Creating a Base Email Template

Overview

As a marketing administrator, the email template creator lets you empower end users to create personalized email templates based on a single, organization-wide base template while still requiring any personalized templates to be approved before being sent to contacts.

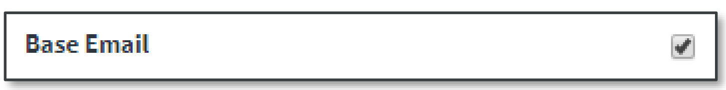
This allows end users to create their own content quickly with their preferred message without having to involve marketing administrators, saving time and frustration for both.

Creating a Base Template

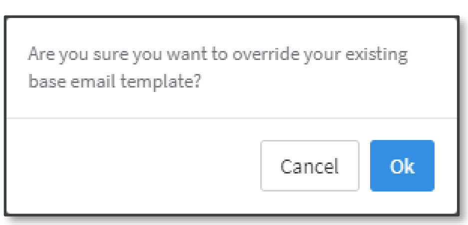
1. Navigate to **Email Marketing → Emails**.
2. Click the **Add Template** button at the top of the page.
3. Enter a name for the template in the Create Email dialog box.
4. Click the **Create Email** button.
5. In the email editor, enter any text or placeholder elements into the Message Body section. End users can modify this as they build their personalized templates.

Tip
Include any standard branding that should be in every email sent. Use snippets to include the sender's signature block and relevant disclaimers. These will insert the appropriate text for any user who creates a personalized template based on this, even if that text changes later.

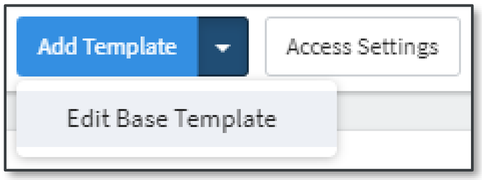
6. In the settings panel on the left side, scroll down to the Sections section and check the **Base Email** option.



7. Make any other relevant settings selections.
    a. You must enter a subject line for the template before you can save it. End users will not see this as they build their personalized templates. They will enter their own subject lines.
8. Click the **Save Email** button at the top of the page.
9. In the confirmation dialog box, click the **Ok** button to confirm that this will become the new base template for your organization, overriding the previous selection. (The previous base template is not deleted, but users will no longer see it unless they have otherwise been granted access to it.)



If you need to make updates to the organization's base template, you do not have to hunt for it in your list of email templates. From the email list, click the drop-down arrow next to the Add Template button and select **Edit Base Template**. This takes you directly to the email editor for whichever template is currently designated as your organization's base template.



Tip
Each end user can create as many personalized templates based on the base template as they like, so make the base template as general as you can, while still including necessary universal elements.

Assigning Access

You can allow or deny access to the base template at the organization level and/or for individual user roles. Settings at the user role level override the organization-wide setting for those roles.

1. Navigate to **Email Marketing → Emails**.
2. Click the **Access Settings** button at the top of the page.
3. In the Access Settings dialog box, expand the **Organization** section.
4. Click the **✓Allow Access** button. This will give every user in your organization access to the base template (unless their role is specifically denied access).
    a. (optional) In the Add Access dialog box, select an approval flow. This will apply to every personalized template created by any user in the organization.
    b. Click the **Submit** button.
5. The Access Settings box updates to show your selections. The button changes to **ØDeny Access**. Clicking this would prevent any user in the organization from seeing the base template (unless their role is specifically allowed access).
6. Expand the **Roles** section. (The Organization section collapses automatically.)
7. Click the **+Add Role** button and select a user role from the drop-down list.
    a. (optional) In the Add Access dialog box, select an approval flow. This will apply to every personalized template created by any user assigned to the role you selected.
    b. Click the **Submit** button.
8. The Access Settings box updates to show your selections. A green check mark in the Allow Access column indicates that the role has access to the base template (even if the organization is denied access).
9. Click the Actions button for the role you added and select **Edit Access**.
10. Select a new approval flow and click the **Submit** button. This is the only option to edit.
11. Click the Actions button and select **Deny Access**.
    a. The Allow Access column updates to a red "no entry" symbol, indicating that the role does not have access to the base template (even if the organization has access).
12. Click the Actions button and select **Clear Access**.
    a. The entry for this user role is removed from the table. Access for users with this role (and any other role not listed here) is determined by the setting at the organization level.

13. Apply steps 3 through 12 until you are satisfied with the combination of settings.

Note
At the organization level, you can only allow or deny. However, you can individually allow or deny any number of user roles. Remember that when a user role selection conflicts with the organization selection, the user role selection takes precedence for that role.

14. Close the Access Settings dialog box.

Warning
You should always assign an approval flow whenever allowing access (to either the whole organization or to individual user roles). If you do not assign an approval flow, an end user will be able to create personalized templates without oversight.

Once the base template is available to end users, they can use it to create personalized templates. Assuming you assigned an approval flow above, they will not be able to send any email using their personalized template until the specified approval flow has been completed.