



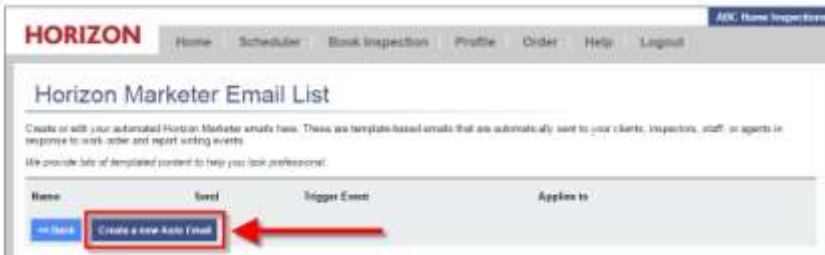
HORIZON MARKETER STARTUP GUIDE

How is it accessed?

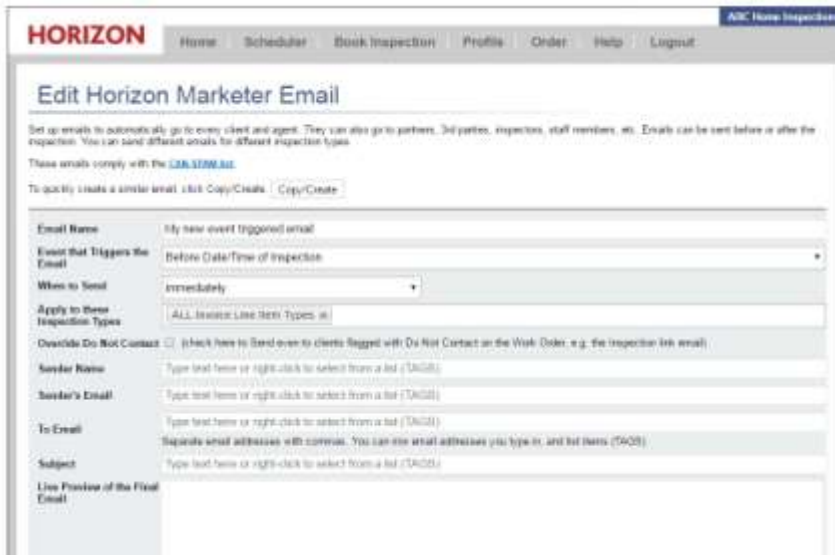
- 1) In the Horizon Profile, under **2. Administration > Horizon Marketer Setup > Settings**.



- 2) This is what the main dashboard looks like:



- 3) You will be taken to the 'Edit Horizon Marketer Email' screen. On the page below we will look at the various input fields.



- a) **Email Name** – This is the name of the Email for internal reference only.
- b) **Event that Triggers the Email** – This is the action that will trigger the Email to send, in combination with the When to Send criteria. Here is the list of the events that can trigger a marketing email.

Event that Triggers the Email	After Online Contract Accepted
When to Send	Before Date/Time of Inspection
Apply to these Inspection Types	After Date/Time of Inspection
Override Do Not Contact	After Report Generation (version 1 of the final report)
Sender Name	After Booking (work order creation)
	After Successful Online Payment
	After Online Contract Accepted
	After Inspection Booked Online
	After work order Write Report button clicked
	After work order cancelled

- c) **When to send** – Ranges from immediately to 24 months after. ie. Immediately, 1 hour after, 1 day after, 4 weeks after, 2 months after.

When to Send	immediately
Apply to these Inspection Types	immediately
Override Do Not Contact	1 hour
Sender Name	2 hours
Sender's Email	3 hours
To Email	6 hours
Subject	1 day
Live Preview of the Final Email	2 days
	3 days
	7 days
	10 days
	2 weeks
	3 weeks
	4 weeks
	6 weeks
	2 months
	3 months
	4 months
	5 months
	6 months
	7 months

- d) **Apply to these Inspection Types** – Correlates to the Inspection Types and Fees set up in your Profile. You may want a specific email to only apply to a 'Condo Inspection' for example.

Apply to these Inspection Types	ALL Invoice Line Item Types
Override Do Not Contact	Home Verified Premium report
Sender Name	Condominium Inspection
Sender's Email	Home Inspection up to 2000 SF
To Email	Home Inspection 2000 - 3000 SF
Subject	Home Inspection 3000 - 4000 SF
Live Preview of the Final Email	Home Inspection 4000 - 5000 SF
	Home Inspection 5000 - 6000 SF
	Home Inspection over 6000 SF
	Pre-listing Inspection less than 3000 SF

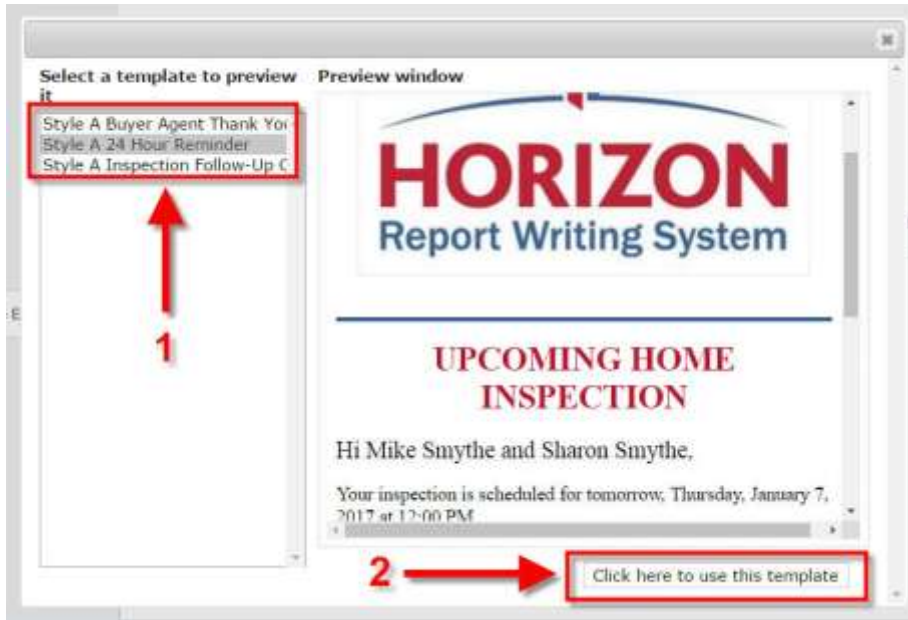
- e) **Override Do Not Contact** - Check it to Send even to clients flagged with Do Not Contact on the Work Order, e.g. the Inspection link email).
- f) **Sender Name** – This will typically be the COMPANYNAME from the list of tags. Right-click to use the Tag 'COMPANYNAME' below:
- g) **Sender's Email** – Use the Company Email here, or alternatively the Tag 'COMPANYEMAIL'.
- h) **To Email** – For this section you will want to insert a tag, like CLIENT1EMAIL. This is because the Client will always be a variable and not static like the Sender's Email. To send to both clients, use

CLIENT1EMAIL,CLIENT2EMAIL in this field. To send to agents, you can use BUYERAGENTEMAIL or SELLERAGENTEMAIL.

- i) **Subject** – This is the subject line that the recipient will see. This can be whatever you like, but may be, “Your Home Inspection at INSPECTIONADDRESSSHORT on INSPECTIONDATE”.
 - j) **Live Preview of the Final Email** – This is a preview of the email that will be sent to the client/agent. It is created from the HTML **Body** that is input below.
- 4) To work with one of our recommended Sample Templates, scroll down on the page and click **Sample Email Layouts**.



- 5) You will then be taken to this pop-up window. Select ‘**Style A 24 Hour Reminder**’ then choose ‘**Click here to use this template**’.



- 6) Click **OK** on this prompt:



- 7) It will drop this template into the Live Preview of the Final Email and to the Body. The body is where you will make any changes to the HTML. Changes made to the HTML will reflect 'real-time' in the Live Preview.

The screenshot displays an email editor interface. On the left, a sidebar contains the text "Live Preview of the Final Email" and "Body". A red arrow points from the "Body" section to the HTML code area. The main preview area shows the rendered email content, which includes the "HORIZON Report Writing System" logo, a heading "UPCOMING HOME INSPECTION", and a personalized message to "Hi Mike Smythe and Sharon Smythe". Below the message, there is a note about scheduling and contact information. The HTML code area, outlined in red, shows the underlying code for the email body, including DOCTYPE, charset, title, and various CSS and HTML tags for styling and layout. At the bottom of the editor, there are buttons for "Send out a test version of this Email", "Send test email now", "Save and Back", and "Cancel Changes".

- 8) The Body will start with <!DOCTYPE html>...This content will not show up in the email that is sent, it's purpose is so that the email is rendered properly across different web browsers and email clients, such as Microsoft Outlook, Gmail, Hotmail, etc.
- 9) The first thing that you can edit is the text for UPCOMING HOME INSPECTION, which is the heading of the email below the company logo. It is surrounded by HTML tags.

```

<div style="text-align:center; width:100%; padding-bottom: 9px; border-bottom-color: #306095;
border-top-width: 0px; border-bottom-width: 4px; border-top-style: none; border-bottom-style: solid;">
  
</div>
<p style="text-align:center;"><span style="font-size: 28px; color: #c30e2e; font-
weight:bold;">UPCOMING HOME INSPECTION</span></p>
<p style="text-align:left;"><span style="font-size: 20px;">Hi ALLCLIENTNAMES,</span></p>
<p style="text-align:left;">Your inspection is scheduled for tomorrow,
INSPECTIONDATELONGFORM at INSPECTIONTIME.</p>

<p style="text-align:left;">We look forward to seeing you there. If you have any questions, please call us at
COMPANYPHONE1.</p>

```

10) There are a few things you can modify:

```

<p style="text-align:center;"><span style="font-size: 28px; color: #c30e2e; font-weight:bold;">UPCOMING HOME
INSPECTION</span></p>

```

p-style – This value means the text is centered on the page. You could also use left, right or justify.

For example, using `<p style="text-align:left;">` will place the text to the left of the screen.

font-size – This is the size of the text. 28px is larger than normal, but it is for a heading so it is suitable here. A standard font size is 10 to 12 px.

color – This is the color of UPCOMING HOME INSPECTION. To change the color, modify the code after the #. To change it to black text, use #ffffff. A color-picker can be found here: <http://htmlcolorcodes.com/>

font-weight – If it is not bold, you can omit this completely (remove font-weight: bold) from the list of attributes.

11) The next few lines are:

```

<p style="text-align:left;"><span style="font-size: 20px;">Hi ALLCLIENTNAMES,</span></p>

```

```

<p style="text-align:left;">Your inspection is scheduled for tomorrow, INSPECTIONDATELONGFORM at
INSPECTIONTIME.</p>

```

ALLCLIENTNAMES – This is a **Tag** in Horizon. A tag pulls in information from the Work Order, or from your Horizon Company Info. Using this tag will insert both Client 1 and Client 2 names, ie. Mike Smythe and Sharon Smythe.

12) Other personal name tags available for use are:

BUYERAGENTFIRSTNAME | BUYERAGENTLASTNAME

CLIENT1FIRSTNAME | CLIENT1LASTNAME

CLIENT2FIRSTNAME | CLIENT2LASTNAME

INSPECTORFIRSTNAME | INSPECTORLASTNAME

SELLERAGENTFIRSTNAME | SELLERAGENTLASTNAME

13) The full list of tags is below for reference for use in email headings and body:

<p> ALLCLIENTNAMES BUYERAGENTEMAIL BUYERAGENTFIRSTNAME BUYERAGENTLASTNAME CLIENT1EMAIL CLIENT1FIRSTNAME CLIENT1FULLADDRESSDETAILS CLIENT1LASTNAME CLIENT2EMAIL CLIENT2FIRSTNAME CLIENT2FULLADDRESSDETAILS CLIENT2LASTNAME COMPANYSITY COMPANYCOUNTRY COMPANYFAX COMPANYLOGO COMPANYNAME COMPANYPHONE COMPANYPHONEOTHER COMPANYSSTATE COMPANYSSTREET COMPANYSUITE COMPANYWEBSITE COMPANYWEBSITEFORMATTEDASLINK COMPANYZIP DOWNLOADCONTRACTURL DOWNLOADFINALREPORTPDFURL DOWNLOADINVOICEASPDFURL DOWNLOADWORKORDERPDFURL FULLINVOICEASHTMLTABLE GOOGLEMAP </p>	<p> INSPECTIONADDRESSSHORT INSPECTIONDATELONGFORM INSPECTIONDATESHORTFORM1 INSPECTIONDATESHORTFORM2 INSPECTIONDAYOFWEEK INSPECTIONDURATION INSPECTIONFULLADDRESSDETAILS INSPECTIONTIME INSPECTOREMAIL INSPECTORFIRSTNAME INSPECTORLASTNAME INVOICESUBTOTAL INVOICETOTAL SELLERAGENTEMAIL ONLINEBOOKINGURL ONLINECONTRACTURL PAYINVOICEONLINEURL SELLERAGENTFIRSTNAME SELLERAGENTLASTNAME TITLEPAGEPHOTOURL TODAYSDATEDAY TODAYSDATEMONTH TODAYSDATETIME TODAYSDATEYEAR WORKORDERDATECREATED *REQUIRED_COMPANYCONTACTINFO *REQUIRED_UNSUBSCRIBELINK </p>
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13) To insert a tag, right-click inside of the body field and then click on the tag you would like to add. To delete a tag from the email template, simply highlight it with your cursor and press the delete key on your keyboard.

NOTE: The *REQUIRED_COMPANYCONTACTINFO and *REQUIRED_UNSUBSCRIBELINK must always be used before you can save the email.

14) You can make changes to the text in between the HTML tags. Here we will also change the second paragraph.

<p style="text-align:left">We look forward to seeing you there. If you have any questions, please call us at COMPANYPHONE1.</p>

15) We will change it to:

<p style="text-align:left">We look forward to meeting you at the property. If you have any questions, please call us at COMPANYPHONE1.</p>

16) To add an additional paragraph, you can copy and paste this line:

<p style="text-align:left">We look forward to meeting you at the property. If you have any questions, please call us at COMPANYPHONE1.</p>

17) Delete the text in between the <p> tags and replace it with your own.

18) Next, we will scroll back up to the top and set the following:

Email Name: Upcoming Home Inspection Reminder

Event that Triggers the Email: Before Date/Time of Inspection

When to Send: 1 day before

Apply to these Inspection Types: ALL Invoice Line Item Types (Unless you want the reminder to only send for specific inspections according to your Inspection Fees).

Override Do Not Contact: Leave un-checked

Sender Name: Right-click and choose the COMPANYNAME tag.

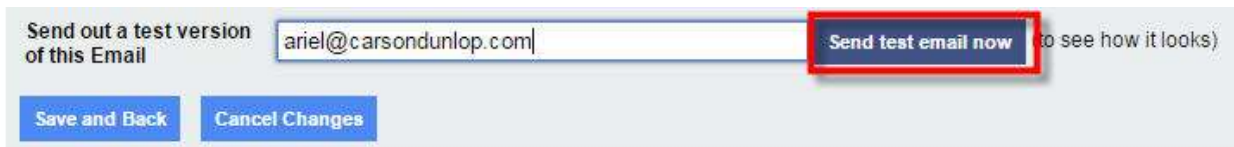
Sender's Email: Right-click in this field and choose the COMPANYEMAIL tag.

To Email: Right-click in this field and choose CLIENT1EMAIL. Put a comma, then right-click again and choose CLIENT2EMAIL. It should read as CLIENT1EMAIL,CLIENT2EMAIL.

Subject: Your Upcoming Home Inspection

19) Once your email is created and ready, send yourself a test using the option at the bottom of the page.

IMPORTANT: You should test your email on various email clients before enabling them to ensure that it renders properly, such as in Outlook & Gmail.



The screenshot shows a configuration interface for sending a test email. On the left, there is a label "Send out a test version of this Email". In the center, there is a text input field containing the email address "ariel@carsondunlop.com". To the right of the input field is a blue button with white text that says "Send test email now" and a smaller grey text "(to see how it looks)". Below the input field and button are two blue buttons: "Save and Back" and "Cancel Changes". The "Send test email now" button is highlighted with a red rectangular box.

20) At the bottom of the screen, click **Save and Back**.

21) The default for the email is **OFF**. Switch it to **ON** to activate the email.

Horizon Marketer Email List

Create or edit your automated Horizon Marketer emails here. These are template-based emails that are automatically sent to your clients, inspectors, staff, or agents in response to work order and report writing events.

We provide lots of templated content to help you look professional!

Name	Send	Trigger Event	Applies to	
Upcoming Home Inspection Reminders	<input checked="" type="checkbox"/> On	1 day Before	Before Date/Time of Inspection	ALL Invoice Line Items
				Delete Unsubscribe

[<< Back](#) [Create a new Auto Email](#)

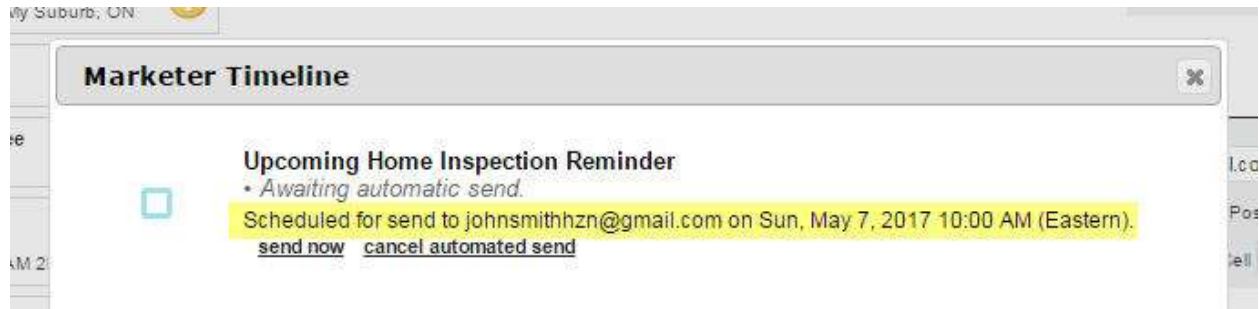
Note: This will only take effect for any new work orders created going forward. To keep track of these emails, click on the **Horizon Marketer Timeline** button in the work order screen.

The screenshot shows the Horizon Marketer interface for a work order. The top navigation bar includes 'Home', 'Scheduler', 'Book Inspection', 'Profile', 'Order', 'Help', and 'Logout'. The main content area is divided into several sections:

- Status:** Tentative, Inspection Address: 1239 Pharmacy Avenue, Report #: 1168
- Client Information:** Client 1: John Smith, Contract not yet accepted. Includes a 'callback' button.
- Attendees:** Buyer, Buyer's Agent, Seller, Seller's Agent, Other. Includes a 'DO NOT CONTACT CLIENT' checkbox.
- Contract:** Contract not yet accepted, Accepted, Rejected.
- Client 1 Info:** First + Last Name: John Smith, Company, Email: johnsmith@zri@gmail.com, Address, Sube, City, Zip/Postal, Country/State: Canada, Ontario, Bus. #, Home, Cell.
- Client 2 Info:** First + Last Name, Company, Email, Address, Suite, City, Zip/Postal, Country/State: Canada, Ontario, Bus. #, Home, Cell.
- Other:** test, test.

The 'Horizon Marketer Timeline' button is highlighted with a red box and a red arrow pointing to it.

22) It will display the following reminder:



23) You can leave it as-is, or force-send by clicking **send now** if you choose to do so. You can also cancel the email from going out by clicking **cancel automated send** (as long as the criteria was not 'immediately after' and the time has not passed yet).

If you have any questions, please contact us at 1-800-268-7070 ext. 259 or by submitting a support ticket.