



# Using a Base Email Template

## Overview

As an end user, the email template creator empowers you 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 you to create your own content quickly with your preferred message without having to involve marketing administrators, saving time and frustration for both of you.

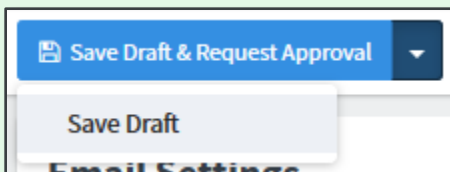
## Personalizing a Template

When your organization sets up a base template and allows you access to use it, you can create as many personalized templates based on it as you like. If the administrator required an approval flow for the organization or your user role, each personalized template must be approved before you can use it to generate individual email messages.

1. Navigate to **Email Marketing → Emails**.
2. Click the **Add Template** button at the top of the page.
3. Enter a name for your template in the Create Email dialog box.
4. Click the **Create Email** button.
5. The email editor opens. Note that the message body already has content included, as defined in the organization's base template.
6. Make any changes to the body that you want included in your personalized template.
7. Enter a subject line for your template in the **Subject** field in the Email Settings panel on the left. (This subject will be populated by default for any messages created from your personalized template.) You cannot save the template without a subject line.
8. (optional) Enter any notes about your template you would like the approver to see while reviewing your submission.
9. Click the **Save Draft & Request Approval** button at the top of the page.

### Tip

If you are not yet ready to submit your template for approval, click the drop-down arrow and select Save Draft. You can then return to edit and submit the template later.



Once you submit your personalized template, you can see it in your list of emails with a Draft label applied; you cannot send emails using the template until it has been approved. When you submit a personalized template for approval, it routes through approval flows just like any email normally would.



Once it has been approved, the Draft label is removed, and you can send a message to your contacts using this template. Select **Actions → Send**, select recipients, and send the message as you would with any other approved template.

If you select **Actions → Edit** and make changes to your personalized template, it will need to be approved again before you can use the updated version to send emails. You can continue to use the previously approved version in the meantime.

#### Note

When you open your personalized template to send it out, you are reminded that editing it will require that particular edit to be approved before sending to your selected recipients. If you click the **Yes, Edit This Message** button, it will be routed for approval, even if you do not actually change anything in the template.