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Online Engagement

How to: Create and use email templates with Drag & Drop

(4 min read)

Templates make it easier to create Targeted Emails with the Drag & Drop editor using pre-formatted designs. They can be used to ensure **consistent styling and branding** across your organization by allowing you to lock rows or content areas to prevent accidentally changing important sections like headers and footers. If you are using a multi-committee setup, you can also share templates between committees - making it easier for your affiliates to follow your style guidelines and best practices.

[Read more about creating Targeted Email with the Drag & Drop editor](#)



Featured Article Headline

This is a sentence or two introducing the lead story. This should be your top story, the biggest piece of news in your newsletter

[Read more](#)



Edit this section of copy to tell supporters how their action will help ignite change. Use stories, quotes, data, and other inspiring content to capture their attention and get them to act.

[Button](#)

If you are using the Classic Editor in Targeted Email, you can instead use Themes and Reusables to create pre-formatted content to include in your messages.

[Watch more about using themes and reusable](#)

Using templates to create an email

When you first open the Drag & Drop editor from the Compose Messages step in Targeted Email, you will be asked if you want to begin with a template. Recently updated templates will appear at the top.

Select a Template

Search for a template All Types ▾

Recent ←

Climate Blast
Shared by: Data Doing Good

All

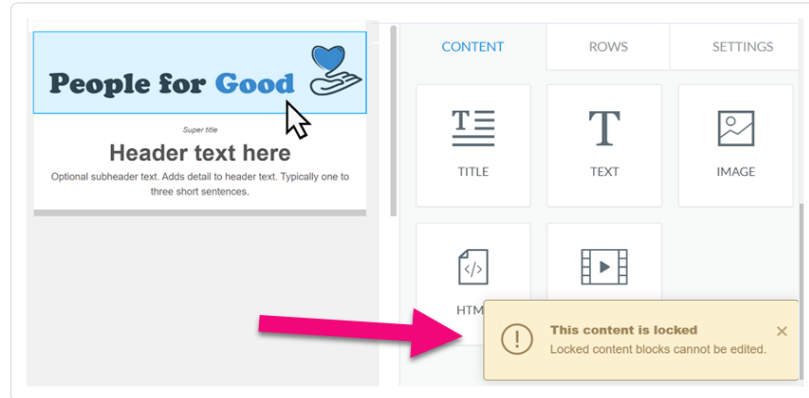
Start From Scratch ↘ Letter - Basic Letter - Basic Letter - Clean

You can preview the template by clicking the thumbnail image. If that's the one you want, **select Use this template. Or, select Start from Scratch** if you prefer to create a free-form email without a template.

Once you've selected your template, the Drag & Drop editor will open and you will be able to compose your message as usual.

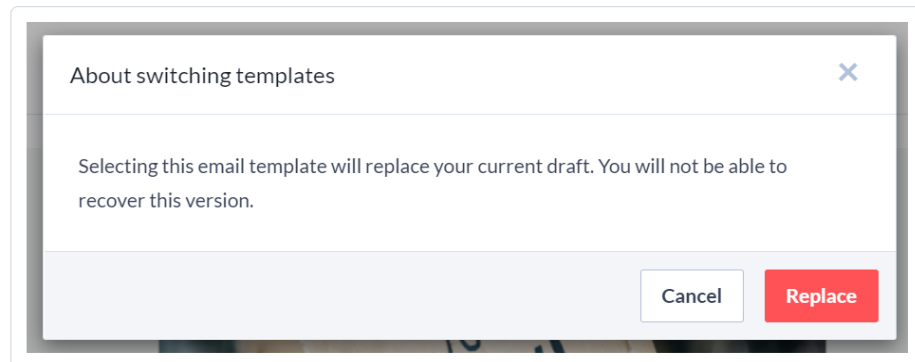
[Read more about creating mobile-ready messages with Drag & Drop](#)

The template you select may have **certain rows or elements which are locked** and are not editable as part of your email. You will see a warning when you try to edit these elements. In order to change these elements, you will need to edit the template.



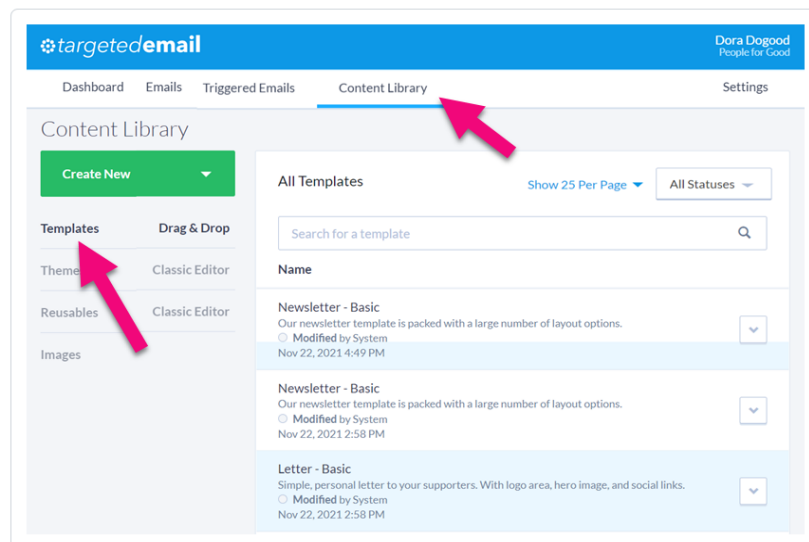
Switching templates as you compose

You can switch templates at any time when you are creating your Drag & Drop email, however, you will lose the progress you have made with the current design. Select a new template by using the link at the top left corner of your screen. Confirm the action by selecting **Replace**.



Using the Content Library

You can **find all your templates listed in the Content Library**. When you first open the list, you may see several default templates already included in Targeted Email under the Content Library tab. Open the Templates section to see the full list of available templates.



Any default templates in your list will always appear as **Modified by System**. While you cannot edit default templates, you are allowed to copy them so you can make your own version.

You can **Copy**, **Send a Sample Email**, or **Preview** any of your templates using the dropdown menu.

All Templates Show 25 Per Page All Statuses

Search for a template

Name

Newsletter - Basic
Our newsletter template is packed with a large number of layout options.
○ Modified by System
Nov 22, 2021 4:49 PM

Newsletter - Basic
Our newsletter template is packed with a large number of layout options.
○ Modified by System
Nov 22, 2021 2:58 PM

Copy
Send In Sample Email
Preview

Creating your own templates

You can begin creating a new template by selecting **Create New > Template** from the Content Library tab in Targeted Email.

targetedemail

Dashboard Emails Triggered Emails **Content Library**

Content Library

Create New

Template
Theme
Reusable

All Templates

Search for a template

Name

Newsletter - Basic
Our newsletter template is packed with a large number of layout options.
○ Modified by System
Nov 22, 2021 4:49 PM

You can also begin by copying another template.

All Templates Show 25 Per Page All Statuses

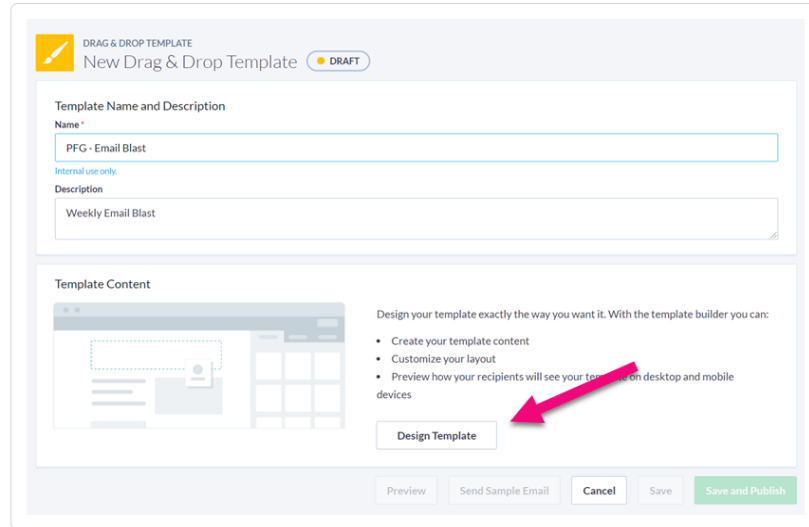
Search for a template

Name

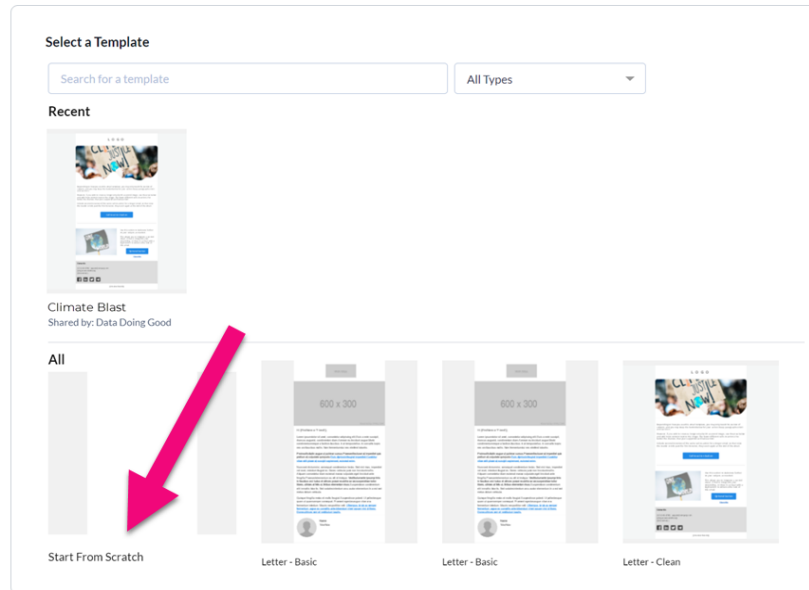
Newsletter - Basic
Our newsletter template is packed with a large number of layout options.
○ Modified by System
Nov 22, 2021 4:49 PM

Copy
Send In Sample Email
Preview

After naming your template and providing a description, select **Design Template** to begin designing in the Drag & Drop editor. [Read more about designing with Drag & Drop](#)

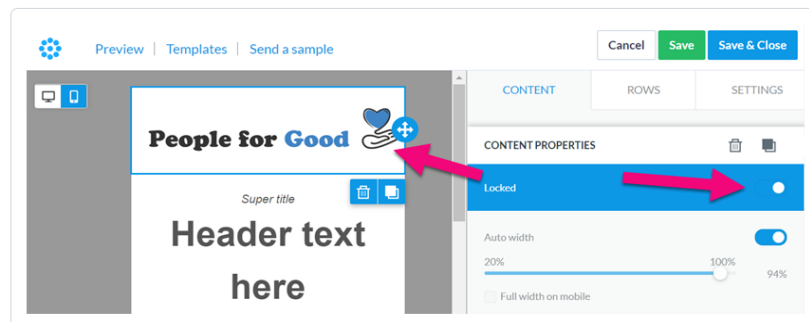


If you want to base your template on a pre-existing design, you can select one of the templates in the list. Or, you can create a free-form design if you Start from Scratch.



You can then create the rows and content objects you need for your email template.

At the top of the Properties section for each row or content section, you will see a **toggle that will allow you to lock or unlock that element**. Locked elements will not be editable by anyone using your template and can be used to include unchangeable elements in your design, like logos, buttons, or links.



A few more design tips for creating a usable template:

- **Add explanatory text** that will help someone using your template understand what they can and should edit as part of their message
- Double-check that your **design is mobile-friendly**
 - [Read more about mobile-friendly design with Drag & Drop](#)
- Preview your design and Send a Sample to yourself or others so you can **view it on several different email platforms** before you publish your template
 - [Read more about designing good content](#)

Assigning access to your template

Your template will automatically be visible to anyone else in your committee. If you are using a multi-committee setup, you will be able to **select which committees can use your template** and whether or not they will have editing access from the template details page. Leaving the edit box unchecked will help you keep you enforce your design by preventing your affiliates from unlocking the rows or content elements in your templates.

Committee Access

Committees with Access
People for Good

Committees with access can edit template

Committees without Access

- PFG - Alabama
- PFG - California
- PFG - Denver
- PFG - Finland
- PFG - Georgia
- PFG - Hawaii
- PFG - Indiana
- PFG - Kansas

Editing or deactivating your template

Once a template has been published, if you have editing access, you will be able to open it using the link on the list of templates in the Content Library.

All Templates Show 25 Per Page All Statuses

Search for a template

Name	Owner Committee
PFG - Email Blast Weekly Email Blast ● Modified by Dora Dogood Dec 7, 2021 5:22 PM	People for Good <input type="button" value="v"/>

From the template details page, you can then

- Edit the name and description
- Edit the design
- **Assign committee access**
- **Preview** and send a sample
- **Deactivate the template** for everyone going forward (any existing emails will not be affected)
- Save and **Publish**

Was this article helpful?

0 0

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