How do I create and manage custom email templates?

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Custom Email Templates allow you to create customized messages as templates. These pre-designed message templates can be applied to outgoing emails or notifications.

Email Templates

1. Click **Settings** or the **gear icon**, on the left menu.
2. Click on the **Communication** tab.
3. Click on one of the links in the **Email Templates** section.
4. This will display a list of existing email templates with the following information:
    - **Name** - The name of the email template.
    - **Subject** - The subject of the email template.
    - **System tag** - Some email templates will display a System tag. This shows the email template comes from the system itself and not from your account.
    - **Actions button** - A list of actions you can take.
        - **Make Default** - This sets the email template as your personal default email template when creating an email.
        - **Preview** - Previews the email template to see its content.
        - **Edit** - Lets you modify the email template.
        - **Usage** - This displays were the template is used.
        - **Copy** - Creates a duplicate of the email template.
        - **Delete** - Deletes the non-system email template.
        - **Restore** - Restores the edited system email template back to it’s default.

Creating an Email Template

1. From the Email Templates list, click on the **Add New Template** button.

2. You will be asked to fill in the following fields:
    - **Name** - The name of the email template.
    - **Subject** - The subject of the email template.
    - **Preview Text** - A text snippet that may be displayed in the recipient's inbox after the subject line.
    - **Message Template Code** - The code of the email template (optional).
    - **Insert Mail Merge Fields** - This allows you to enter merge fields into the email template.
    - **HTML** - The content of the email.
    - **Text** - The text only content of the email. When plain text is populated, email clients with HTML disabled will still display the text version.
    - **Generate text version** - This allows you to generate a text only version of the HTML content of the email, overwriting the current Text version of the email.
3. Click **Save** when done.

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