



Quick Start Guide to:

Publishing and Distributing

The Publish/Distribute tab allows you to send your Sage E-marketing templates to other Sage E-marketing users, both within your account (Publish) and from another account (Distribute). To Publish or Distribute templates in Sage E-marketing's Template Manager, please follow these steps:

1. From the Sage E-marketing Template Manager screen, click on the Publish/Distribute tab.

The screenshot shows the Sage E-marketing Template Manager interface. At the top, there are five tabs: 'Global Templates', 'Local Templates', 'Import Template', 'Publish/Distribute' (which is highlighted), and 'Landing Pages'. Below the tabs, there is a section titled 'Select a template:' with a checkbox for 'Show Template Prefix' and a 'Refresh' button. A list of templates is displayed: 'Sample' (red), 'SurveyBk Test x' (blue), and 'Test Advanced' (green). To the right of the list, there are three buttons: 'Preview', 'Publish', and 'Distribute'. Below the list, there are radio buttons for 'Show: All' (selected), 'Advanced', and 'Basic'.

2. Listed in this window are all of your Sage E-marketing 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 Publish to send the template to another user in your Sage E-marketing account. You will see the screen below when you click this button. Then select the user(s) to whom you wish to publish the template and add to the Desired Recipients. Then click Ne

Global Templates Local Templates Import Template Publish/Distribute Landing Pages

Publish Template

Template to publish: **Sample** Step 1 of 3

1 Choose Recipients

Select users from your account

jess2

>>

Desired Recipients

jess2

Remove

<< Back Next >>

Publish Template

Template to publish: **Sample**

Step 1 of 3

2 Recipient Breakdown

Invalid users

Valid recipients

jess2

<< Back

Next >>

On Step 3, you'll want to confirm the correct template and recipients. Then click Publish.
(Publish as read-only means templates cannot be changed/edited by recipient)

Publish Template

Template to publish: **Sample**

Step 3 of 3

3 Publication type

Recipients: 1

Publish as read-only ** Templates cannot be changed by recipient*

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Publish

- Highlight a template and click Distribute to send the template to another user in your Sage E-marketing account. (**Note:** to Distribute templates, you should first set up your distribution list in the "Your User Profile" section of Home.) You will see the screen below when you click this button. Select the account/user combination(s) to whom you wish to distribute the template and add them to the desired recipients. You will be asked to confirm the choice through the next steps and when you say OK, you will receive a confirmation screen.

Distribute Template

Template to distribute: **Sample**

Step 1 of 3

1 Choose Recipients

Select users from your profiles' distribution list

>>

or upload a distribution list (CSV file)

>>

or manually enter a recipient

Account:

User:

Desired Recipients