



USING SQUEEGEE SEND



Ensure **Block editor for SEND** is switched on in **Settings > New & Beta Features > Block Editor**

CREATE YOUR AUDIENCE

Select the group of people you would like to send your campaign to.

CREATE AUDIENCE

Click the **Create Audience** button in the **AUDIENCES** tab.

1. Give your audience a name and description—for example, 'Window Cleaning Customers'. This helps you easily recognise and reuse the list later. (any new customers that fit this filter will automatically be added)

2. Use **filters** to build your audience. You can filter by things like:

- The service they receive (e.g. gutter cleaning, pressure washing)
- The area they are in
- Whether a customer or prospect

3. Add multiple filters to narrow down your list even more—for instance, 'Gutter cleans in TN22'.

4. Click **Save** once your audience is ready. The number next to the icon shows how many are in that list.

5. Your saved audience will now appear in your **Audience** list, ready to be used again for future messages or campaigns.



CREATE YOUR TEMPLATE

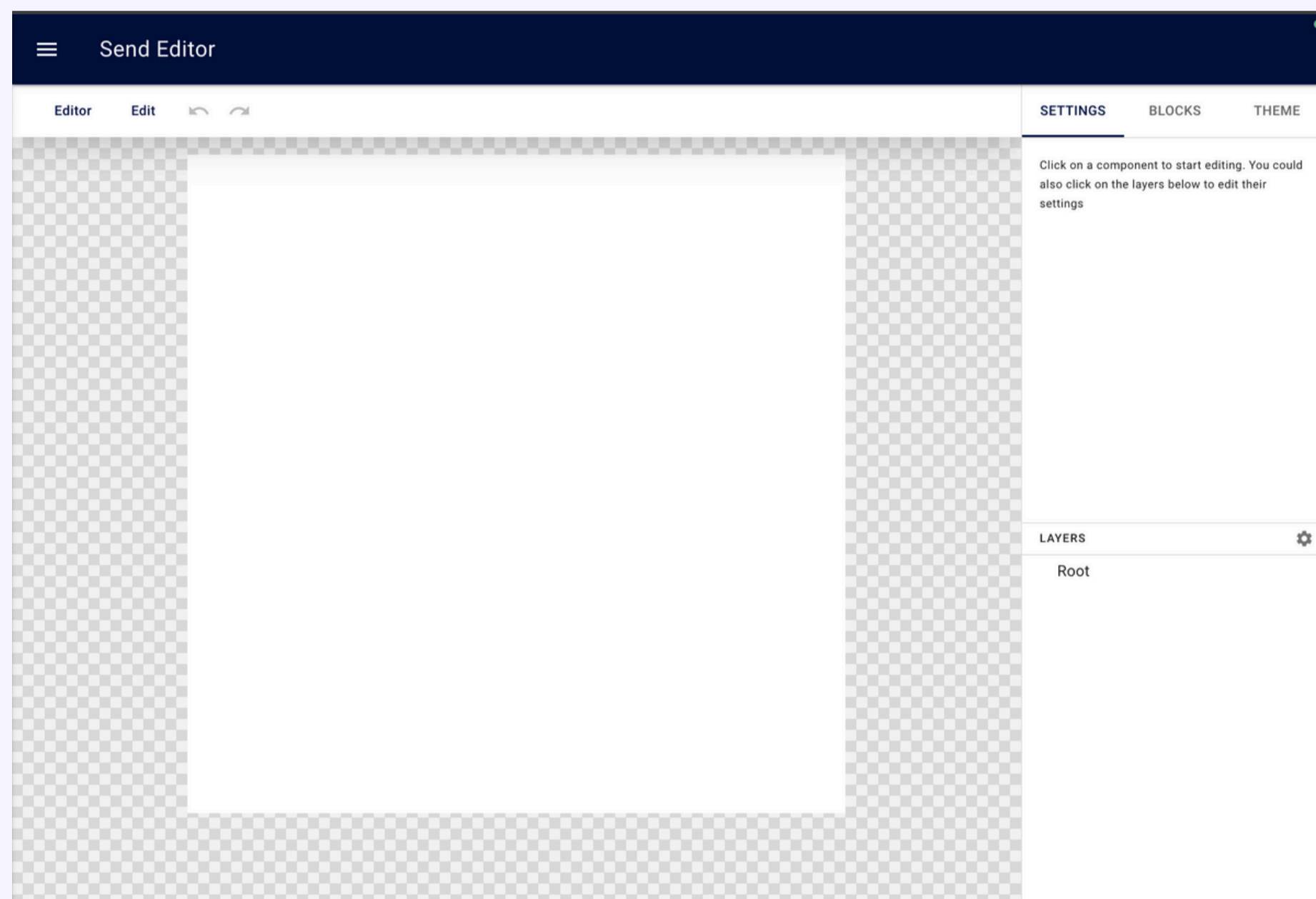
1. In the **TEMPLATE** tab, click the **Create Template** button to get started.

2. Give your **template** a name and add a **subject** for your message.

This can be set to apply to both SMS and email.

If you want the full template to show via a link in the SMS - tick the box

Click **Next > Select > Finish**



3. Go to the **BLOCKS** tab to start designing your email.

- Drag and drop a container into your email layout to keep everything aligned.
- Add the elements you want—just drag and drop things like:
 - Image block
 - Text block
 - Button block

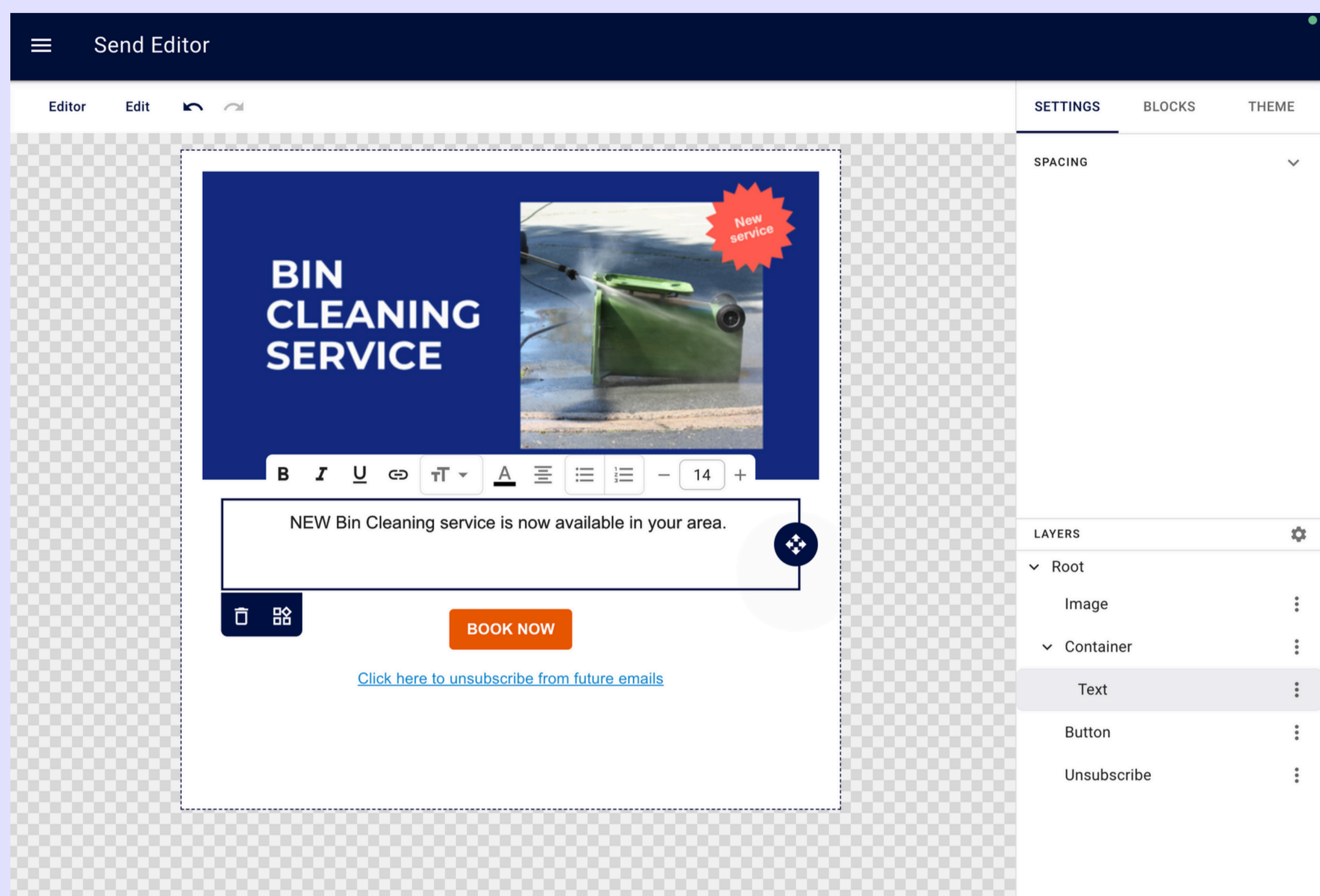
4. To add an image:

- Click on the image block
- Go to the **Settings** tab
- Click **Choose Image** and upload your file
- You can also add a link to the image if you want it to be clickable.

5. Customise the look:

- Adjust sizing, spacing and appearance.
- Use the **Theme** section to:
 - Apply your brand colours
 - Choose your font
 - Keep your email style consistent and professional

6. Use the **Editor** button to save and preview the template.



TIP: Set up a test audience using your own details before sending out your email. This lets you:

- Check that all the text reads well.
- Make sure all the links work.
- See exactly how the email/SMS will look to your customers.

SENDING YOUR EMAIL/SMS

Once you are happy with your template - **Save** and **Quit**.

- 1.Go to the **CAMPAIGNS** tab - click **Create Campaign**
- 2.Fill in **Campaign Name** and **Campaign Description**

CAMPAIGNS

TEMPLATES

AUDIENCES

Campaigns / Create Campaign

Untitled Campaign

DISCARD

SAVE

✓

Details
Details about this Campaign

Campaign Name *

Campaign Description

✓

To
Who is the campaign for?

Choose a Audience

✓

Delivery Methods
Which delivery methods should be used to distribute this campaign?

☐ Email

☐ SMS

- 3. Select your **Audience**
- 4. Select your **Delivery Method** - either SMS or email or both
- 5. Choose your template and **Save**

← Campaigns / test

test

Draft

PUBLISH

Summer offer

CREATED DATE

DELIVERY METHOD

CONTACTS

7 July 2025 12:39

EMAIL

0

Templates

Summer Offer

Gutter Cleans only £80

Audiences

Window Cleaning Customers

window cleaning active

SELECT DATE & TIME

July 2025

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CANCEL

NEXT

- 6. Your email will now appear ready to **Publish** - this can be scheduled in advance using the **Schedule** button and selecting your preferred day & time.

Ongoing Campaigns

Used to send out set emails, eg. a welcome pack to every new customer that signs up.

1. Use filters to build your audience. An easy way to do this is tagging by customers (e.g. #newcustomer) in the **Customer Profile > Description** field.
 - Click **Create Campaign**
 - Select your audience and email template
 - Tick the **Ongoing** Campaign box
 - Click **Send** to send your campaign as usual.
2. When you revisit the campaign later, you'll see any newly added customers in that audience—ready to receive the same email.
3. Exclude customers if needed
To stop specific people from receiving the email, simply tick the **Exclude** box.

SEND REPORTING

Measure the success of your campaign once it has been sent.

1. In the **CAMPAIGNS** tab click on the campaign name
You will see details of the email and SMS messages sent including the open and click through rates.

