

HOW TO: EMAIL TEMPLATE CREATION / EDIT / SEND

created: 6/5/2019

- 1) Login to the SAJAC MEMBERS AREA <https://www.sajac.com/sajac/sajac-membership/login.php> with the username and password provided to you.

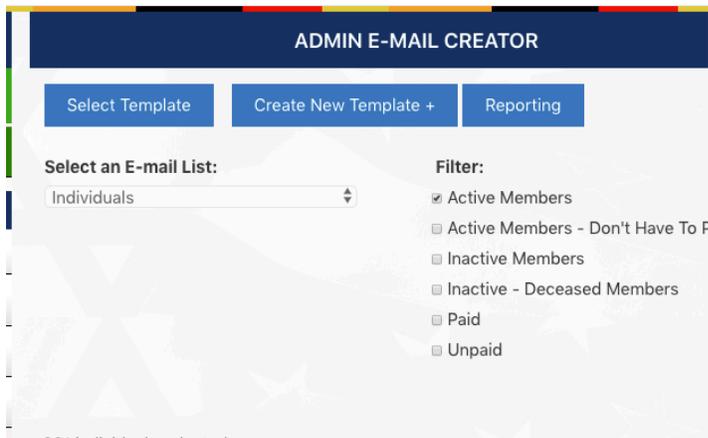
SENDING AN EMAIL TO AN EXISTING LIST THAT IS READY TO GO:

(see EMAIL LIST CREATION AND MAINTENANCE - SAJAC2.pdf doc on how to create or edit a list before sending an email)

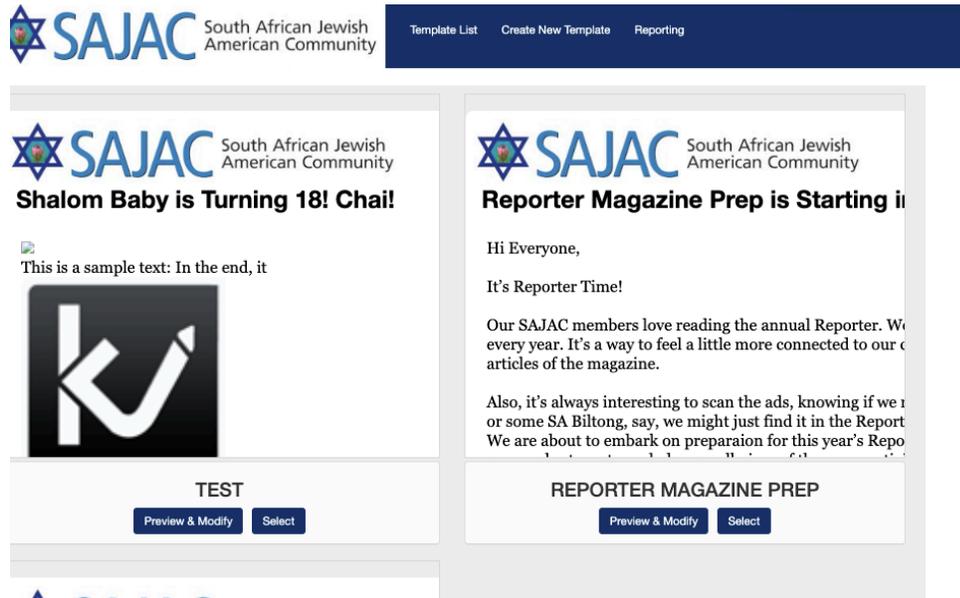
- 2) click on **EMAIL CAMPAIGNS** under **MARKETING** on the left.
- 3) Either Select the **SELECT TEMPLATE** button at to the top of the screen to select an existing template or **CREATE NEW TEMPLATE**

SELECTING AN EXISTING TEMPLATE

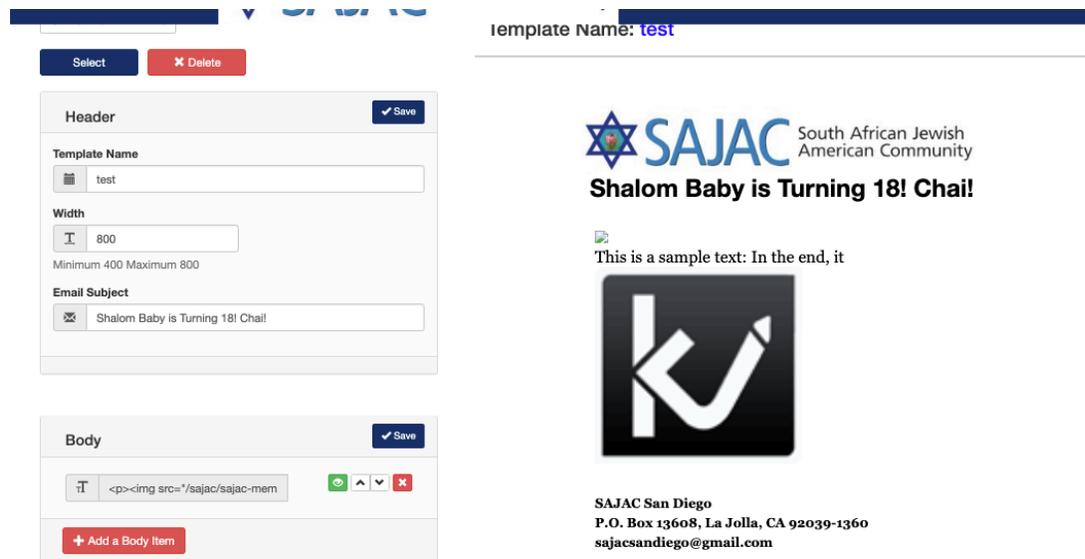
- 4) Let us first start with **SELECTING AN EXISTING TEMPLATE** to modify for this email.
- 5) Select the **SELECT TEMPLATE** button at the top of the screen



6) Select **PREVIEW & MODIFY** below a template to edit it Or create a new one.



7) On the left side you should name your template so you can find it easily in the future under **TEMPLATE NAME:**



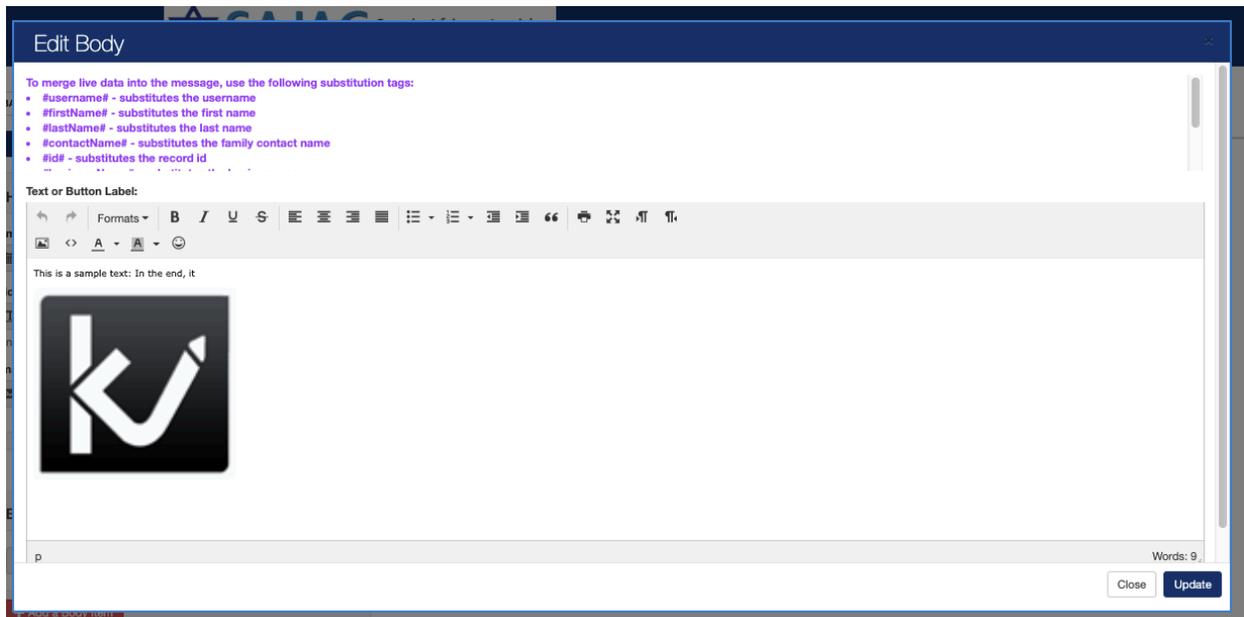
8) Leave the width set at 800 unless you want to make the width of the email smaller.

9) Enter an **EMAIL SUBJECT**

10) **In order to see your changes to the template preview on the right, be sure to select the SAVE button on each of the boxes. Example:** You edited the Email Subject, now select the SAVE button top right on the same grey box that it is in.

11) on LEFT select **click on an existing body item** on the left to edit it. If you want to ADD a new Body Item you can click that as well.

It is good to add a new or extra body item to an email if your email is very long. The main text box can only hold so much text before it has to be split up into two or three body items. Most short emails will be fine, but if you have a really long email it is best to split it into two or three body items depending on how long the email is. It is a limitation in the database.



12) Once the Body Item of text is open, you can add text, images, change the color of the text and so forth based on the limitations of the editor.

13) You will notice PURPLE text items at the top of this screen. These are called variables and can be inserted into your emails to pull that specific data onto the email. Example: If I wanted to add Dear Joe (or have Dear and the first name of the person I am emailing to) I would enter Dear **#firstName#** this would then insert the first name of each person I am emailing to - to further personalize the email. You can scroll down in the window to see what each of these variables are but here is a reference for you:

To merge live data into the message, use the following substitution tags:

#username# - substitutes the username

#firstName# - substitutes the first name

#lastName# - substitutes the last name

#contactName# - substitutes the family contact name

#id# - substitutes the record id

#businessName# - substitutes the business name

#familyName# - substitutes the family name

#greeting# - substitutes the first and last name

#birthDate# - substitutes the date of birth

#accountType# - substitutes the type of account (individual, family, or business)

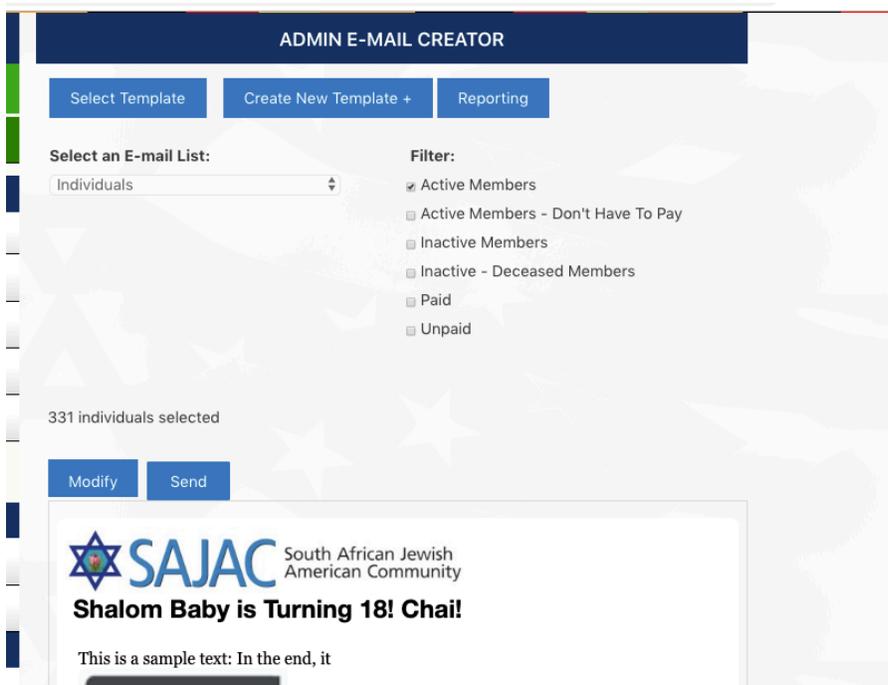
The screenshot shows a web-based interface for editing an email template. At the top left is a button labeled '< BACK TO TEMPLATES'. Below it are two buttons: a dark blue 'Select' button and a red 'Delete' button with a white 'x' icon. The main editing area is a light gray box with a 'Header' title and a 'Save' button with a checkmark icon. Inside the header box, there are three sections: 'Template Name' with a text input field containing 'test' and a calendar icon; 'Width' with a text input field containing '800' and a ruler icon, with a note below it stating 'Minimum 400 Maximum 800'; and 'Email Subject' with a text input field.

14) You can then type out your message as you like.

15) Once completed, you need to select the **UPDATE** button on the far right bottom of the window

16) You will now see the updated template in your window.

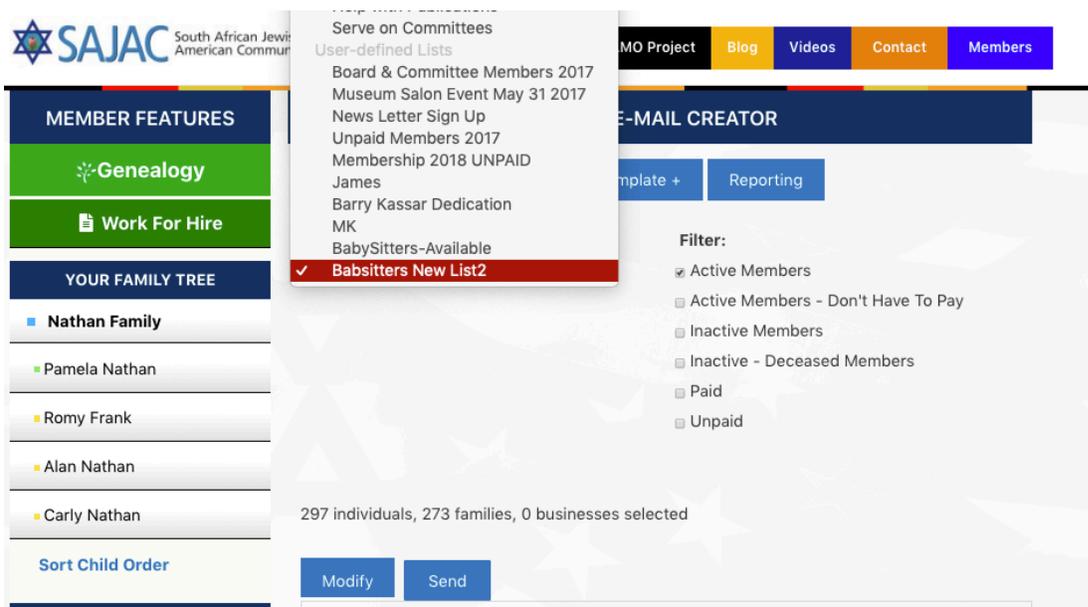
17) If everything looks good, select the **SELECT** button at the top left of the left side menus. I always select the SAVE buttons on each box just to be sure I have saved the info I entered.



18) **WAIT! YOU'RE NOT DONE YET...**you still need to **select the correct list!**

19) You will now see the template you just saved in the window below. This window has now defaulted and selected the main list for this section which will always be **INDIVIDUALS** - you need to change this to your list.

20) You **MUST SELECT THE DROPDOWN** and **SELECT THE LIST** that you would like this template to go to.



21) In this example, we are going to select the **Babysitters New List2**
You will notice it now shows 297 Individuals and 273 families that are active.

If this is **CORRECT**, you are good to go and you can select **SEND**. Do not close the window until the system is done sending emails. This cannot be sent in the background so let it run until all emails are sent then you will see a success message.

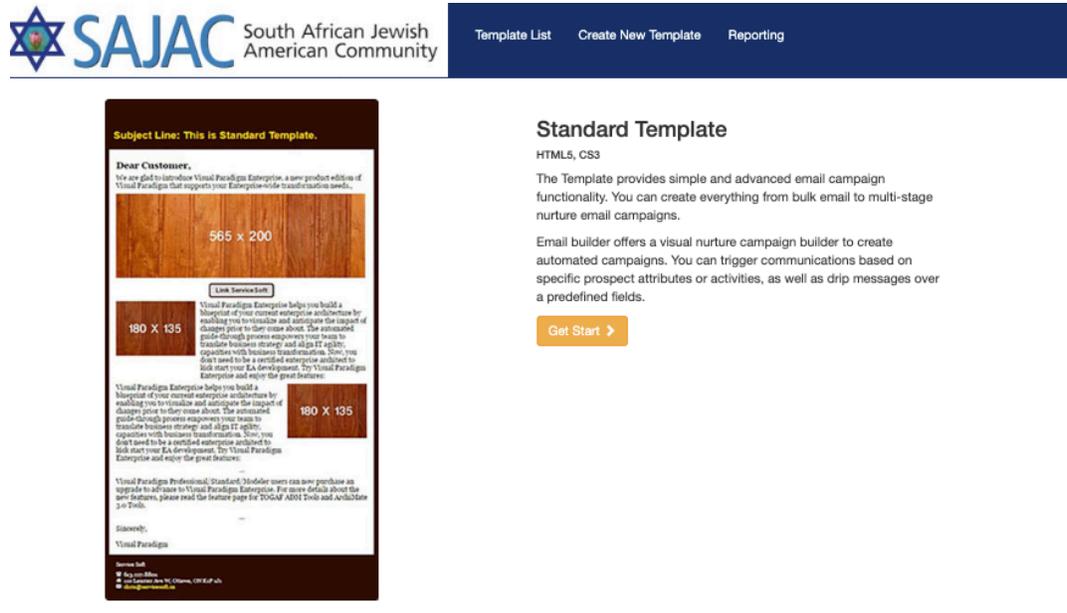
If you want to remove some users from the selected list, just scroll down the screen and deselect their names from the list before hitting send.

If this is **NOT CORRECT**, and you only need the individuals but not the families on this list, you will have to go to list maintenance and edit this list so that is correct.
(see EMAIL LIST CREATION AND MAINTENANCE - SAJAC2.pdf doc on how to create or edit a list before sending an email)

CREATING A NEW TEMPLATE:

22) Click on **EMAIL CAMPAIGNS** under **MARKETING** on the left side menu.

23) Select **CREATE NEW TEMPLATE** you will see this page:



The screenshot shows the SAJAC website interface. At the top left is the SAJAC logo and name. A navigation bar contains 'Template List', 'Create New Template', and 'Reporting'. The main content area is titled 'Standard Template' and includes the following text:

Subject Line: This is Standard Template.

Dear Customer,
We are glad to introduce Visual Paradigm Enterprise, a new product edition of Visual Paradigm that supports your Enterprise-wide transformation needs.

565 x 200

[Link Service Soft](#)

190 X 135

Visual Paradigm Enterprise helps you build a blueprint of your current enterprise architecture by enabling you to visualize and automate the impact of change prior to they come about. The automated guide through process empowers your team to translate business strategy and align IT applications with business transformation. Now, you don't need to be a certified enterprise architect to kick start your EA development. Try Visual Paradigm Enterprise and enjoy the great features:

180 X 135

Visual Paradigm Enterprise helps you build a blueprint of your current enterprise architecture by enabling you to visualize and anticipate the impact of change prior to they come about. The automated guide through process empowers your team to translate business strategy and align IT applications with business transformation. Now, you don't need to be a certified enterprise architect to kick start your EA development. Try Visual Paradigm Enterprise and enjoy the great features:

Visual Paradigm Professional/Standard/Modeler users can now purchase an upgrade to advance to Visual Paradigm Enterprise. For more details about the new features, please read the feature paper for TOC/AD/ADT Tools and Activities 3 in Tools.

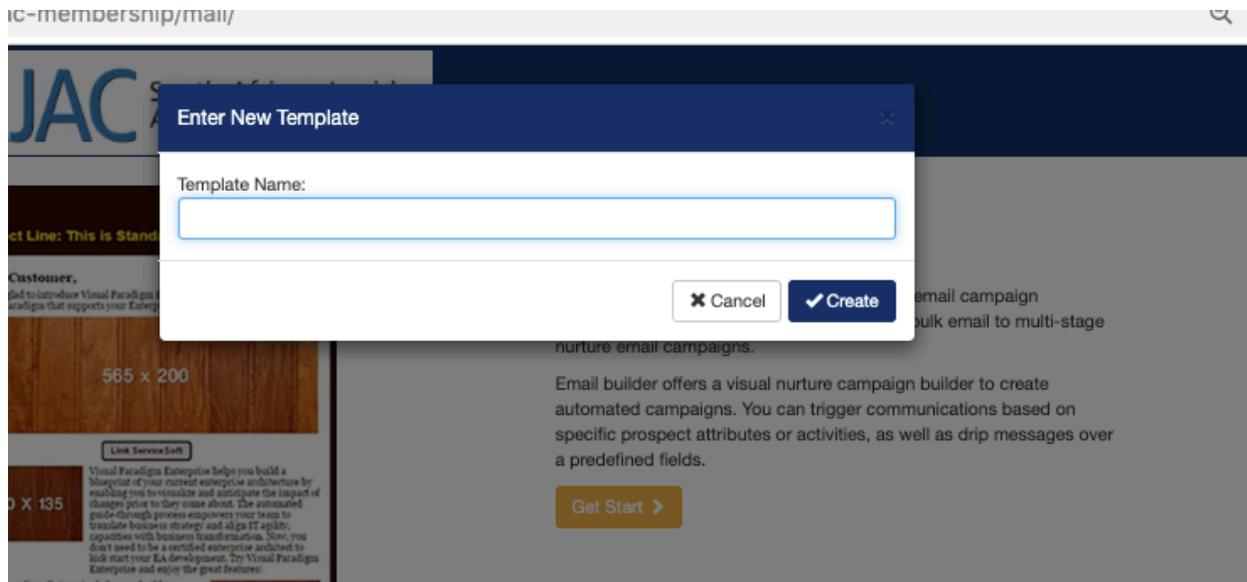
Sincerely,
Visual Paradigm

Service Soft
800-354-9100
10000 Lakeshore Blvd, Chicago, IL 60643, USA
www.visual-paradigm.com

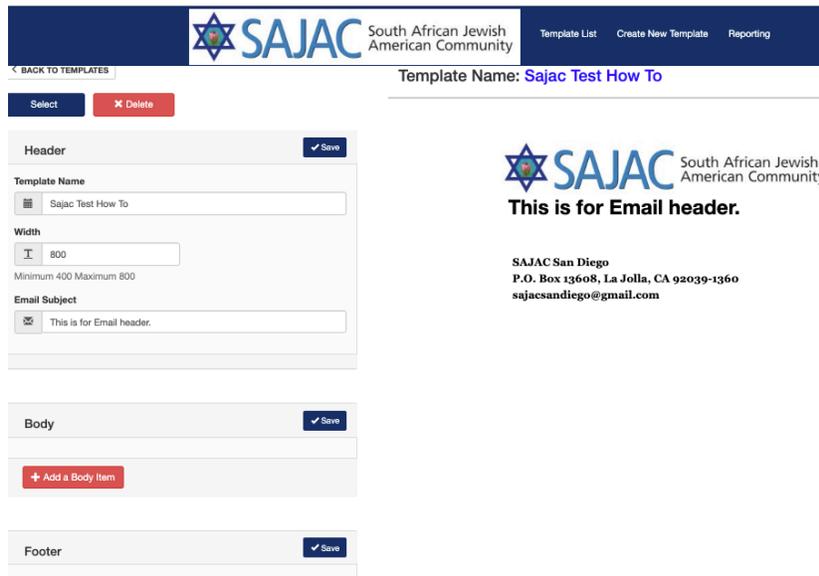
[Get Start >](#)

24) Click **GET STARTED**

25) Name the **Template** and select **CREATE**



- 26) Leave the width set at 800 unless you want to make the width of the email smaller.
 27) Enter an **EMAIL SUBJECT** select SAVE top right on this grey box

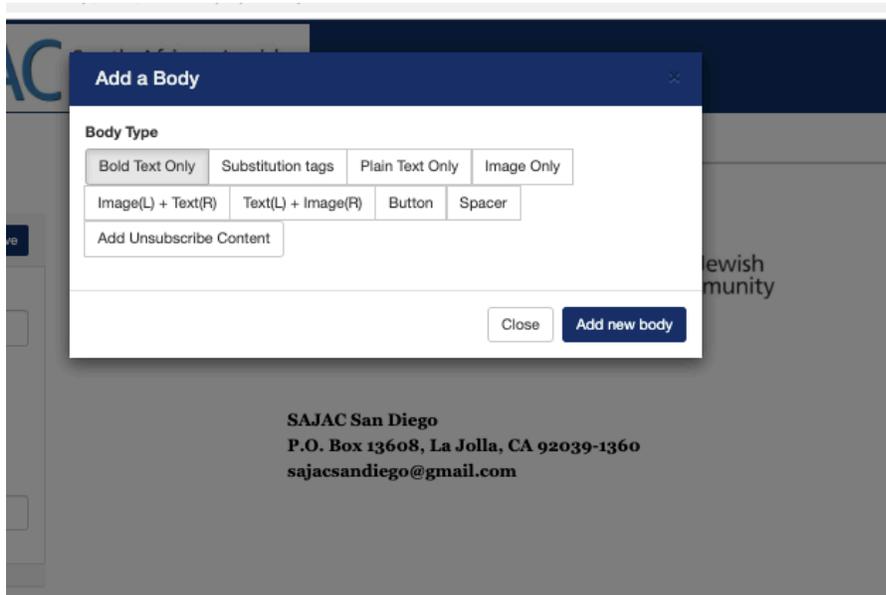


- 28) **In order to see your changes to the template preview on the right, be sure to select the SAVE button on each of the boxes. Example:** You edited the Email Subject, now select the SAVE button top right on the same grey box that it is in.
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30) Select **ADD BODY ITEM** since none are available.

31) You will need to select what type of body item. In this case it is **PLAIN TEXT ONLY**



32) Select ADD NEW BODY button

 South African Jewish American Community
This is for Email header.
This is a sample text: In the end, it
SAJAC San Diego
P.O. Box 13608, La Jolla, CA 92039-1360
sajacsandiego@gmail.com

33) You will now see that the template on the right has text called *“This is sample text...”* and on the left under the **BODY** item you will now see this same text. Click on the body item on the left of the screen and a window will open and allow you to edit the text.

34) Once the Body Item of text is open, you can add text, images, change the color of the text and so forth based on the limitations of the editor.

35) You will notice PURPLE text items at the top of this screen. These are called variables and can be inserted into your emails to pull that specific data onto the email. Example: If I wanted to add Dear Joe (or have Dear and the first name of the person I am emailing to) I would enter Dear **#firstName#** this would then insert the first name of each person I am emailing to - to further personalize the email. You can scroll down in the window to see what each of these variables are but here is a reference for you:

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36) Type out your message.

37) Once completed, you need to select the **UPDATE** button on the far right bottom of the window

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TEMPLATE NOTES:

If you have multiple body items on your template and you want to **MOVE** the text up use the UP

 [arrow icon to the right of the icon to move the field up one level

EDIT THE text by clicking on the **EYEBALL** to the right of This is sample text

DELETE: Selecting the **RED** box will delete the body item.

