Mail Designer 365

Teams Admin Guide

Introduction

Welcome to the Mail Designer 365 Teams Admin Guide. This is a step-by-step guide designed to help team administrators get started with creating a Mail Designer 365 Team and work together with colleagues on email newsletter campaigns.

Follow the steps in this PDF guide to learn how to set up your team and adopt the Mail Designer 365 workflow. Alternatively, if you need help on just one area, use the contents page to jump through the guide to the relevant section.

Contents

Getting Started

What is my.maildesigner365?

my.maildesigner365.com is your online hub for all things **Mail Designer 365** and helps you easily carry out the following tasks:

- Purchase and assign Mail Designer 365 plans
- Manage your payment and billing preferences
- Build teams and invite members
- Collaborate with your team on email designs

To access my.maildesigner365, simply log in with your **equinux ID and password**.

Using the start page

Once you've logged in, you'll be greeted by your **personalised start page**. Here you will see an **overview of your teams.** As a new user, you are automatically created a team which you can start adding members to.

If you create more teams in the future, these will also appear on the start page.
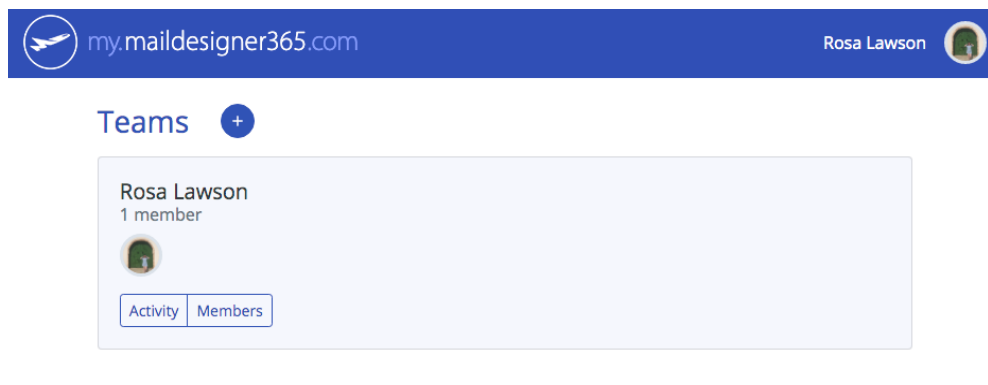

Selecting your team

Click on your team name to go to your team's homepage. This is where you can start to set up your team and manage your preferences in the future.

Setting up your Team

Having a Mail Designer 365 Team is really useful, as it allows you to **collaborate with your colleagues** on email campaigns, easily manage their plans and roles, and view your billing information and order history - all in one useful place.

Naming your team

To start off, it is a good idea to **change the name of your team** to make it easier for future team members to recognise. As an admin, you can change the name of your team in your team's homepage by clicking on your current team name and selecting **Edit** in the dropdown menu:
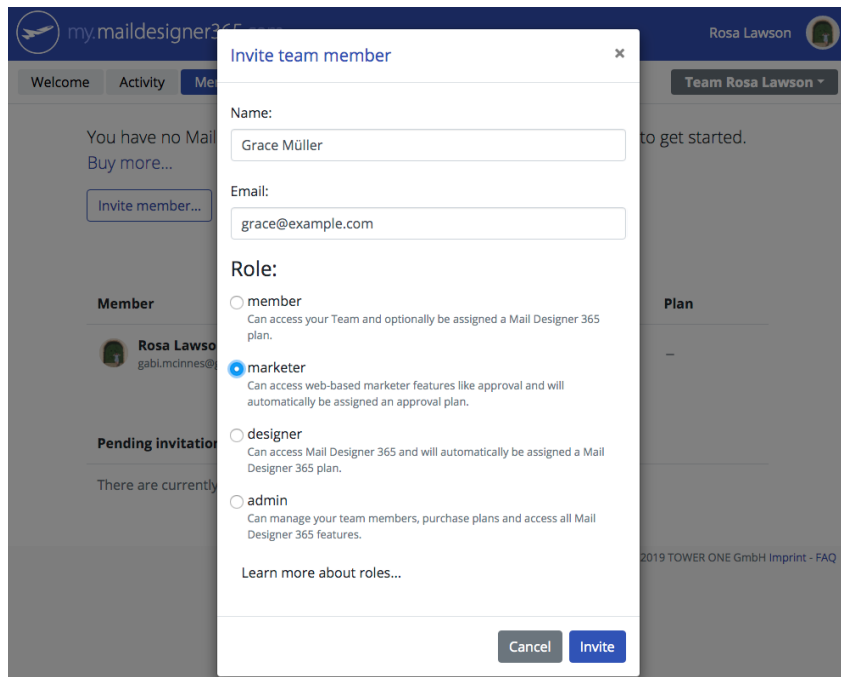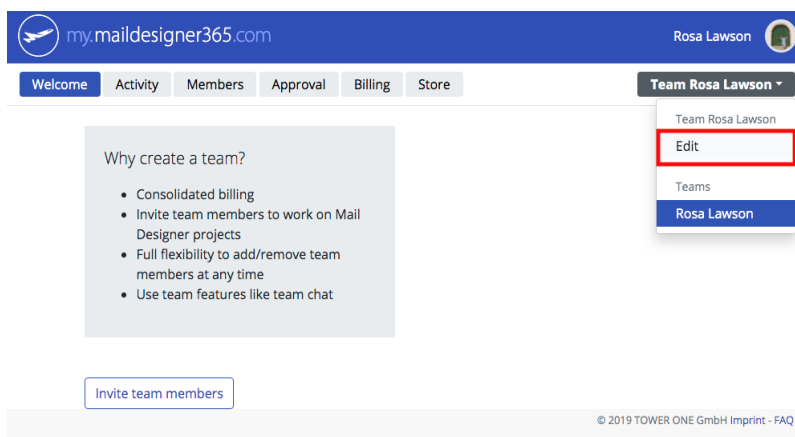

You can now **give your team a new name**, e.g. your company name or department name:
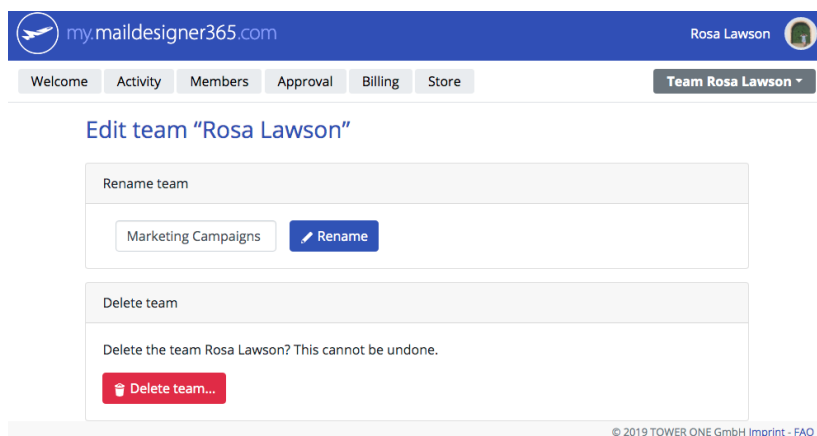
Inviting team members

Inviting a new member to your team is easy. All you need is their email address. Click on the **Invite team members** button and enter the name and email address of your team member:


Selecting roles

You can also select a designated role for each member:

- **Member:** Has access to your team but is not automatically assigned a plan. Use this role until you know which role this member will need.
- **Marketer:** Members of your team that will provide feedback on a newsletter design, but do not need full editing capabilities (e.g. campaign specialists, CEOs, managers...) Marketers are automatically assigned an Approval license, when available.
- **Designer:** Creative members of your team responsible for designing email campaigns and making changes in the Mail Designer 365 App. Designers are automatically assigned a Mail Designer 365 App license, when available.
- **Admin:** Your role as the member of your team who is responsible for purchasing plans, managing team members and overseeing the billing process. You can optionally assign yourself a plan.

Team invitations

Each team member you invite will receive a personalised **email invitation** to join your team:
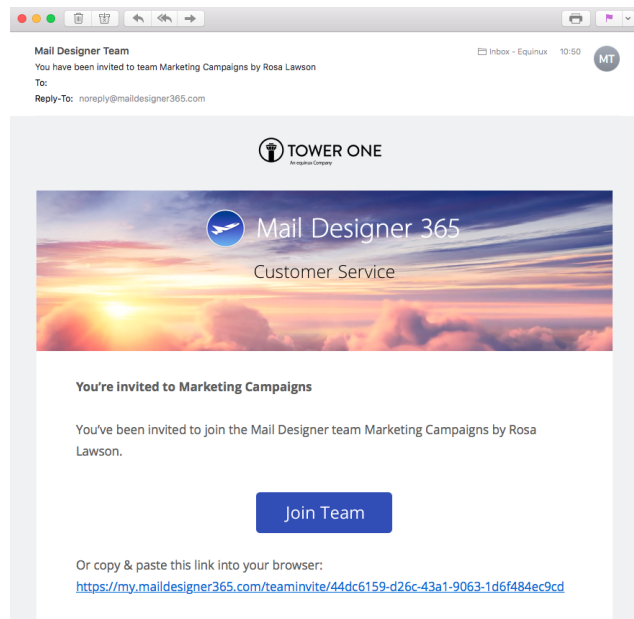
Important: New members will be prompted to **register and create an equinux ID** as soon as they accept your invitation.

Managing your team

Click on the **Members** tab to receive an overview of all your team members, including their respective roles and licenses. If any members of your team have been assigned roles which require a **Mail Designer 365 plan**, this will also be indicated here and you will be prompted to buy more plans:
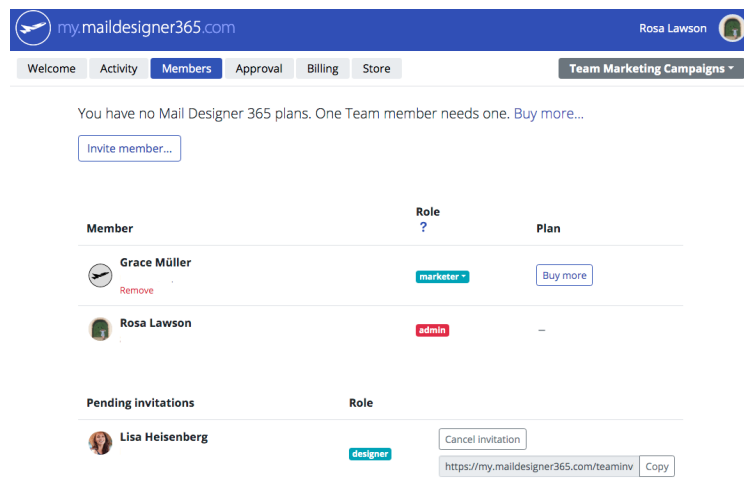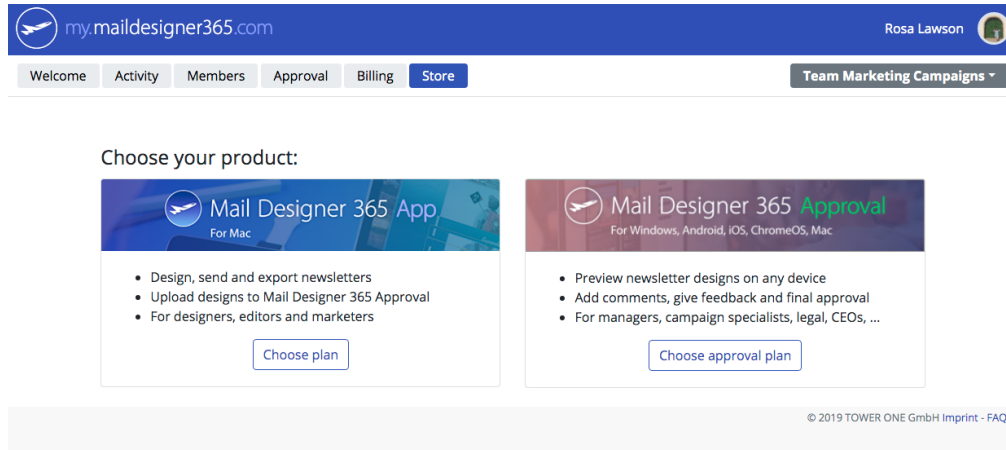
Purchasing Mail Designer 365 Plans

Now that you've got your team set up, you'll need to start **adding plans to your account**.

Accessing the store

To access the Mail Designer 365 store, head to the **Store** tab on your team's homepage. Here you are given the option to choose between the Mail Designer 365 App or Mail Designer 365 Approval:

Which plans do I need?

Which plans you need depend on how many members you have in your team and which roles they hold. A Designer will require the Mail Designer 365 App; however, a marketer may only need an Approval license. This useful graphic shows an example workflow:
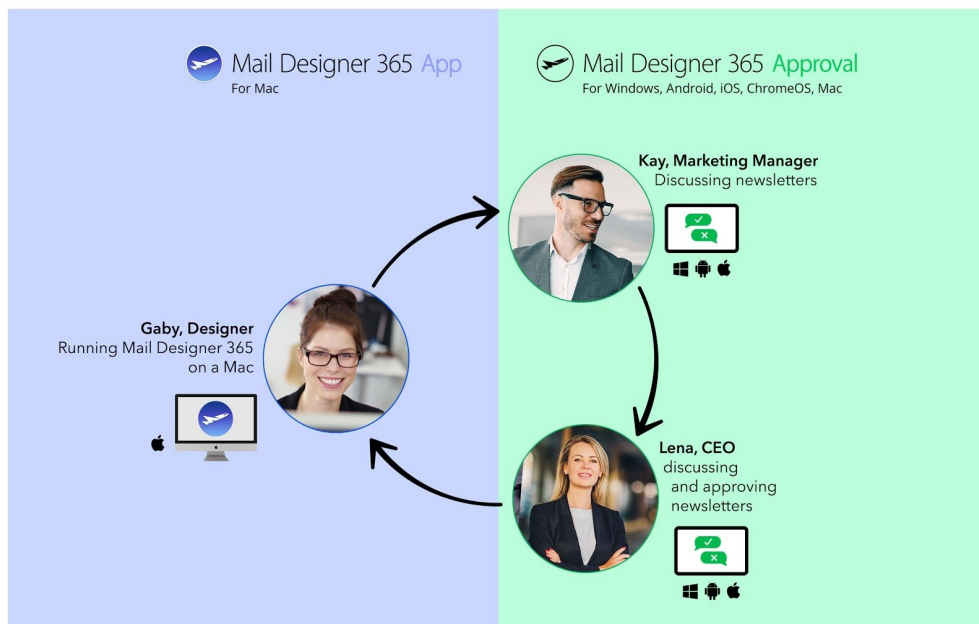
Buying a plan

Once you've determined which plans you need, click on **Choose plan** and enter the number of licenses you want to add.

Here you can also choose whether you want to be billed annually or monthly and your quote will be automatically generated for you. During this stage, you can also add your chosen payment method.

Once your purchase has been completed, your licenses will be added to your team's account and automatically assigned to the relevant team members.
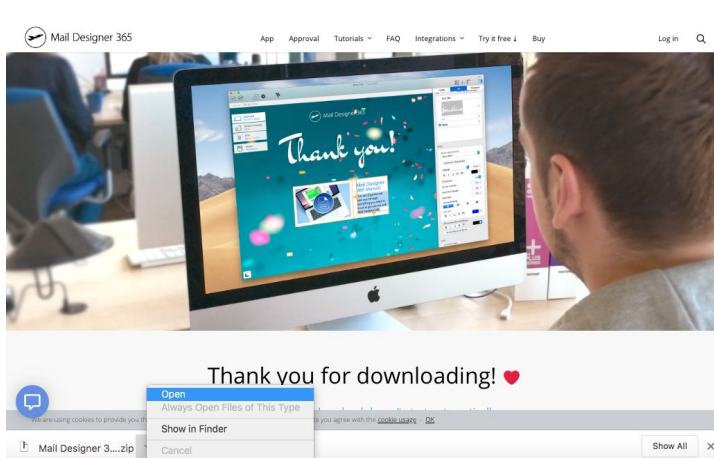
Mail Designer 365 App

Your team is now all set up with the correct plans, so it's time to get to work! Designers can use the tools and creative resources provided in the **Mail Designer 365 App** to build an email template to use for your team's email campaign.

Downloading the app

To get started with your design, download the Mail Designer 365 app here:
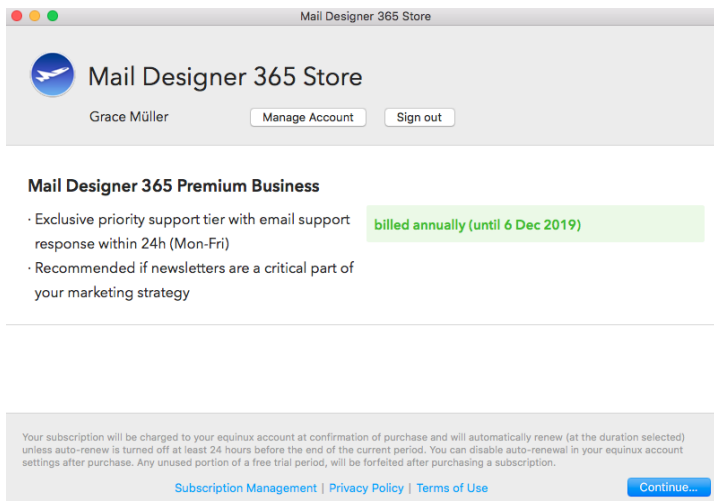https://maildesigner365.com/goto/HPdownload/maildesigner365
Once your download is completed, open the .zip file to install the app onto your Mac:

Signing in

Open the app and sign in with your equinux ID and password.

Using the app

There's so much to Mail Designer 365, but in this guide, we are just going to take you through the basics you need to get up and running. For more detailed step-by-step tutorials, check out the resources linked at the end of this guide.

Choosing a Design Idea

The Design Chooser is where you'll find Design Ideas to build your email campaign with. You can choose from a range of ready-made templates, or select a blank template to start from scratch. Double click on a Design Idea to edit it:
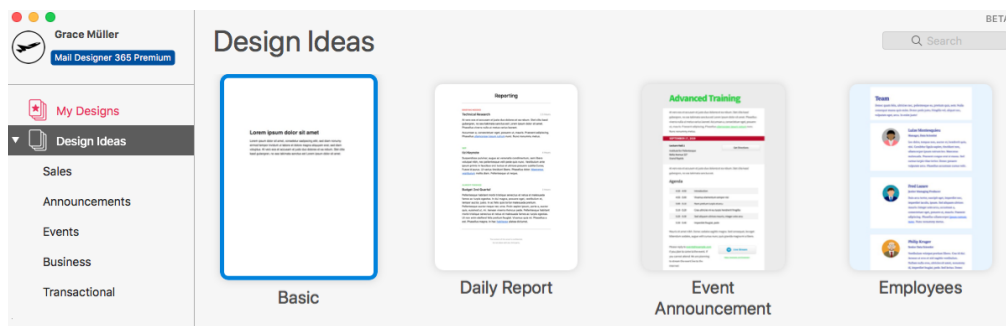
Building a template

Use the creative tools and layout options in Mail Designer 365 to build your email newsletter. You can find all the tools and style options you need in the menu on the right-hand side. For help with designing emails, check out the [Mail Designer 365 Manual](#).
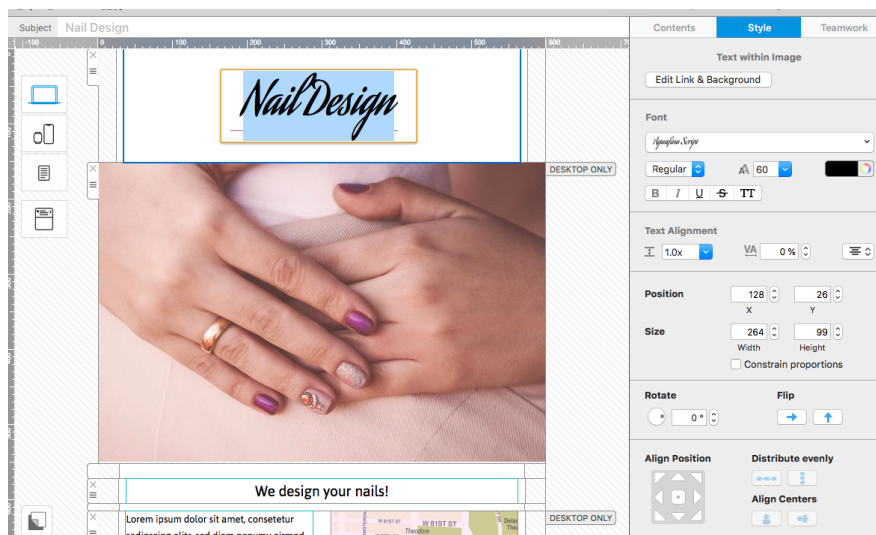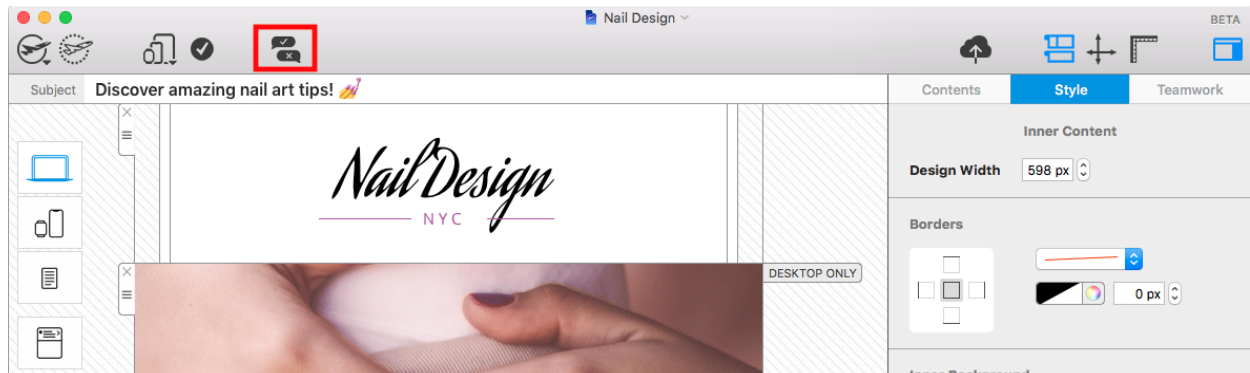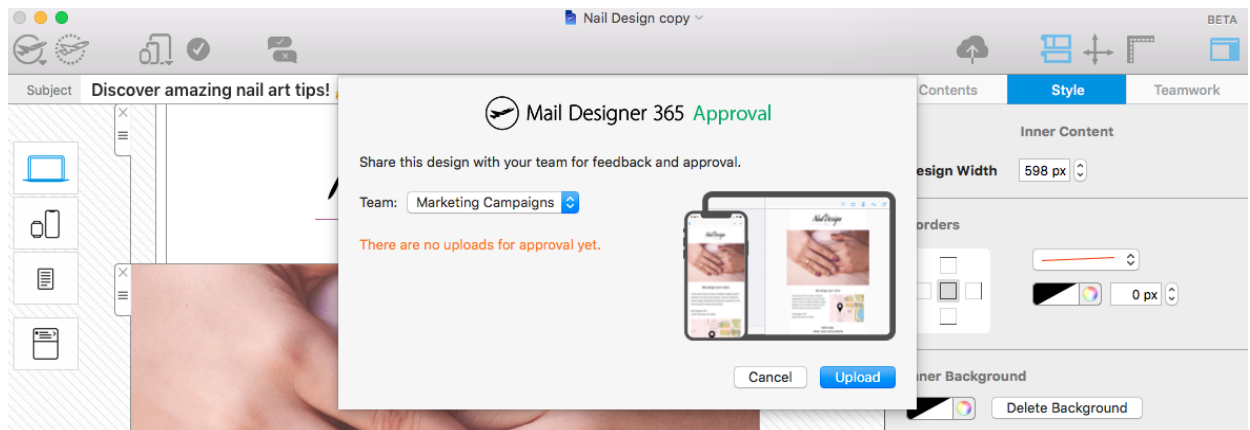
Mail Designer 365 Approval

Now that you've built the first draft of your email design, you're going to want to share it with the rest of your team and get their feedback. This is where **Mail Designer 365 Approval** comes in.

Uploading an email design to Approval

Once the first draft of your design is ready, **click on the Approval button** in the app menu to upload your design:


You will then be prompted to **select a team** from the dropdown menu. Click **Upload** to **send your design to Approval**, where your team members will be able to provide feedback:

Inviting your team to leave feedback

Once you've uploaded your email design, you can click **Go to Approval** to view it on the Approval platform. Click on the invite icon in the top right-hand corner to **invite team members to give their feedback** and join in with the design discussion:
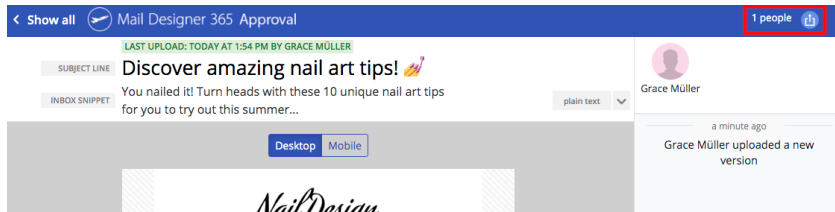
A list of your team members will now appear. Check the box next to the names of the team members you want to **share the email design** with and click **Share**:
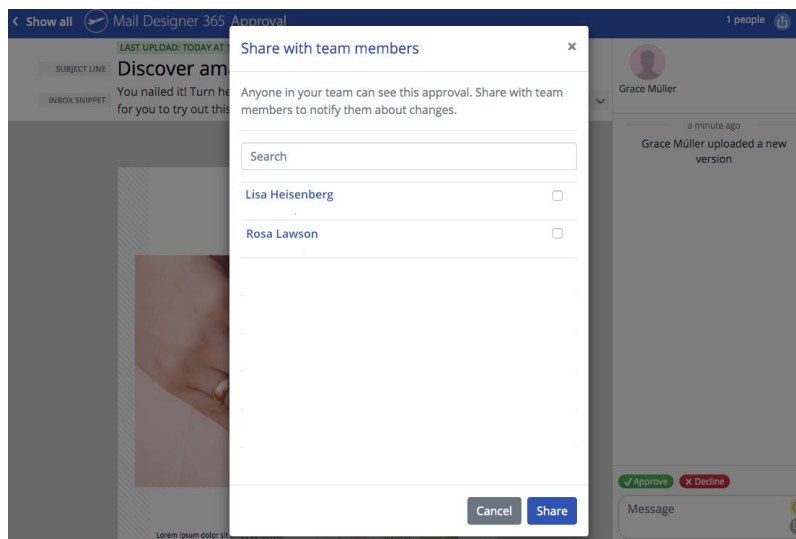
Team members who are invited to give feedback will receive an **instant email notification**. They can then access the design using **any platform** (Mac, Windows, iOS, Android, Chromebook, etc.) to leave their comments. Simply **click on the link** in the email to view the design:
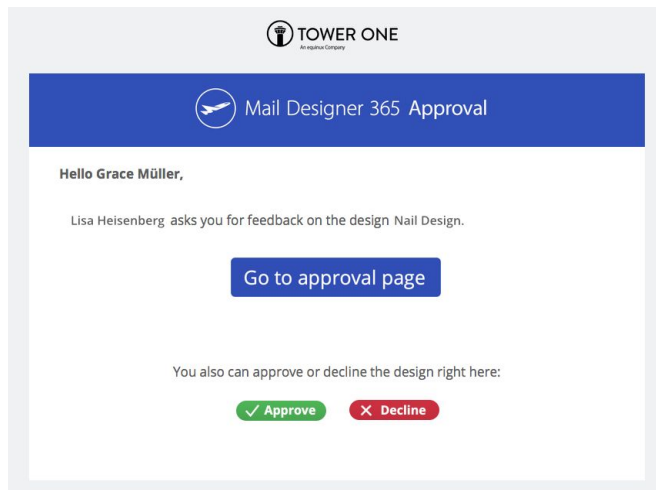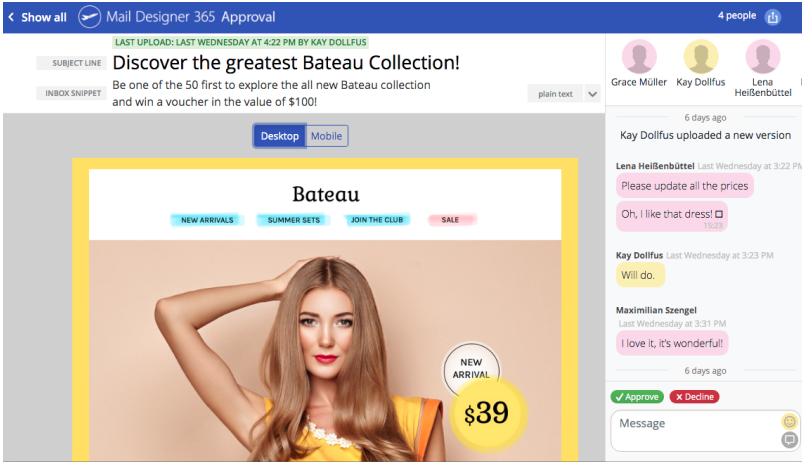

Leaving feedback on email designs

You can access all of the email designs your team has uploaded to Approval via the Approval tab in my.maildesigner365. Go to your team's welcome page and click on **Approval**.

Here you will be able to see how many email designs are waiting for feedback or approval, outstanding comments, as well as the upload date and the team member who uploaded them:
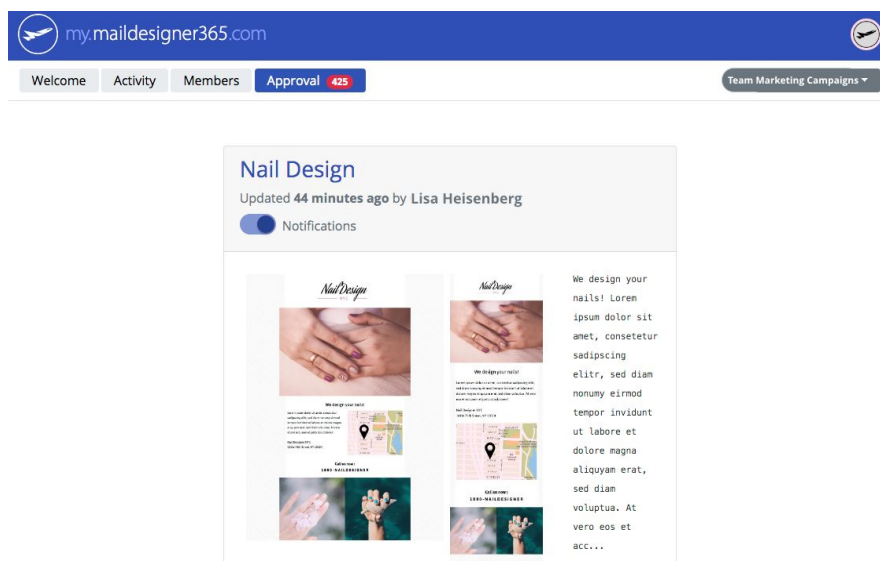
Click on a design to open it up. This will also open the **Approval chat window**. Join in the discussion on your team member's design, or be the first to leave a comment or suggestion:
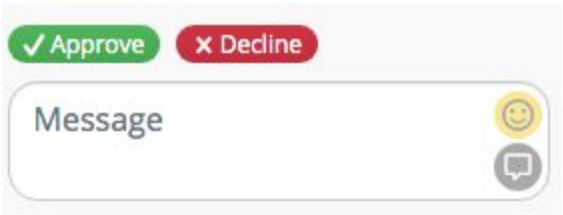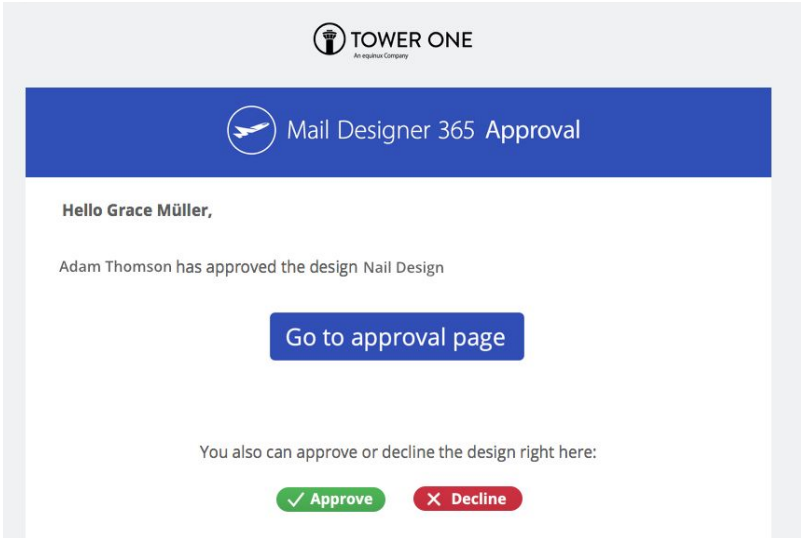

Approving a design

Mail Designer 365 App users can take your feedback on board and upload multiple revisions of a design to the Approvals portal using the button in the app. Uploading a new revision of a design will send an email alert to anyone who has been invited to work on it.
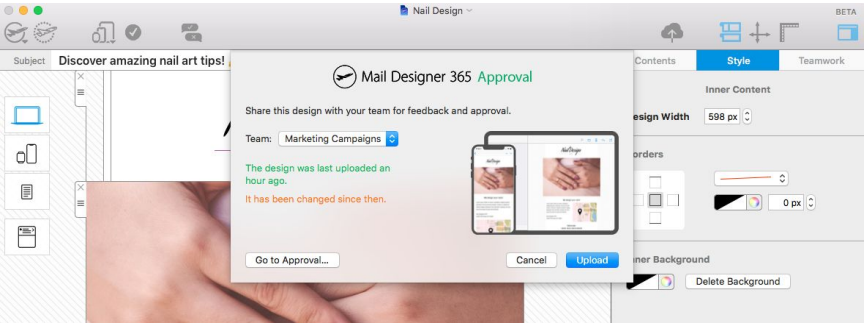
When you are satisfied with the end result, you can click the green tick icon to **approve a design:**

Once an email design is approved, the email designer will receive an instant email notification to let them know you are happy for them to send.

Exporting a design after Approval

After your team has approved your design, you can use the Mail Designer 365 App to **export your newsletter** via your chosen ESP or via HTML and share with your email subscribers. Do so by clicking on the **Share** menu and choosing your preferred export method:
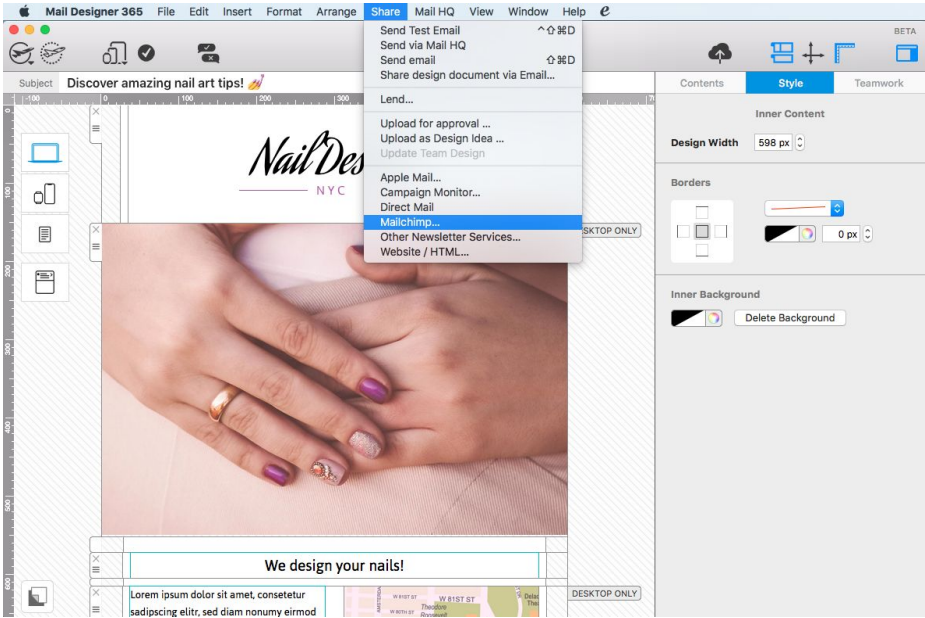
Other resources

We hope you have found this guide useful and will have no problems in setting up your team and getting started with the Mail Designer 365 workflow.

Here are some more useful resources which will help you get started with Mail Designer 365:
- Mail Designer 365 Manual
- Video Tutorials

Contact us
If you are still having difficulties setting up your team, or have a specific question for one of our support staff, send us an email and we'll get back to you asap.

Stay creative!
Your Mail Designer 365 Team