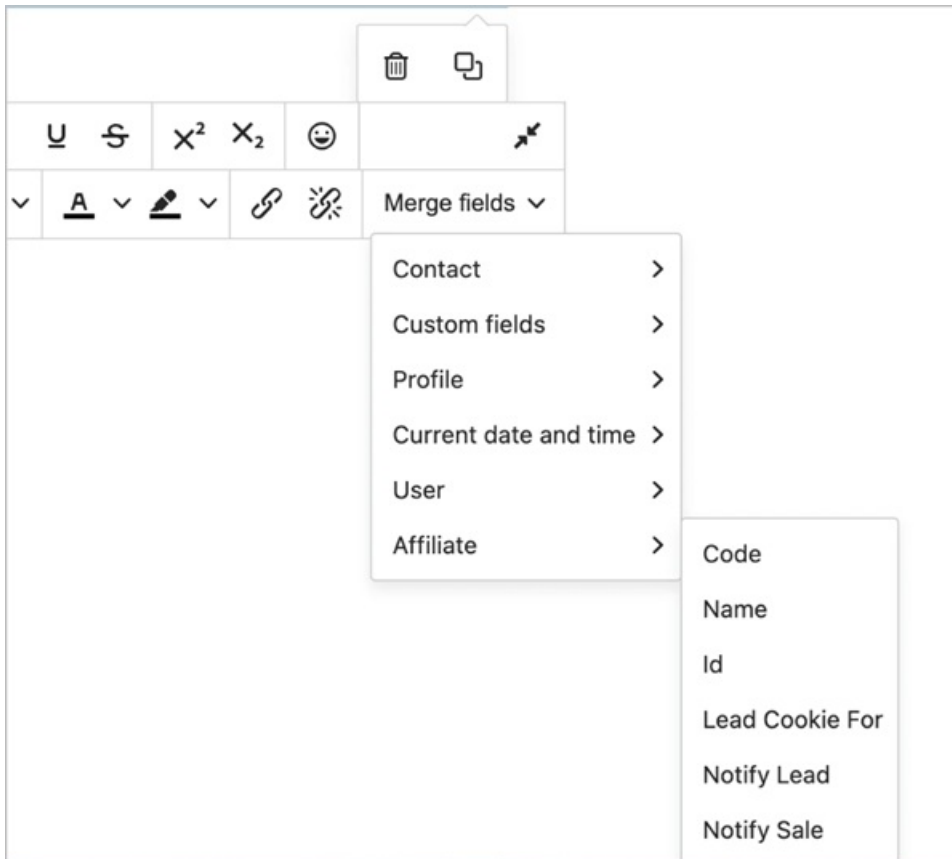
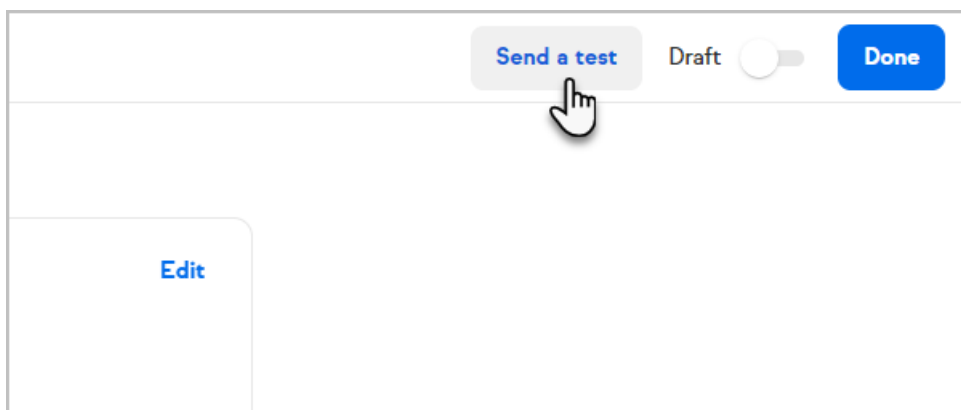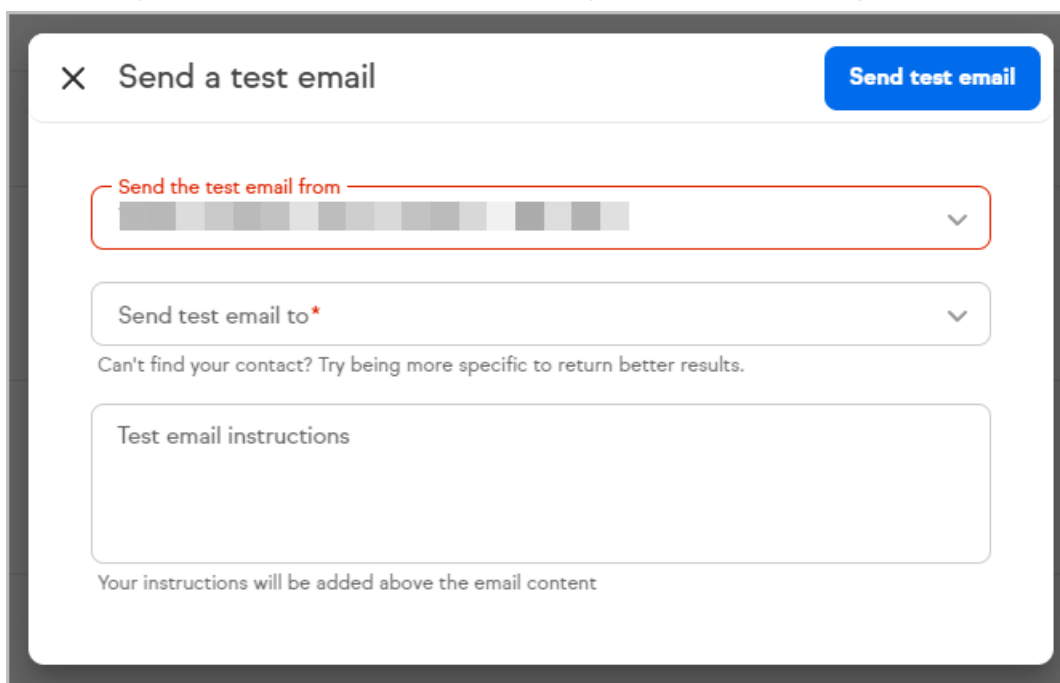# Test Email

1. After creating your email, click on **Send a test** located to the right of the page to send test emails

2. Choose who to send the email from, who to send it to and you can add some additional instructions for the recipient. You can send test emails to Keap users, contacts or any valid email address.

3. Send with Confidence! The Spam Content Risk Check will scan your email for spammy content, and the Audit tool will scan your email for errors and provide suggestions.
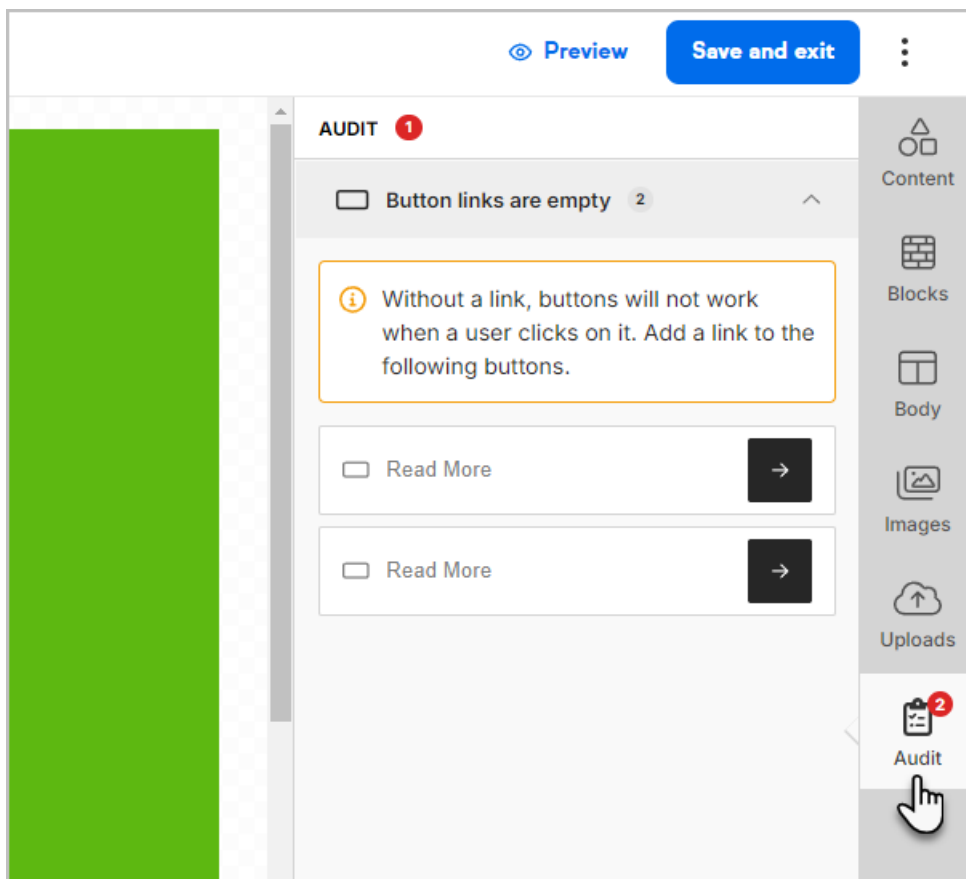
> **i** **Pro-Tip!** When sending a test email, merge fields that would pull contact information into your email will not function correctly and you may not see email signatures. To make sure your merge fields are working correctly in your email, we recommend you actually send the email to yourself prior to sending it to your list.
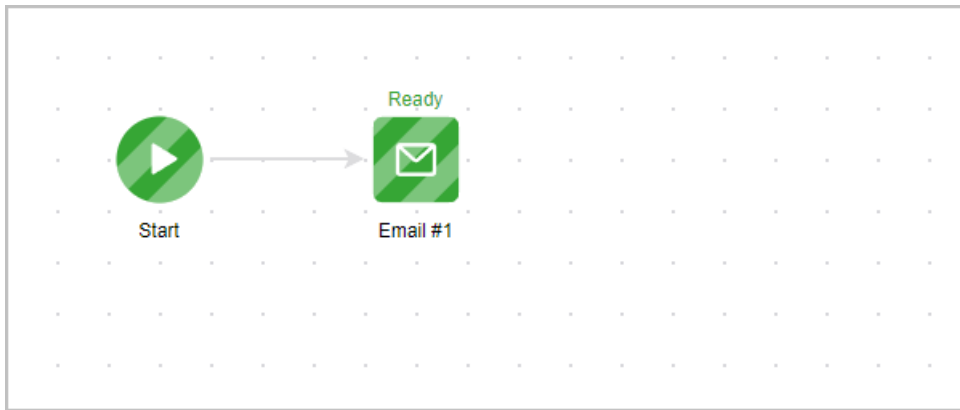
Set your Draft to Ready and click Done

1. Set your draft to **Ready** and click the **Done** button
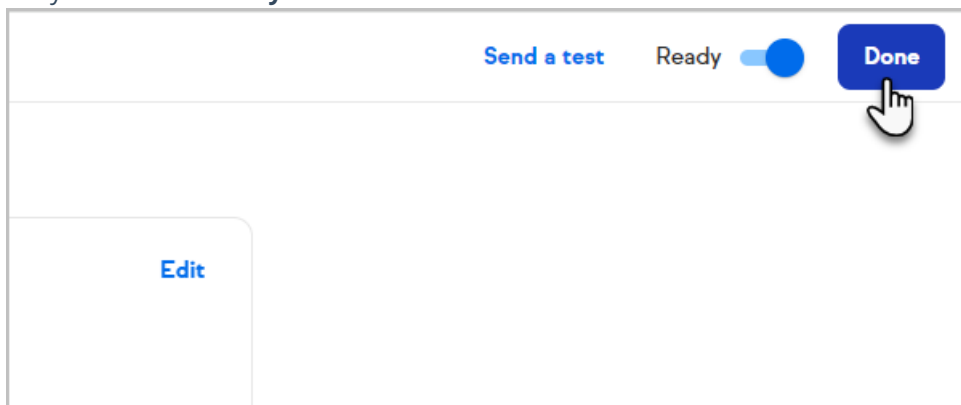
2. Now, your email will show as **Ready** on the canvas

FAQs

Can I send test emails to non-users?

Yes, you can send test emails to Keap users, contacts or any valid email address.

Can I send an email from a custom address?

Yes, you can add any address from a domain that you have validated.

Can I add emojis to the Subject line and Preview text?

Yes, you can add emojis to the subject line and preview text.

Why is the Password Merge field not available to Affiliates?

Once the new Affiliate program is released, the Affiliate Password merge field will no longer be necessary.