

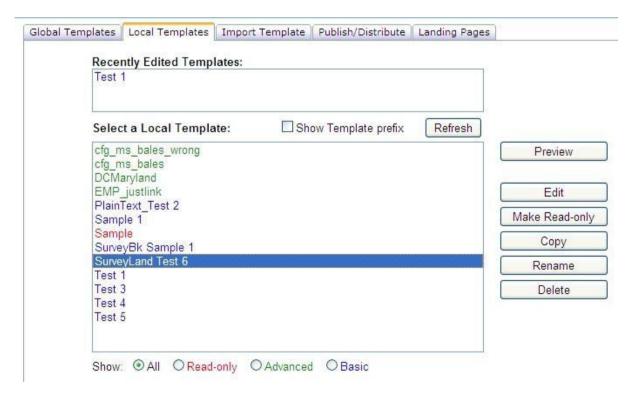
## Sage E-marketing for Sage CRM

## **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.



2. Listed in this window are all of your Sage E-marketing for Sage CRM Local Templates. Readonly 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.