

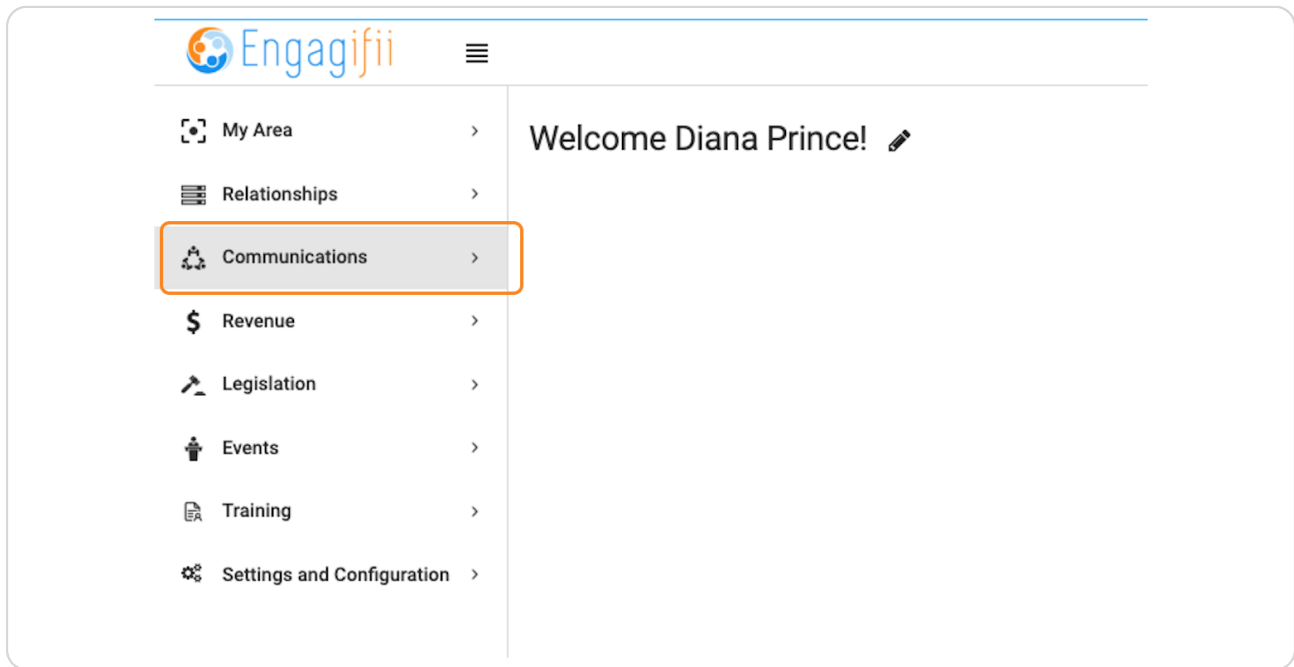
Email Template Management

18 Steps [View most recent version](#) 

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

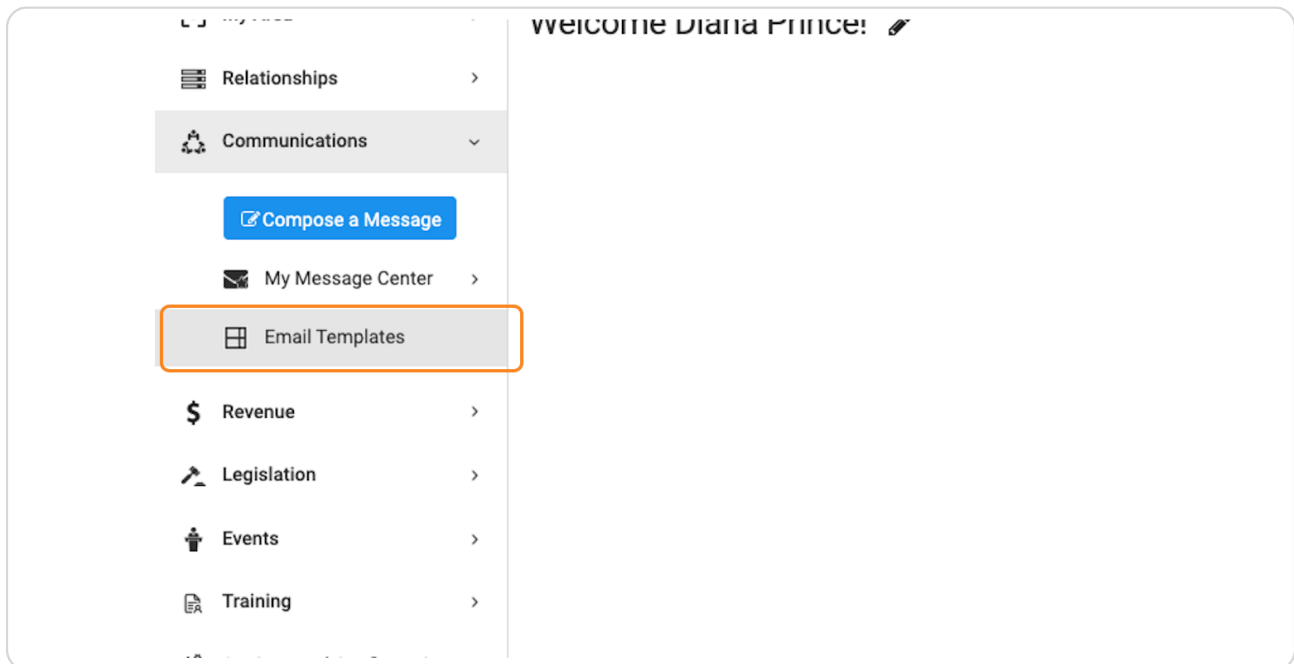
STEP 1

Click on Communications



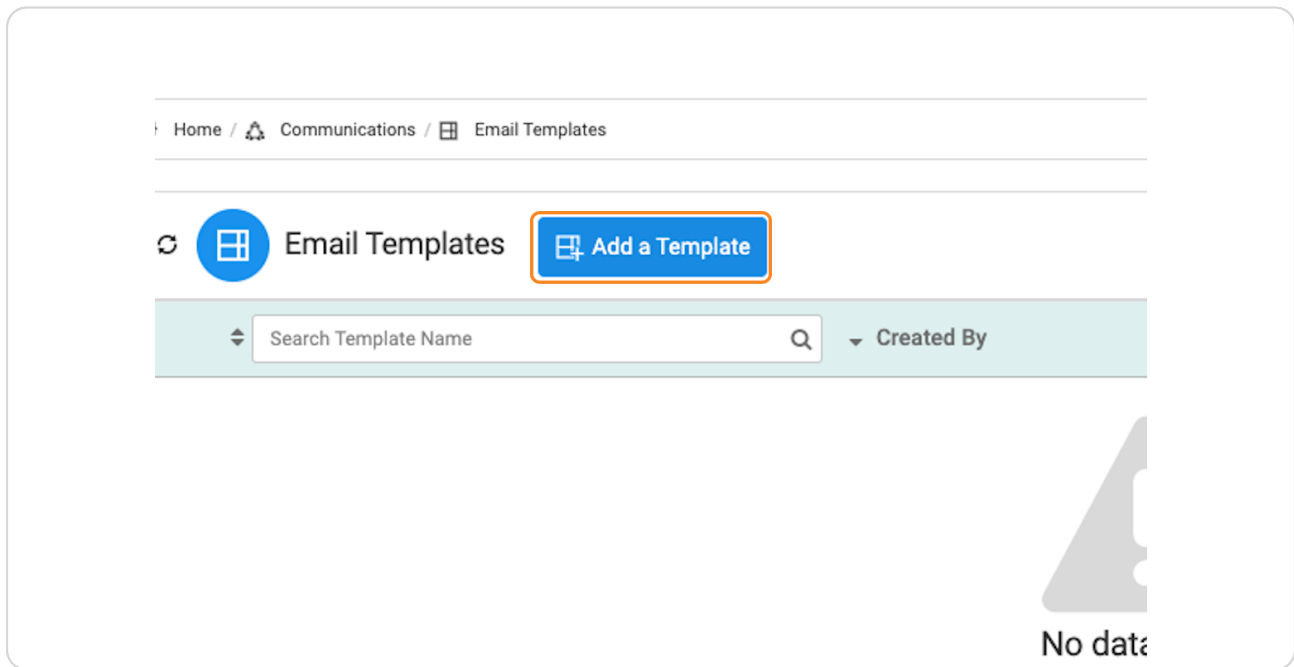
STEP 2

Click on Email Templates



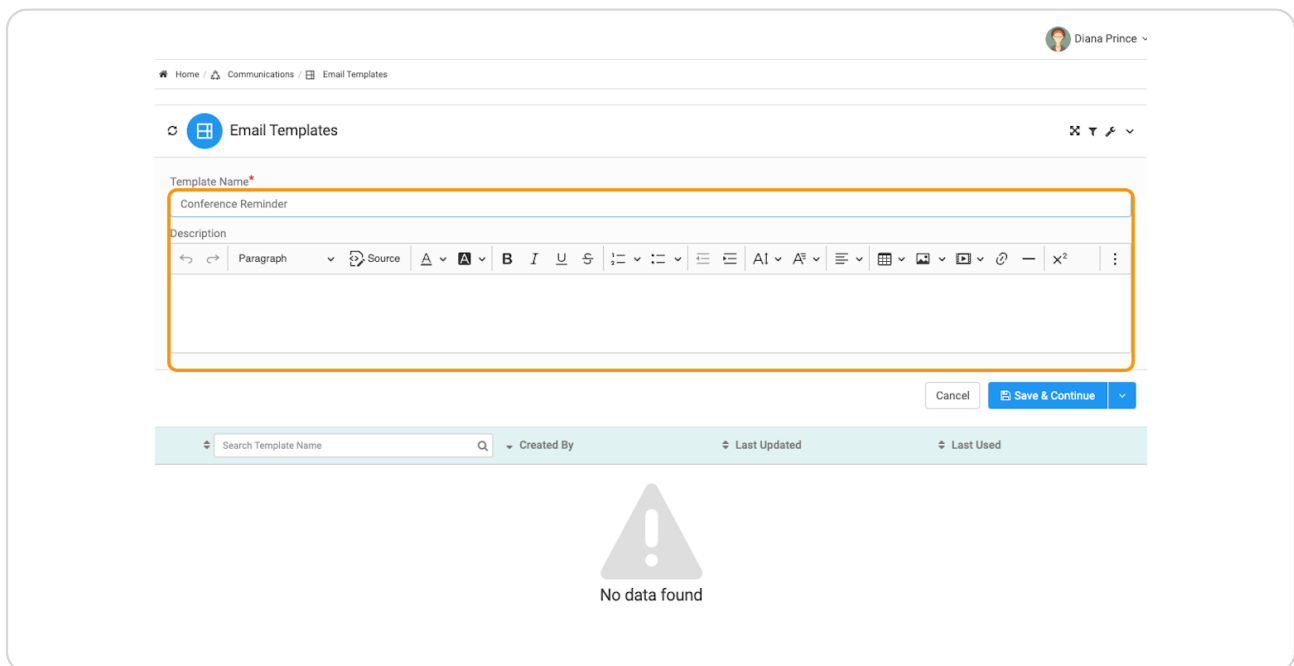
STEP 3

Click on Add a Template to create a new Template



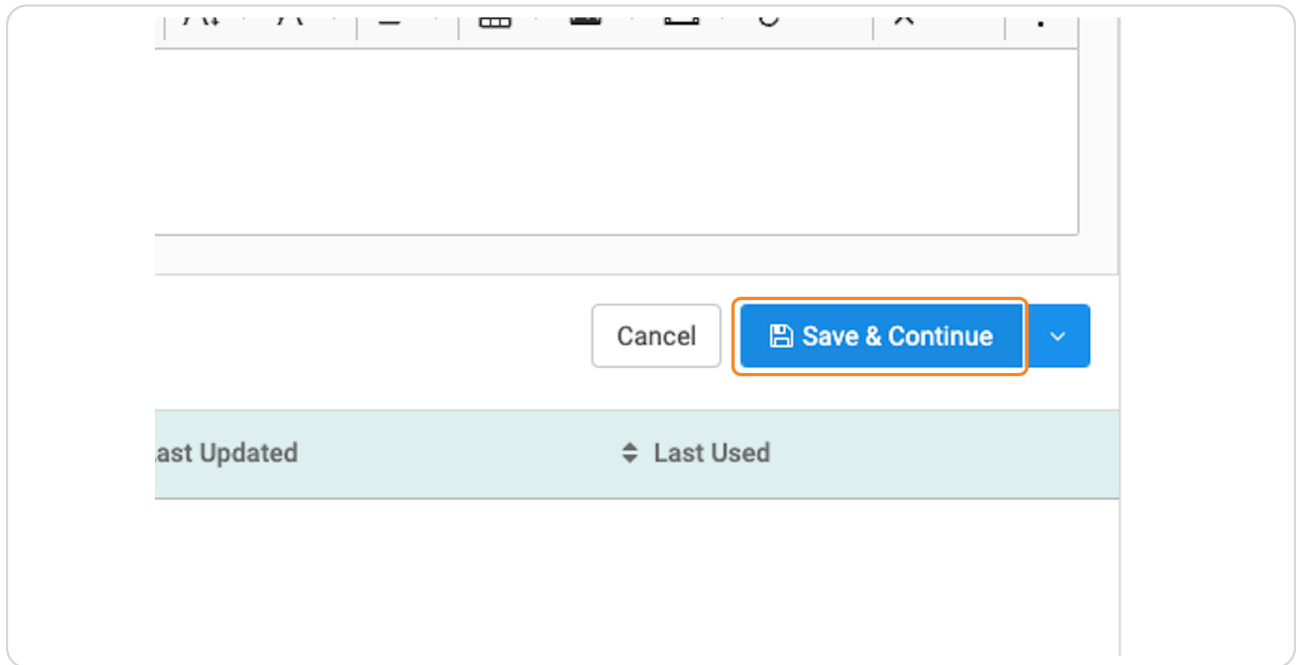
STEP 4

Type in Template Name and optional description



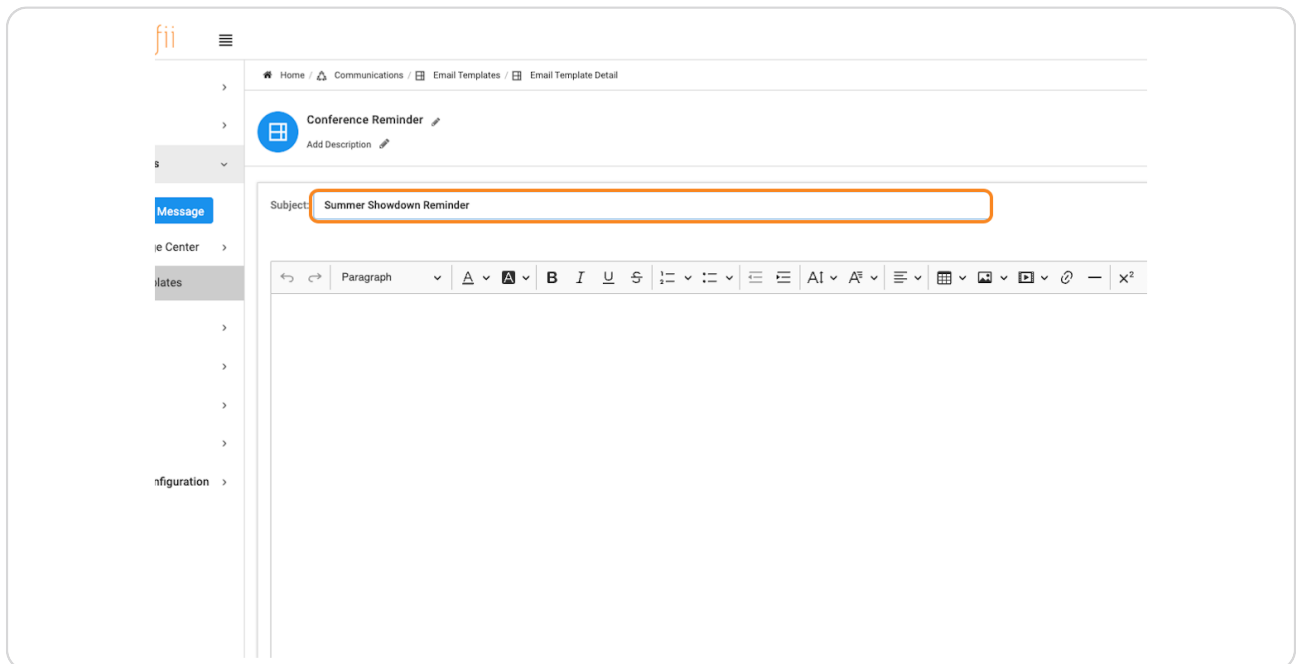
STEP 5

Click on Save & Continue



STEP 6

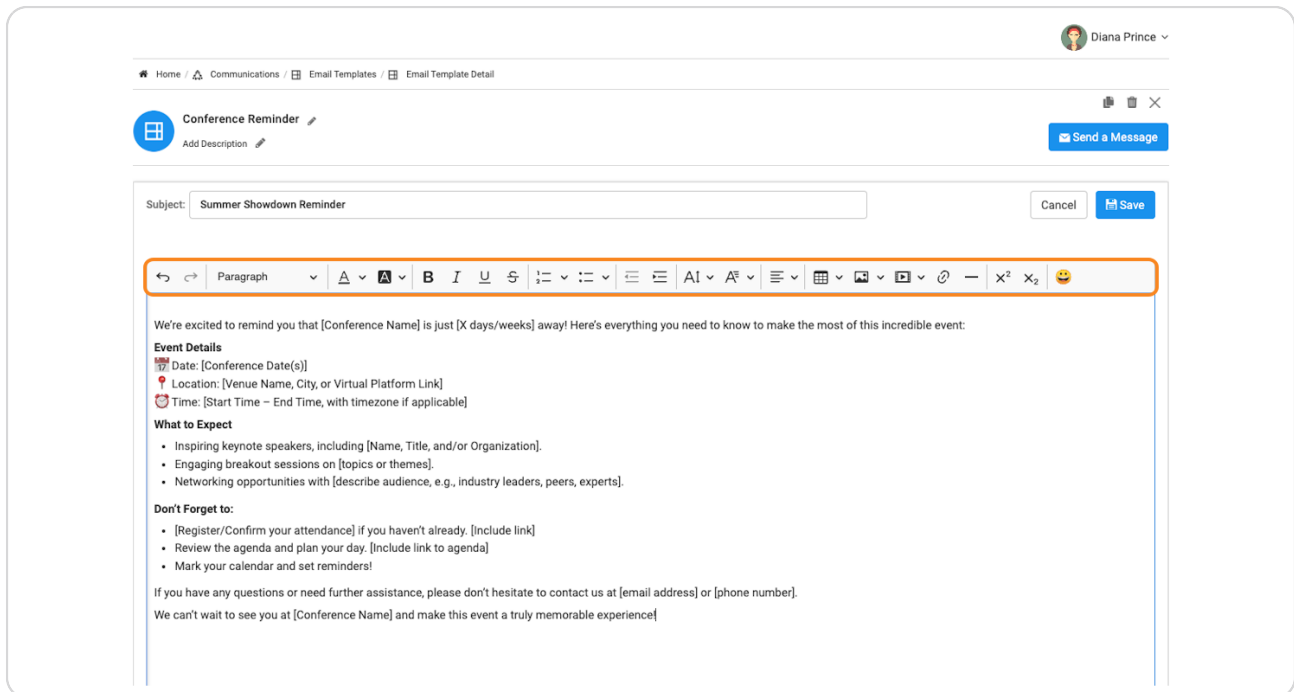
Type in Subject of Email Template



STEP 7

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.



The screenshot shows a web-based email editor interface. At the top right, the user's name 'Diana Prince' is displayed. The breadcrumb navigation shows 'Home / Communications / Email Templates / Email Template Detail'. The main title is 'Conference Reminder' with an 'Add Description' link. A 'Send a Message' button is visible. The subject line is 'Summer Showdown Reminder'. Below the subject line is a rich text editor toolbar with various icons for undo, redo, paragraph style, text color, background color, bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, insert link, insert image, insert video, insert audio, link, unlink, and emoji. The main content area contains the following text:

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

-  Date: [Conference Date(s)]
-  Location: [Venue Name, City, or Virtual Platform Link]
-  Time: [Start Time - End Time, with timezone if applicable]

What to Expect

- 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].

Don't Forget to:

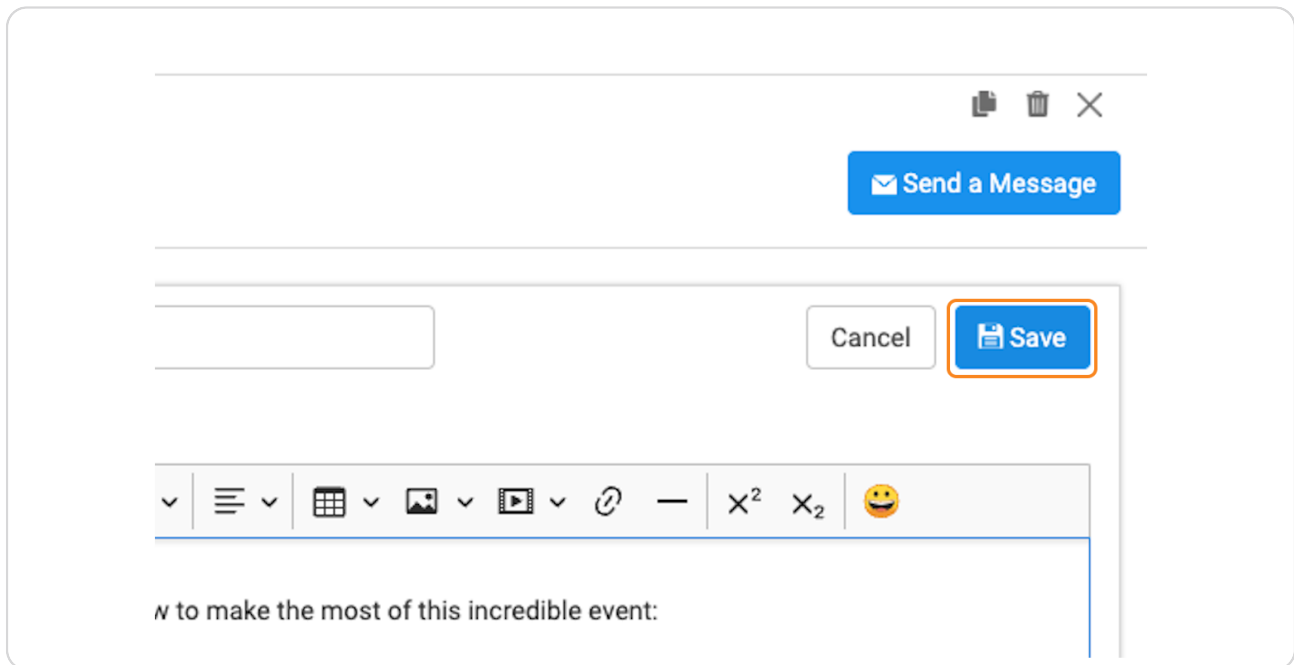
- [Register/Confirm your attendance] if you haven't already. [Include link]
- Review the agenda and plan your day. [Include link to agenda]
- Mark your calendar and set reminders!

If you have any questions or need further assistance, please don't hesitate to contact us at [email address] or [phone number].

We can't wait to see you at [Conference Name] and make this event a truly memorable experience!

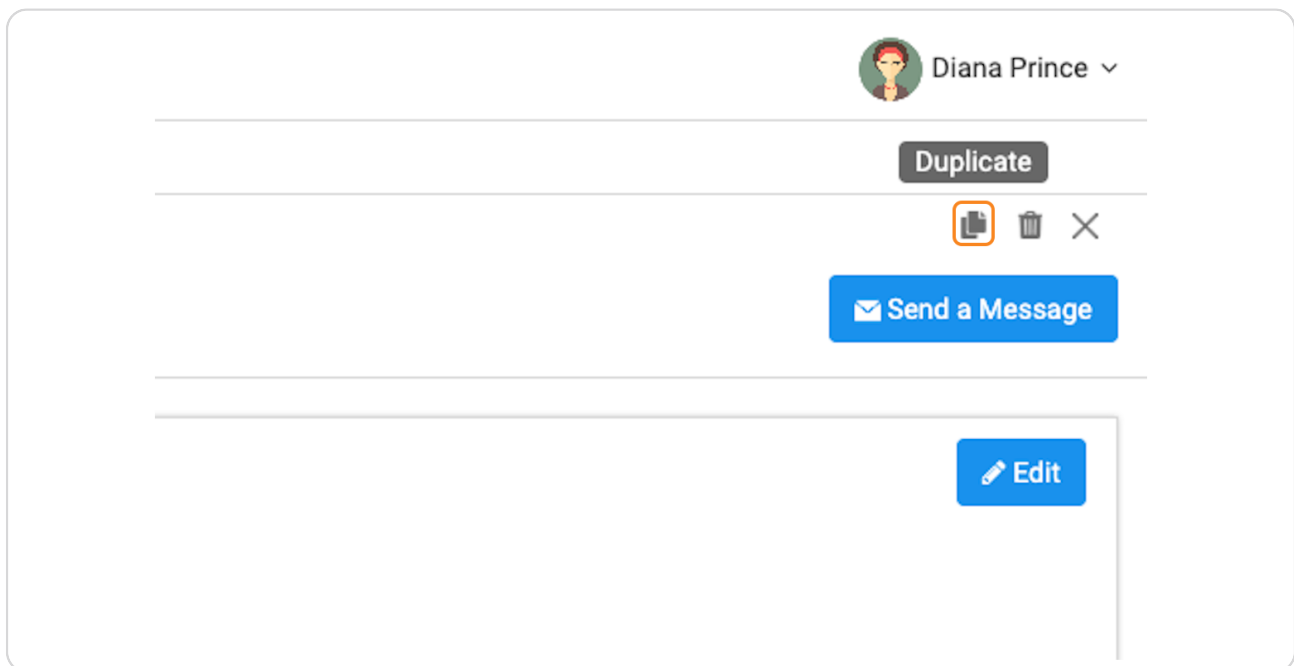
STEP 8

Click on Save



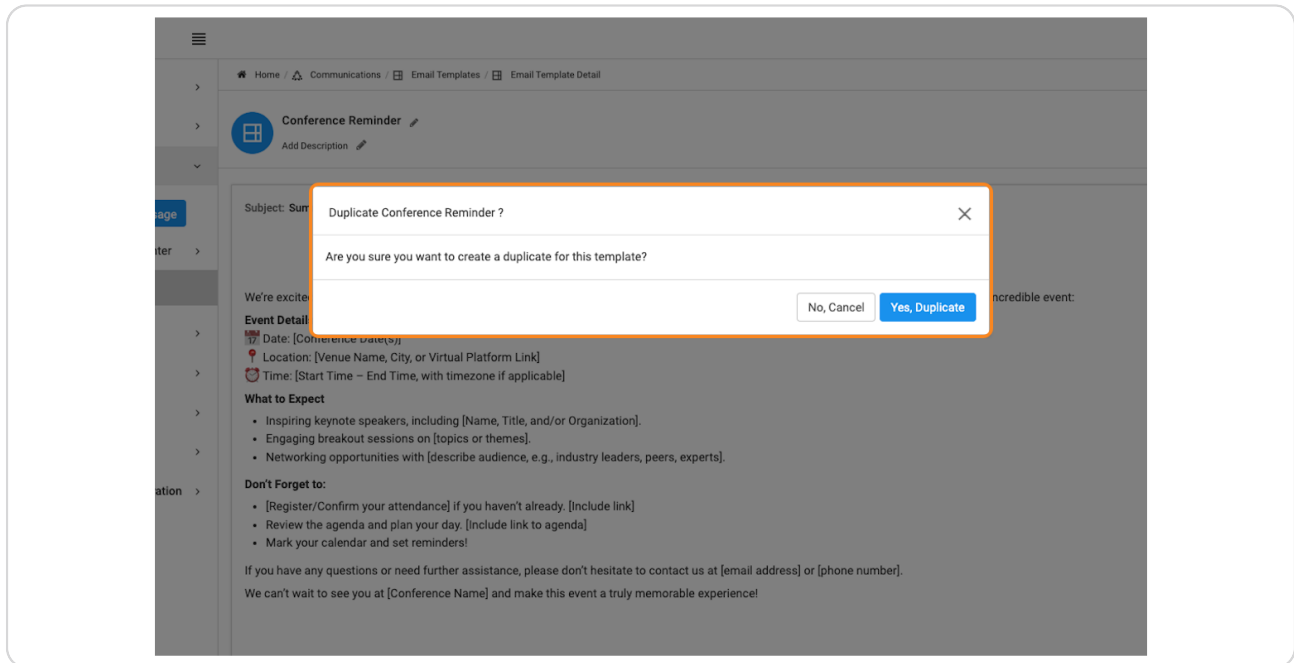
STEP 9

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



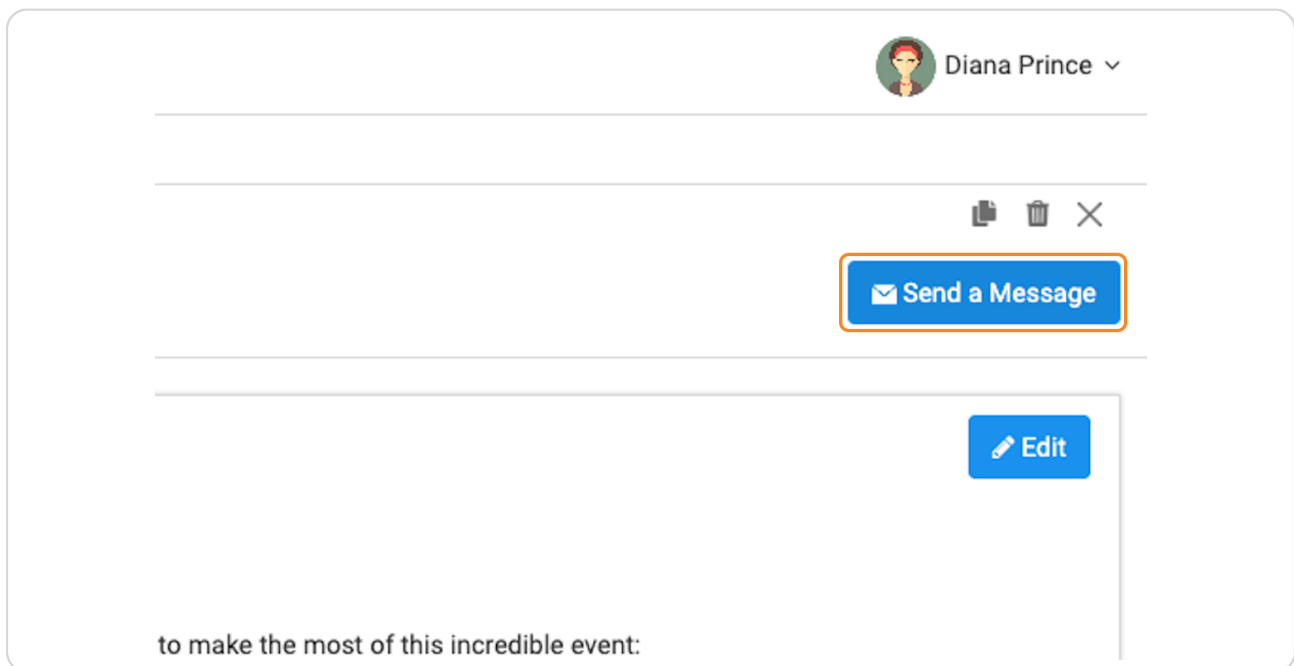
STEP 10

Click on Duplicate to copy an existing template.



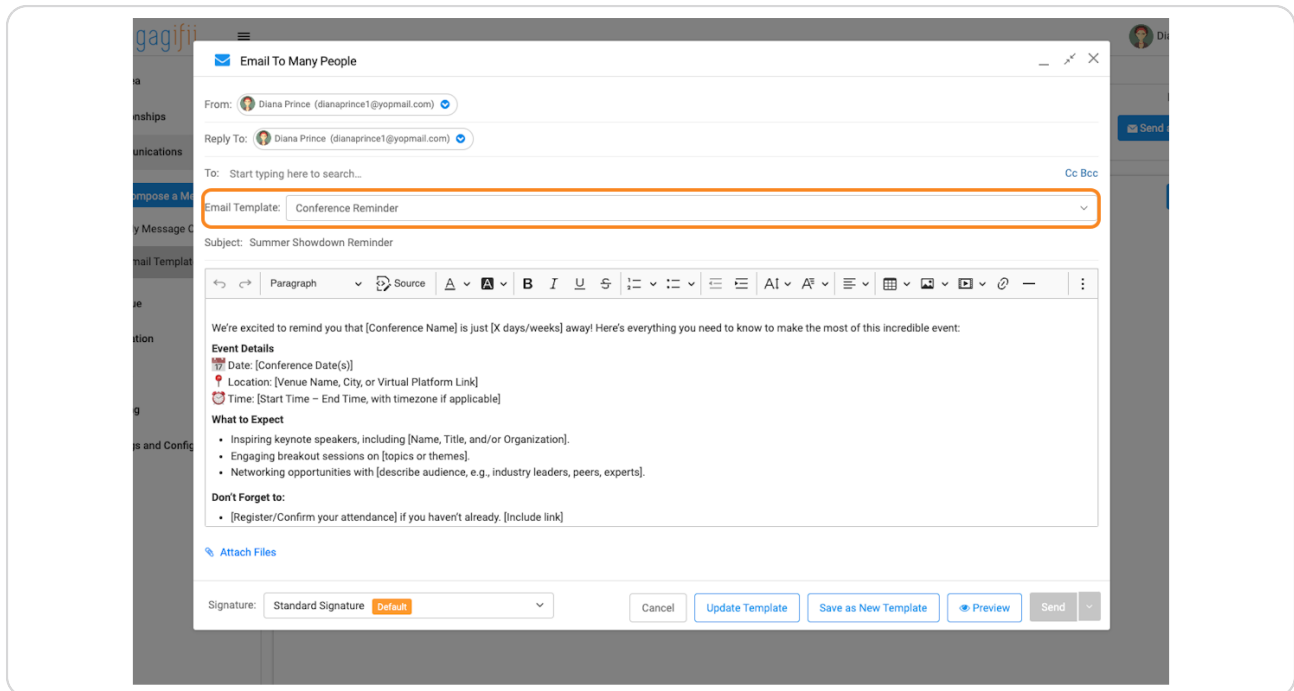
STEP 11

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



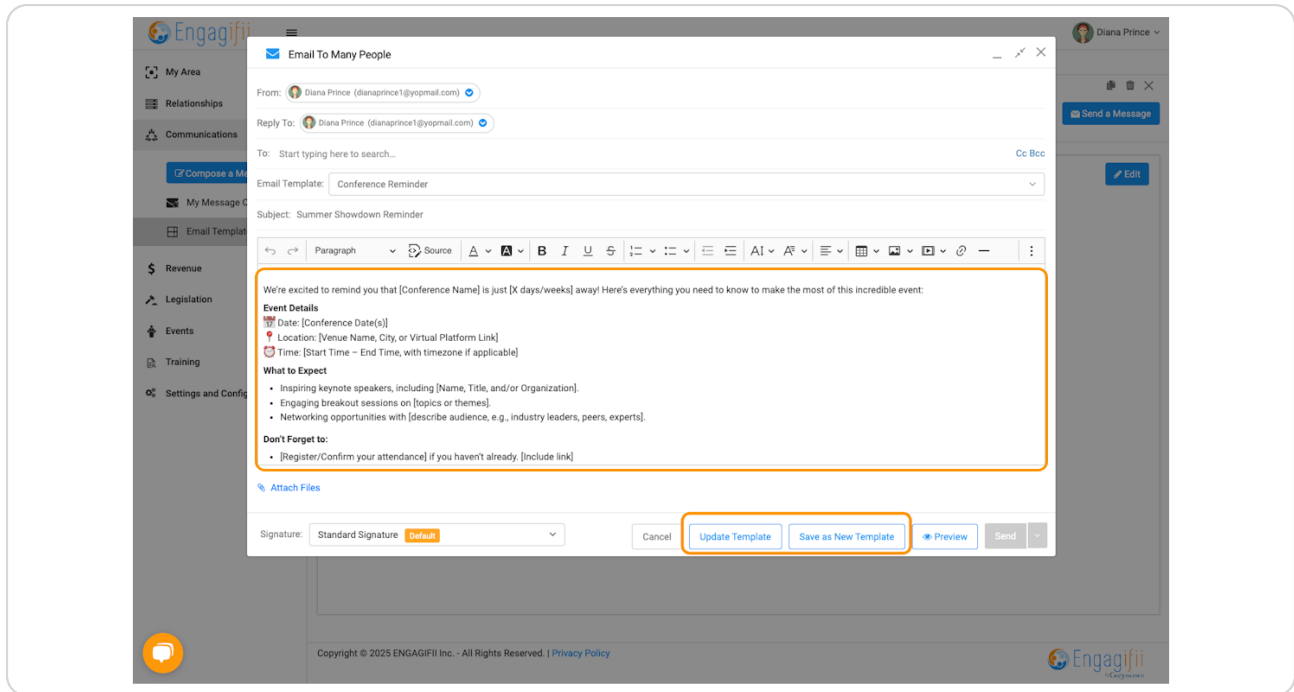
STEP 12

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



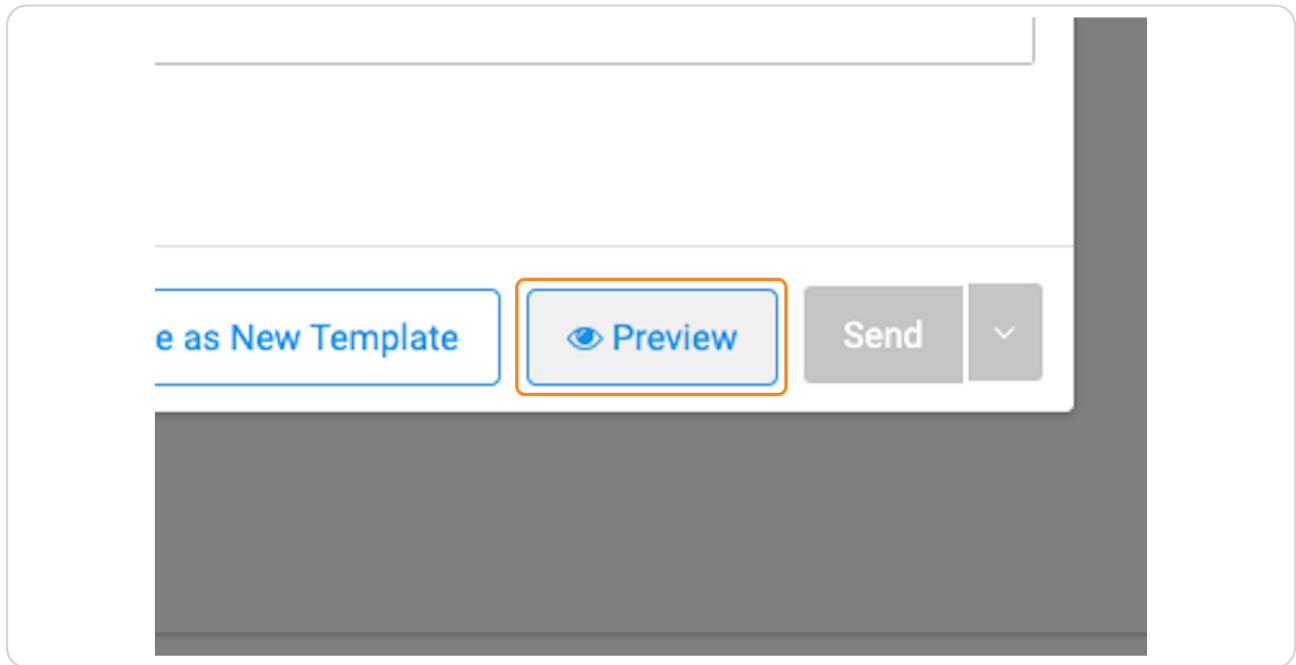
STEP 13

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



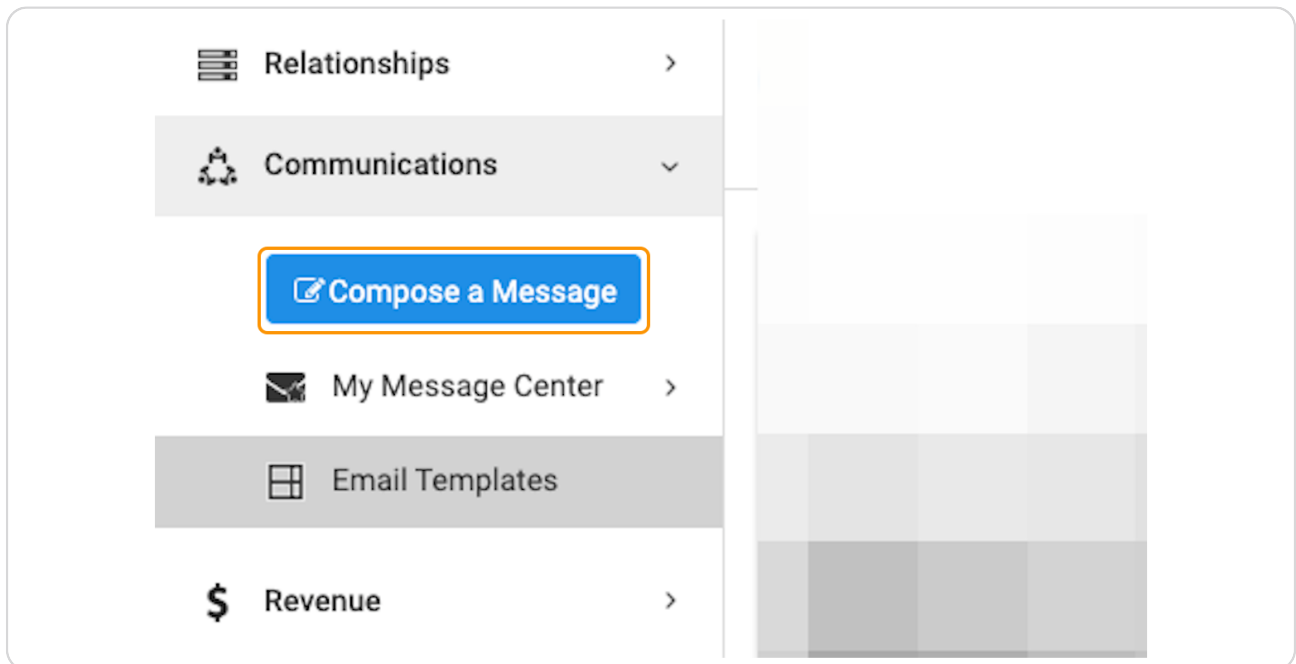
STEP 14

Click on Preview to view email before sending



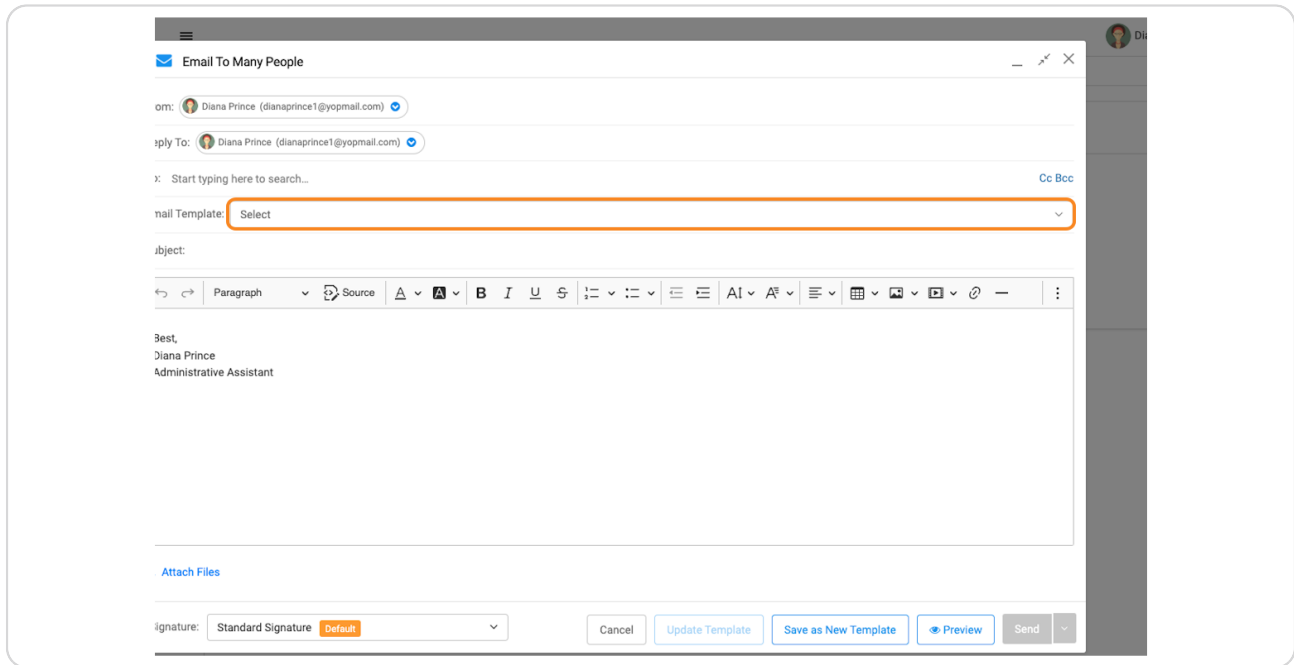
STEP 15

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



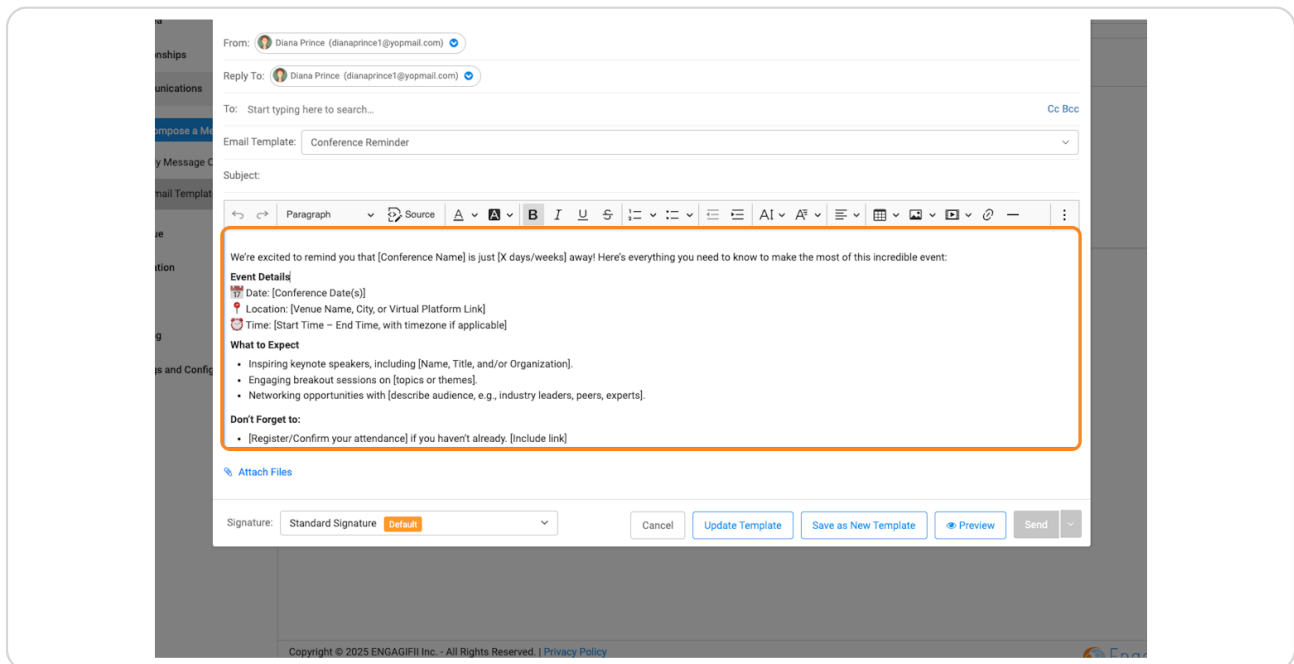
STEP 16

Click on Select to pick your email template



STEP 17

You can edit as you normally would.



STEP 18

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

The screenshot displays an email composition window. At the top, the 'From' field is set to 'Diana Prince (dianaprince1@yopmail.com)'. The 'Reply To' field is also 'Diana Prince (dianaprince1@yopmail.com)'. The 'To' field is empty with the placeholder 'Start typing here to search...'. The 'Email Template' dropdown is set to 'Conference Reminder'. The 'Subject' field is empty. Below the subject field is a rich text editor with a toolbar. The editor contains the following text:

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

- Date: [Conference Date(s)]
- Location: [Venue Name, City, or Virtual Platform Link]
- Time: [Start Time - End Time, with timezone if applicable]

What to Expect

- 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].

Don't Forget to:

- [Register/Confirm your attendance] if you haven't already. [Include link]

Below the editor, there is an 'Attach Files' link. At the bottom of the window, a signature dropdown menu is highlighted with an orange border. It shows 'Standard Signature' as the selected option and 'Default' as the current signature. To the right of the dropdown are buttons for 'Cancel', 'Update Template', 'Save as New Template', 'Preview', and 'Send'. The footer of the window contains the copyright notice 'Copyright © 2025 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy' and the Engagifii logo.

