How to Create and Use Email Templates

In this video we will discuss how to create and use email templates.

Email templates can be a time saving way of creating a clean and well thought out email communication strategy for your organization including your branding colors, logos, and fonts. These templates can be created either on the send alerts screen or on the template screen.

For the purposes of this video we are going to create an email template from the template screen by inserting pre-designed HTML code.

To begin, select the templates tab in the alerts drop down menu. Then select email as the template type. Next, we have the option to select a template category. Categorizing templates is an easy way to organize messages especially for organizations with multiple templates or users with send privileges. We've labeled this category as "holiday". For each holiday template that we create we'll select "holiday" under the template category drop down menu so that all our holiday templates will be in the same category.

Next create the template. Remember for this example we're using a pre-made HTML template. Let's enter the subject line first followed by the template id number. Now simply click on the button at the bottom of the message box labeled HTML and then paste in the code into the message box.

To review your work, we'll click on "design" so that we can view the actual design and insure that it looks correct.

From here we simply click the save button below, once saved, we can view our template at the bottom of the template screen.

To use your template simply go to your alert screen. Select email as your message type, then under Message Subject you'll have the ability to select your template. Click on insert template to view your template in the message box and proceed with your alert.

Thanks for watching! If you have more questions, please feel free to contact our Customer Success Team at support@highgroundsolutions.com.