

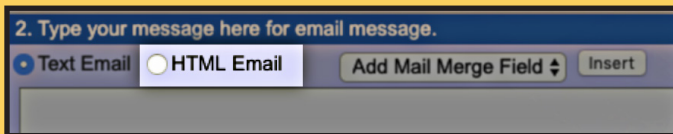
BrightArrow — Creating Email Templates

Text emails are fine but most of us are used to seeing nice looking visuals in our emails from different organizations. With HTML emails you can make your outgoing email look as visually pleasing as you'd like. Most of us don't have time to spend creating this visual look each and every time we send a message, that's where email templates come into play.

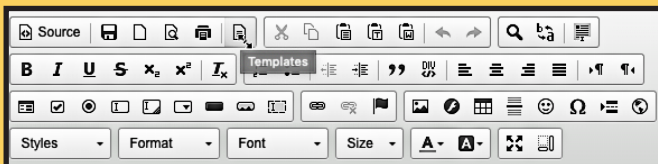
Where are email templates?

To get to email templates:

1. Make sure email is selected as a method of sending your message.
2. Change the email type from Text Email to HTML Email.

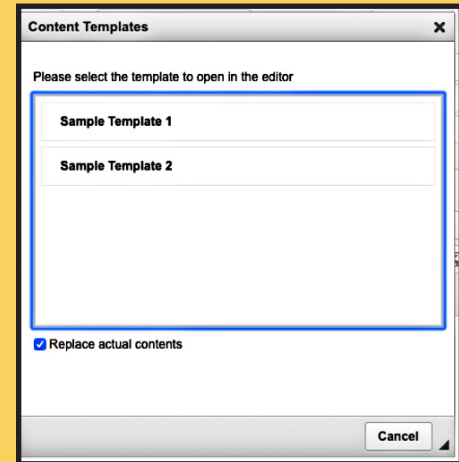


3. You'll now be in the HTML Email edit window. Just above the main message box you'll see many buttons to help you design your email. The first row (starts with the "Source" button) contains the templates button. It is the 6th one over and resembles a piece of paper with the corner folded over. When you hover over it it'll say "Templates."

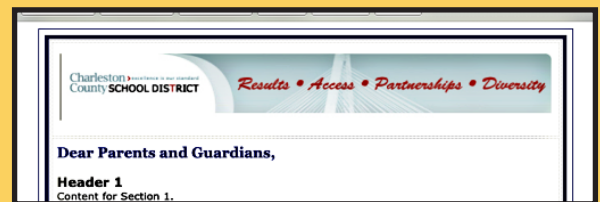


4. Clicking the templates button will show you the template window listing the templates available to you. If you don't have any templates created, you'll see two sample templates. This is to demonstrate that you may have more than one template.

(View image on next column.)



5. Select the template you wish to use from the list. This will load that template into the message window.



6. With the template loaded you can now enter your message with the design piece created for you already.

How do I create an email template?

Email templates exist on our servers and need to be installed by one of our technicians. To create your templates you will first design it and then send us the design so we can turn it into a template for you.

(Creating email template steps on next page.)

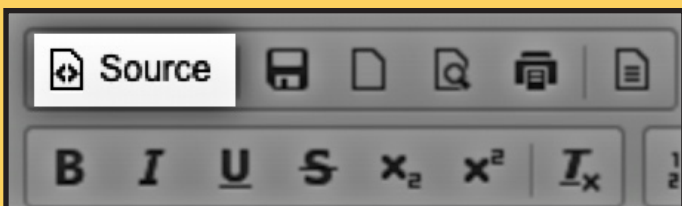
1. **Design your template.** Use the built-in tools to create the layout you wish to use. This may take a while, which is why turning it into a template will save so much time.

a. Many people use Sample Template 1 as a starting point. You can load this and then make changes to save you some time.

b. Consider who will use the template. If they'll be creating messages that reference a merge field, it might be beneficial to include that in the template design so they don't need to remember to add it. "Dear [[firstname]]" works in a template just as it would in a regular email.

2. **Send us your template design.** Once you have your template ready you'll need to send it to us so we can convert it into a template for regular use. To do that:

a. Click on the "Source" button. This will reveal the code.
NOTE: If you are familiar with HTML, you can also add your own code here as well.



b. Copy everything in the box. Don't be alarmed if you aren't familiar with HTML. The interface created the necessary code while you designed. This is called a WYSIWYG editor (What You See Is What You Get).

```
<div style="margin: 0px 0px 10px; padding: 0px; border: 0px black; width: 100%; color: black; line-height: normal; clear: both; font-family: Verdana,Arial,Helvetica,sans-serif; font-size: 10pt; font-weight: normal; background-color: transparent; border-image: none;">
<table align="center" style="margin: 0px auto; padding: 5px; border: 1px solid rgb(5, 5, 120); width: 656px; height: 848px; background-color: rgb(255, 255, 255); border-image: none;">
<tbody>
<tr>
```

c. Paste the copied code into a text file. Save this file as [your template name].txt where [your template name] is replaced with what you want the users to click on to pull this template up. If you were creating Sample Template 1 you'd name your file Sample_Template_1.txt

d. Start a ticket to have a BrightArrow technician create that template for you. In order to request we turn your file into a template, email: GetTechSupport@brightarrow.com

By default, we'll create the template for everyone. If you have users grouped in BrightArrow and only wish certain groups to see the template, please let us know when you email your request.



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