



## Sage E-marketing for Sage CRM

### Quick Start Guide to:

### Local Templates

Local templates are templates you have imported into Sage E-marketing for Sage CRM or copied from the Sage E-marketing for Sage CRM Global Templates library. To view Local Templates in Sage E-marketing for Sage CRM's Template Manager, follow these steps:

1. From the Sage E-marketing for Sage CRM Template Manager screen, click on the Local Templates tab.

The screenshot displays the Sage E-marketing for Sage CRM Template Manager interface. At the top, there are five tabs: "Global Templates", "Local Templates" (which is selected and highlighted in yellow), "Import Template", "Publish/Distribute", and "Landing Pages". Below the tabs, the "Recently Edited Templates:" section shows a list with "Test 1". The "Select a Local Template:" section includes a checkbox for "Show Template prefix" and a "Refresh" button. A list of templates is shown below, with "SurveyLand Test 6" highlighted in blue. The list includes: "cfg\_ms\_bales\_wrong", "cfg\_ms\_bales", "DCMaryland", "EMP\_justlink", "PlainText\_Test 2", "Sample 1", "Sample" (in red), "SurveyBk Sample 1", "SurveyLand Test 6" (in blue), "Test 1", "Test 3", "Test 4", and "Test 5". To the right of the list are six buttons: "Preview", "Edit", "Make Read-only", "Copy", "Rename", and "Delete". At the bottom, there is a "Show:" section with four radio buttons: "All" (selected), "Read-only" (in red), "Advanced" (in green), and "Basic" (in blue).

2. Listed in this window are all of your Sage E-marketing for Sage CRM Local Templates. Read-only templates are in red, basic templates are in blue and advanced templates (usually

imported templates) are in green. You can filter them using the radio buttons at the bottom of the screen. From this screen, you can perform the following functions:

- Click the Refresh button to show the most up-to-date list at any point.
- Highlight a template and click the Preview button to view that template.
- Highlight a template and click Edit to edit the template. **Note:** if you highlight one of the templates in the “Recently Edited Templates” window, this button will say Resume Edit.
- Highlight a template and click Make Read-Only to safeguard a template from further changes.

- Click Copy, Rename or Delete to perform any of those basic template functions as well.  
**Note:** when you Copy or Rename a template, you will be prompted for a new name.  
Template names cannot contain special characters.