Creating an Email Template

Introduction

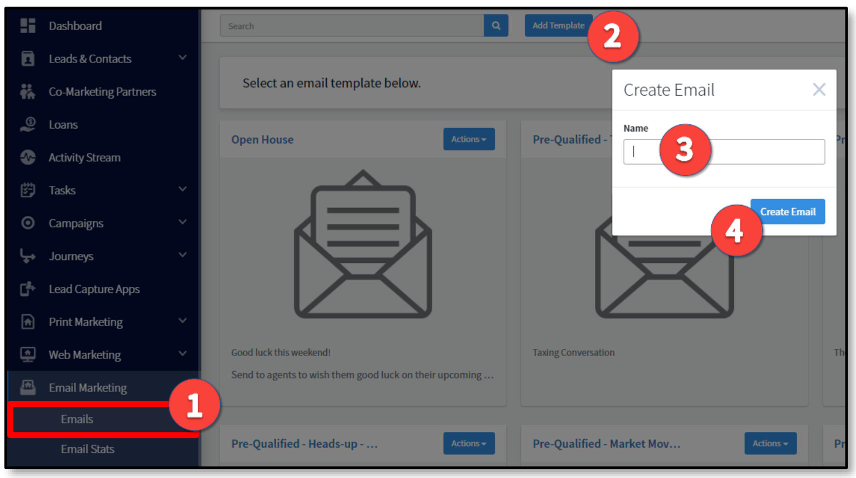
As a marketing administrator, you can set up email templates for users in your organization to send to their contacts. Templates can also be used as part of an automatic campaign. These templates can involve as much or as little content as you like, can be set up as plain text or with HTML formatting, and can be saved for as long as necessary.

You can then assign access to use the new template (and remove that access when the content is no longer relevant). Access can be assigned to (or removed from) teams or individual users in your organization.

Users with access to the template can send an email to a selected group of their contacts. Depending on the options you select when assigning access, a user may have the option to edit the template before sending. You can require that, if a user does modify a template, the customized version is reviewed and approved before it can be sent to any contacts.

Setting Up a Template

1. Navigate to **Email Marketing → Emails**.
2. Click the **Add Template** button at the top of the page.
3. Enter a short, but meaningful, name for the template in the Create Email box.



Note
The name is not the subject line that would be sent with emails based on the template. This name is only visible to users in your organization to help them understand which template to use. You can modify the initial name that you enter here in the email settings later.

Tip
Use a planned, consistent naming scheme for your email templates. Names should be short, but meaningful.

4. Click the **Create Email** button. The email editor opens.

Settings

There are several settings along the left side of the page that pertain to the email currently being edited. Strictly speaking, all of these settings except the Name and Subject are optional. However, you should also always include a description and any other information necessary to completely define the template and keep your library organized.

See *Organizing Your Content Library* for suggestions on using settings to make each item in your library searchable and understandable for users. Email settings may be part of a larger system including print and social media content in your Total Expert library.

Tip
Click the **Save Email** button at the top of the page frequently. The email editor does not auto-save your progress at any time. (This allows you to revert to the last saved version by simply reloading the page.)

Note
The exact combination of options available to you depends on the permissions assigned to your user role. You may not see all the options described below. If you do not see an option you think you should, please contact your system administrator.

Email Settings

- The **Name** field shows the name you entered in step 3 above. You can change the name here.
- In the **Subject** field, enter the subject line that should be applied by default to any emails sent using this template. When this template is used, the user may be able to change the subject line their recipients will see in their inboxes. You cannot save an email template without entering anything in this field.
- In the **Description** field, enter any text that will help users locate and understand this email in their library. Anything in this field will be visible with the listing and searchable by the end user but will not be included with the email sent to recipients.
- In the **Thumbnail** field, click the **Choose File** button and select an image file to upload. This image will be shown with the listing in the email library.
- Check the **Append Email Signature** box to automatically include an email signature block at the end of the body of the email. This uses the signature defined at **settings menu → Email Settings** for each user who sends an email using the template.
- Check the **Transactional Email** box to indicate that the template is for transactional emails. A *transactional* email is one that is considered important messaging for a customer transaction or account. This designation gives any email based on the template priority over marketing emails and ensures it is sent, even when the customer has unsubscribed from marketing emails.

Warning
Because a transactional email is sent even to contacts who have unsubscribed from marketing emails, this should only be checked for an email that contains important information about the recipient's loan or account.

- Check the **Bypass all email de-duplication** box to allow emails using this template to be sent to the same email address multiple times in the same day. This is normally only used for testing purposes and would be turned off again before making the template available to end users.

Categorization Settings

- Click the **Folder** field and select one or more pre-defined folders to be applied to the email template.
- Click the **Organization Tags** field and select one or more pre-defined tags to be applied to the email template. Alternatively, you can create a new tag and apply it by typing the name of your new tag in the box and pressing [Enter].

You can remove a folder or tag from the template by clicking the small **x** next to its name.

Folders and tags applied to email templates are not visible in the list or grid views of the library, but users can filter their library view via the drop-down menus at the top of the screen.

Tip
Use folders to designate broad categories, such as Holidays. Use tags to indicate more specific topics, such as Halloween or Independence Day.

Email Access Settings

These settings apply to all users in your organization. To provide access to individual users or teams, see Assigning Access Settings below.

- Check the **Grant access to all users.** box to make the template available to every user in your organization.
- Check the **Grant access to user co-marketing partners.** box to make the template available to co-marketing partners of every user in your organization who has access to the template. If a user in your organization does not have access to the template, none of that user's co-marketing partners will have access, even if this is checked.
- Check the **Grant editing capabilities to all users.** box to allow users with access to the template to be able to edit the body and subject line of the email before sending. If this is not checked, users with access to the template will only be able to select the recipients of the message and the time and date they want to send it.

Tip
Wait until you are finished editing the template before assigning access settings. If you assign access while you are still setting up the template and save it, users with access will see the draft in their libraries. Once you are satisfied with the template, assign access either using these options (being sure to save afterward) or via User Settings and Team Settings.

Compliance Notification Settings

Both of the following settings must be defined for the threshold notification to work.

- Enter a value in the **Compliance Notification Threshold** field. This value determines the maximum number of recipients a user may select to send this email template to at one time before a notification is sent to the selected user(s). If a user selects exactly this number of recipients, the emails will send without triggering a notification. If you enter 0, no notifications will ever be sent.
- Click the **Compliance Notification Recipient(s)** field and select one or more users in your organization to receive a notification when a user sends emails using this template to more recipients than the threshold value defined above.

Sections

Check the boxes for the following attributes to designate the template as having that attribute.

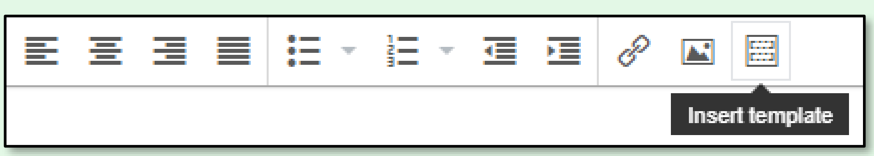
- **Video** – This designates the email template as a video template. This means any user attempting to send an email using this template must select a BomBomb video to include before the email can be sent. (The user must have a BombBomb account integrated in Total Expert to do this.) When you create the body of the email, include any of the video-related placeholders; they will populate the relevant information or content related to the specific video the sender has selected when the message is delivered to the recipient.
- **Loan Status** – This designates the email template as a loan status template. This means a user can only send an email using this template from the loan list page, not the usual email library. When you create the body of the email, include loan-related placeholders, which will populate from the loan selected by the sender when the message is delivered to the recipient.
- **Base Email** – This designates the email template as the base template for your organization. Users with access to it will then be able to create individual templates for their own use starting from this base template. A base template might include branding and company-wide contact information. If you select this option, when you save the template, you will be prompted to confirm that this template should become your organization's new base template, overriding the previous selection.

Message Body

On the right side of the page is a rich text editor where you can create the email template itself. Quite a few text formatting options are available, including font type, style, and size; alignment and indents; and bullets and numbering. In addition, you can add text placeholders, tables, links, images, and videos. Using these features is similar to most text editing platforms.

Text placeholders are especially powerful. These draw information from the contact record or other related information (such as a loan) of each recipient of the email, so you can set up an email template and send as many copies of it as you like; each copy will be personalized with information for the specific recipient, even when multiple recipients are selected. For example, you could type Dear {{ recipient.f_name }}, at the beginning of the body; when a message using this template is sent, this greeting in each copy of the email would populate with the first name of the person that copy of the email is being sent to.

Tip
You can type placeholders in manually if you know them, but you can also click the **Insert template** button at the right end of the toolbar in the email editor, select the desired option from the drop-down menu in the Insert template box and click the **Ok** button.



If you have an HTML file you would like to use as an email, clear out anything in the text editing area, then select **View → Source code**. Paste your HTML file in the Source code box and click the **Ok** button.

TOTAL EXPERT

Note
If your user role has permission to create a base template, the editor opens with a blank email body. If your user role does not have this permission, the editor opens with the body of the base template populated—however, you can edit this as much as you like to create a new template.

Finalizing the Template

As you work on an email template, click the **Preview** button in the upper-left corner of the page to open a box in your browser with a rendering of what the email would look like. Text placeholders are filled in where possible (because no recipient is selected, any placeholders relating to the email recipient or their loan is shown as the placeholder in the preview). Layout and formatting should reflect what a recipient would see.

If you want a more complete sense of what a final email would look like in a recipient's inbox, click the drop-down arrow next to the Preview button and select **Email Preview To Me**. This sends a copy of an email based on your template to the email address associated with your account. Your user will be treated as both sender and recipient for the purposes of populating any placeholder information.

When you are satisfied with the email template you have created, including the settings you have selected, click the **Save Email** button. If you do not want to assign access to all users via the Email Access Settings options, you will need to provide those settings at the user or team level.

Assigning Access Settings

You can allow users in your organization to use an email template on a user-by-user basis or by assigning access to whole teams at once. The steps are almost exactly the same whether you are assigning access to individual users or to teams.

Warning
Ensure you have saved your template before navigating away from the email editor! Unsaved changes will be lost.

1. Navigate to **Email Marketing → Emails**.
2. Locate your new template in the list and select **Actions → User Settings** (or **Actions → Team Settings**). A table of users (or teams) in your organization appears; note that the user who created the template is allowed to access it and edit it when sending; all other settings are initially blank.
3. Select the checkboxes for the users (or teams) you want to provide access to.
4. Click the **Change Settings** button that appears at the top of the page.
5. In the slide-out panel on the right side of the page:
    a. Select the **Add Access** option.
        - If you select Deny Access instead of Allow Access when you submit the form, the selected users (or members of the selected teams) will not be able to access the template.
        - If you select Clear Access instead of Allow Access when you submit the form, the setting is reverted to neither allow nor deny access.
        - See below for how access settings interact for teams and users.
        - If you select either Deny Access or Clear Access, the remaining options are hidden in the slide-out panel because they would only apply if access is allowed.

b. (optional) If you want the co-marketing partners of the selected users (or of members of the selected teams) to have access to the template as well, check the **Allow Co-Marketer Access** box. If this is unchecked, none of the users' co-marketing partners will have access to the template.

c. (optional) If you want the selected users (or members of the selected teams) to be able to customize the text of an email based on this template, check the **Allow editing when used as a template.** box. If this is unchecked, any user sending an email using this template will only be able to select recipients and the time and date when the message will be sent.

d. (optional) If you want to require that the selected users (or members of the selected teams) must have their draft based on this template reviewed before it can be sent, select an appropriate option from the **Approval Flow** drop-down menu. Approval flows must be set up in advance.

Note
The approval flow feature is a compliance safeguard; for more information, see *Approval Flows*.

Tip
Ensure that any approvers are aware of their responsibility and the process for approving an email. Prompt reviews will help encourage users to engage with the Total Expert platform.

e. Click the **Submit** button at the top of the panel. The panel closes.

Note that the page refreshes and the table reflects the changes that you made. If you want to give different access to different subsets of users (or teams), you can follow the steps above again with new users (or teams) selected in step 3.

User settings override team settings. Team settings apply to a user on the team if no conflicting user setting has been set.

If an individual user has been neither allowed nor denied access, their access is determined by falling back to their team's setting. If neither the user nor the team setting has been set for a user, that user will not have access.

Example

• If user Bob is part of a team that has been given access to a template, but Bob is denied access as an individual user, then Bob will not be able to use the template even though his team has access. In this case, if the user setting for Bob is cleared, he will gain access (because the team setting would then apply).

• Conversely, if that team is denied access, but Bob is given access as an individual, then Bob will be able to use the template even though his team cannot. In this case, if the user setting for Bob is cleared, he will lose access.

• In either case, if the team setting is changed or cleared, Bob would not see any difference in access because the user setting that was already determining his access remains in force.