# **Email Template Management**

18 Steps <u>View most recent version</u>

Created by Engagifii Inc. Creation Date Jan 07, 2025 Last Updated Jan 07, 2025



# **Click on Communications**

🚱 Engagifii	≡	
•] My Area	>	Welcome Diana Prince! 🖋
Relationships	>	
🖧 Communications	>	
\$ Revenue	>	
▶ Legislation	>	
🛉 Events	>	
🗟 Training	>	
Settings and Configuration	>	

## STEP 2

# **Click on Email Templates**

L°J	,		weicome Diana Prince! 🖉
	Relationships	>	
4. 4. ja	Communications	~	
	Compose a Message		
	My Message Center	>	
	Email Templates		
\$	Revenue	>	
~	Legislation	>	
ŧ	Events	>	
ß	Training	>	
	· · · · - ·		



## Click on Add a Template to create a new Template

Home / 🛕 Com	munications / 🖽 Email Temp	lates		
S 🖪 En	nail Templates	다. Add a Template		
Searce	h Template Name	a	↓ Created By	

#### STEP 4

## Type in Template Name and optional description

Home / 🛕 Communications / 🖽 Email Templates			
c 😑 Email Templates			Х т <i>У</i> ~
Template Name*			
Conference Reminder			
Description ← → Paragraph →  Source	<u>A</u> ~ <b>B</b> <i>I</i> <u>∪</u> <del>S</del> ; <u></u> <u></u> ~		
			Cancel 🛛 🖹 Save & Continue 🗸 🗸
Search Template Name	Q - Created By	Last Updated	
	No data	a found	



## **Click on Save & Continue**

Cancel Save & Continue ast Updated \$ Last Used		
ast Updated 🗢 Last Used		Cancel Save & Continue 🗸
	ast Updated	Last Used

## STEP 6

# Type in Subject of Email Template

fii ∎	
د	🏶 Home / 🛕 Communications / 🖽 Email Templates / 🖽 Email Template Detail
2	Conference Reminder
s 、	
Message	Subject Summer Showdown Reminder
e Center	
alates	$ \begin{tabular}{ c c c c } \hline \begin{tabular}{ c c c } \hline \begin{tabular}{ c c } \hline tabul$
,	
د	
د	
2	
nfiguration	



## Click on text box to begin creating your template.

From the toolbar, you can add images, media links and format as you would with any email editor.

Home / A Communications /   Em Em	un rempiares / 🖽 Emain re	omprove Detail												
Conference Reminder 🖉														@ @ >
Add Description 🖋													🔤 Se	end a Message
Subject: Summer Showdown Rem	nder												Cancel	🗎 Save
		<b>T</b> 11	0 1-				4=			-	0			
← → Paragraph ✓	<u>A</u> • <b>B</b> • B	1 0	5 2-	v := v	′∣ ≌ ⊨	=   AI ~	A⁼ ∽	≞ •   ⊞	لئما ~ 🗄	~ Þ ~	<i>w</i> –	X <sup>2</sup> X	2	
We're excited to remind you that Event Details Date: [Conference Date(s)] Cocation: [Venue Name, City,	or Virtual Platform Link	[]	:/weeks] aw	ay! Here's e	everything y	you need to	o know to	o make the n	nost of this	incredible	event:			
Event Details	or Virtual Platform Link with timezone if appli ncluding [Name, Title, a on [topics or themes].	(] cable] ind/or Orga	anization].			you need to	) know to	• make the n	nost of this	incredible	event:			
Event Details Date: [Conference Date(s)] Cocation: [Venue Name, City, Time: [Start Time – End Time What to Expect Inspiring keynote speakers, ii Engaging breakout sessions	or Virtual Platform Link with timezone if applion ncluding [Name, Title, a on [topics or themes]. h [describe audience, e dance] if you haven't al your day. [Include link t	cable] and/or Orga e.g., industr ready. [Incli	anization]. ry leaders, p			you need to	ð know to	n make the n	nost of this	incredible	e event:			
Event Details Date: [Conference Date(s)] Cocation: [Venue Name, City, Time: [Start Time – End Time What to Expect Inspiring keynote speakers, i Engaging breakout sessions Networking opportunities with Don't Forget to: Register/Confirm your atten Review the agenda and plan	or Virtual Platform Link with timezone if appli hcluding [Name, Title, a on [topics or themes]. h [describe audience, e dance] if you haven't al your day. [Include link t eminders!	(] cable] and/or Orga a.g., industr ready. [Incli ro agenda]	unization]. ry leaders, p ude link]	eers, exper	rts].				nost of this	incredible	e event:			



## **Click on Save**

	<b>≞</b> û ×
	Send a Message
	Cancel 📔 Save
	<sup>2</sup> × <sub>2</sub> 😀
<i>w</i> to make the most of this incredible event:	

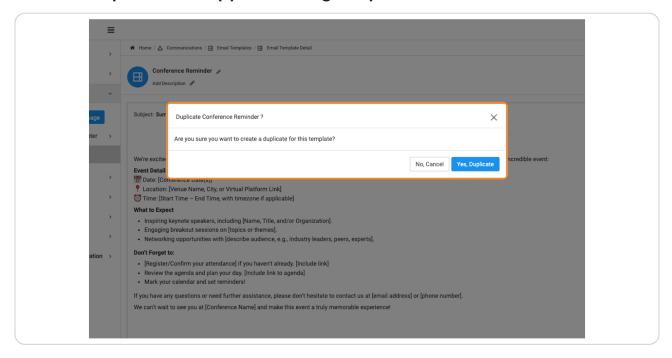
#### STEP 9

# You have the option to duplicate an existing template by clicking on this icon.

Diana Prince ~
Duplicate
Send a Message
Sec. Edit

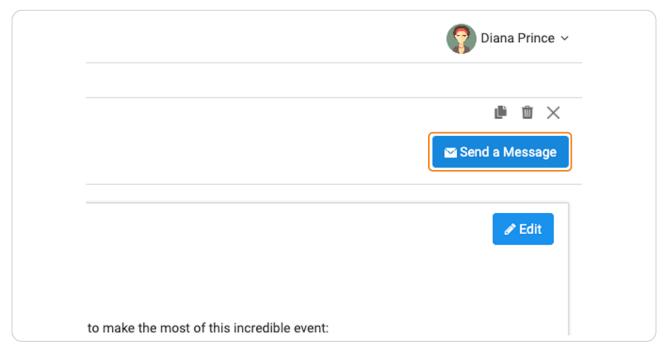


Click on Duplicate to copy an existing template.



#### **STEP 11**

## Click on Send a Message to use this template to send a new message





You'll see the name of the template that you are using to send the email

gagifi	i =	Dia
a	Email To Many People	
nships	From: 🚯 Diana Prince (dianaprince1@yopmail.com) 💿	
unications	Reply To: 🚯 Diana Prince (dianaprince1@yopmail.com) 💿	d a
	To: Start typing here to search Cc Bcc	
ompose a Me	Email Template: Conference Reminder  V	
y Message C	Subject: Summer Showdown Reminder	
nail Templat	→ → Paragraph → ② Source ▲ → ▲ → ■ → ■ I U ↔ □ → □ → □ → □ → □ → 0 → □	
se ition g	We're excited to remind you that [Conference Name] is just [X days/weeks] away! Here's everything you need to know to make the most of this incredible event: Event Details Totat: [Conference Date(s)] P Location: [Venue Name, City, or Virtual Platform Link] Time: [Start Time – End Time, with timezone if applicable] What to Expect u Inspiring keynote speakers, including [Name, Title, and/or Organization].	
is and Config	Inspiring vertices speakes, including value, rine, and/or organization;     Engaging breakout sessions on [lopics or themes],     Vetworking opportunities with [describe audience, e.g., industry leaders, peers, experts].  Don't Forget to:     [Register/Confirm your attendance] if you haven't already. [Include link]  Attach Files	
	Signature: Standard Signature Perferit  Cancel Update Template Save as New Template Send	

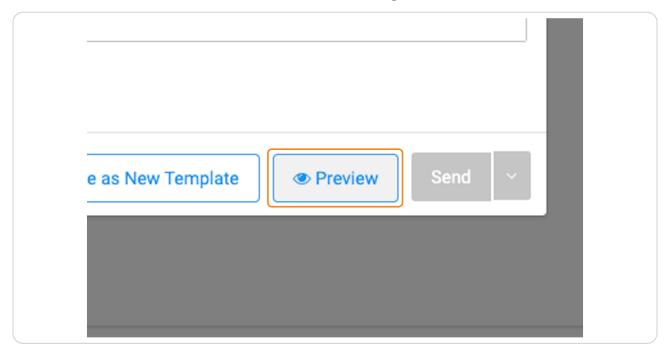


You can update any details in the template before sending and either update the existing template or save it as a new template

€ Engagifi € My Area	Email To Many People	
Relationships	From: (	3
Compose a Me	To: Start typing here to search CC BCC Email Template: Conference Reminder ·	1
My Message C	Subject: Summer Showdown Reminder $\bigcirc \bigcirc$ Panagraph $\checkmark \bigcirc$ Source $\land \checkmark \blacksquare \lor \square \lor \oslash \multimap \multimap \blacksquare \lor \blacksquare \lor \oslash \multimap \multimap \blacksquare : $	
\$ Revenue	We're excited to remind you that [Conference Name] is just [X days/weeks] away! Here's everything you need to know to make the most of this incredible event: Event Details	
🛉 Events	Image: Start Time - End Time, with timezone if applicable]	
© Settings and Config	What to Expect         • Inspiring keynoles speakers, including [Name, Title, and/or Organization].         • Engaging breakout sessions on [topics or themes].         • Networking opportunities with [describe audience, e.g., industry leaders, peers, experts].         Don't Ferget to:	
	Register/Confirm your attendance) if you haven't already. [Include link]     Attach Files	
	Signature: Standard Signature Definer Cancel Update Template Save as New Template Signature Cancel	
$\bigcirc$	Copyright © 2025 ENGAGIFII Inc All Rights Reserved. [Privacy Policy	



## Click on Preview to view email before sending



#### **STEP 15**

## From Compose a Message, you can also access the email templates

Relationships	>		
\$ Communications	~		
Compose a Message			
My Message Center	>		
Email Templates			
\$ Revenue	>		

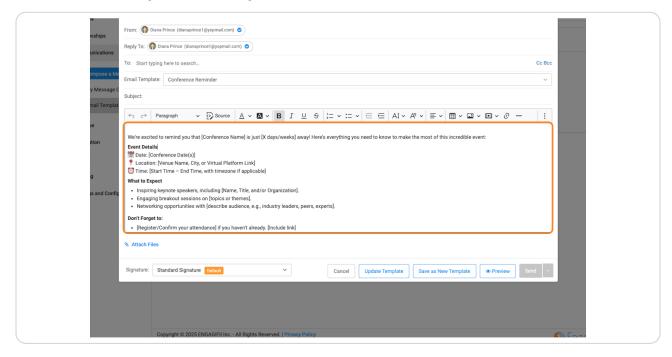


Click on Select to pick your email template

Email To Many People	_ × ×
om: 🚯 Diana Prince (dianaprince1@yopmail.com) 📀	
sply To: 🚺 Diana Prince (dianaprince1@yopmail.com) 💿	
x Start typing here to search	Cc Bcc
nall Template: Select	~ )
Jbject:	
$\Leftrightarrow \ \Leftrightarrow \   \ Paragraph \qquad \lor \ \textcircled{2} Source \   \ \underbar{A} \lor \ \fbox{1} \lor \   \ \textcircled{3} \lor \ \fbox{1} \lor \ \fbox{1} \lor \ \fbox{1} \lor \ \textcircled{3} \lor \ \fbox{1} \lor \ \textcircled{3} \lor \ \textcircled{3} \lor \ \fbox{3} \lor \ \r{3} \lor \$	2 — I
Best, Diana Prince Administrative Assistant	
Attach Files	

#### **STEP 17**

## You can edit as you normally would.





You have the option to select your email signature, update the existing template, save it a a new template, preview and send.

From:	: 📢 Diana Prince (dianaprince 1@yopmail.com) 💿	
Reply	To: ( Diana Prince (dianaprince1@yopmail.com)  O	
	Start typing here to search	Co Boo
	Template: Conference Reminder	~
Vy Message C Subje	et.	
mail Templat	$\begin{array}{c c c c c c c c c c c c c c c c c c c $	:
ue		
lation	re excited to remind you that [Conference Name] is just [X days/weeks] away! Here's everything you need to know to make the most of this incredible event: nt Details	
	Date: [Conference Date(s)] Location: [Venue Name, City, or Virtual Platform Link]	
na	Time; [Start Time – End Time, with timezone if applicable] at to Expect	
as and Confic	Inspiring keynote speakers, including [Name, Title, and/or Organization]. Engaging breakout sessions on [topics or themes].	
•	Networking opportunities with [describe audience, e.g., industry leaders, peers, experts].	
	( <b>* Forget to:</b> [Register/Confirm your attendance] if you haven't already. [Include link]	
⊛ Att	tach Files	
Signa	ature: Standard Signature Default  Cancel Update Tempiate Save as New Tempiate Send	
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13 of 13