



CLUB CADDIE

a *JUNAS* Software Company

Email Marketing Automation Training

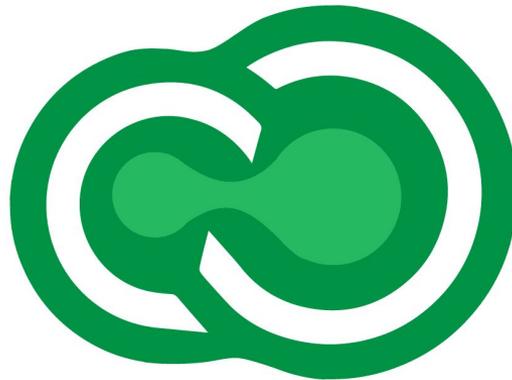
Template Editor

Email Marketing Automation Training

Courses

1. Advanced Automation
2. Content Blocks + Dynamic Content
3. Edit Footers
4. Automated Messages
5. Survey Creator
6. Site Visitor Signup Box
- 7. Template Editor**

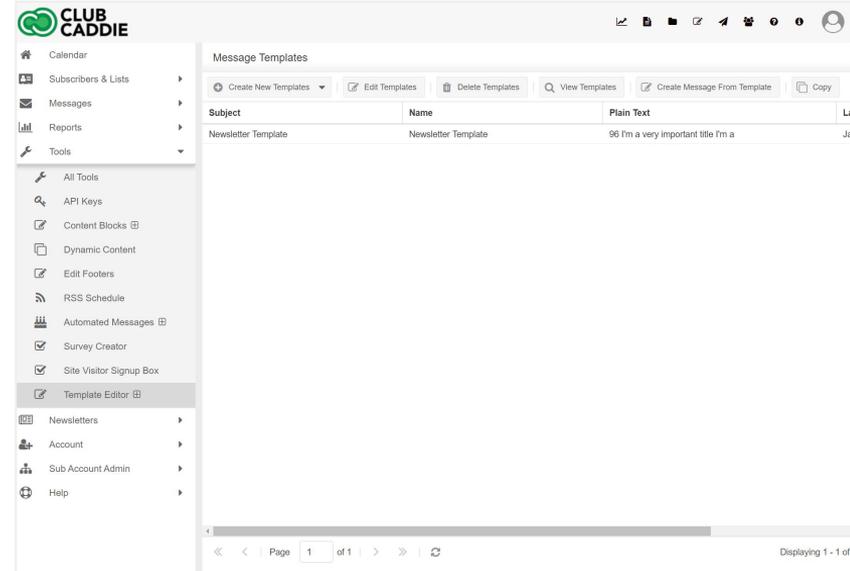
Template Editor



Create a Custom HTML Email Template

A template can be used to create multiple emails. This template will show your custom layout and can contain your company branding. You'll have access to a variety of premade templates and template block templates as a new user. However, if you would like to create a custom HTML email template, please follow the steps below.

1. Open the **Tools** folder
2. Click **Template Editor**
3. Click the **Create New Template** button
4. Enter a Subject (used as the template name)
5. Start creating the template or copy and paste your HTML code into the Source view
6. Create editable content areas, as explained below in the Template Help Instructions below
7. **Save** the Template
8. Your custom template will now show in the **Templates** section when [creating a new message](#)

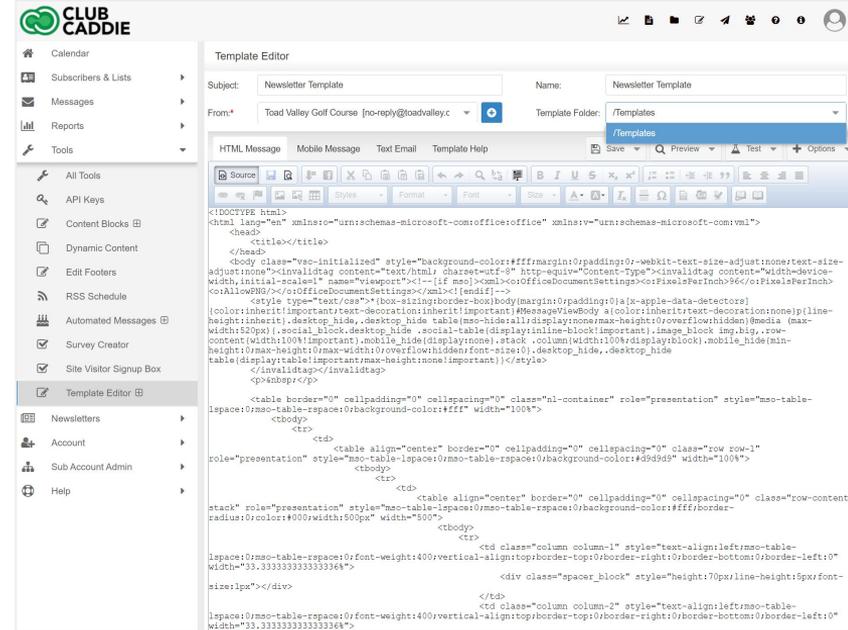


Template Help Instructions

You must specify what areas of the template are going to be editable by the user creating a message with it. By default, all areas of the template will be locked down and not editable. To specify what areas will be editable, you must surround them with `<cicontent1>` `</cicontent1>` tags.

1. Click **Source** to view the source code of the template
2. Find the area you would like to make an editable region
3. Surround the content with `<cicontent1>` `</cicontent1>` tags
 - a. Table cells `<td>`, Span tags ``, and sections `<div>` all support the `<cicontent1>` tags
 - b. Each table cell, span tag, and section can hold only one content region
 - c. Cicontent tags are uniquely numbered, so after `<cicontent1>``</cicontent1>` you'll insert a `<cicontent2>``</cicontent2>`
 - d. There can be up to 100 `<cicontent1>``</cicontent1>` areas

Once a template is created, it will show under "Templates" when a user creates a new message.

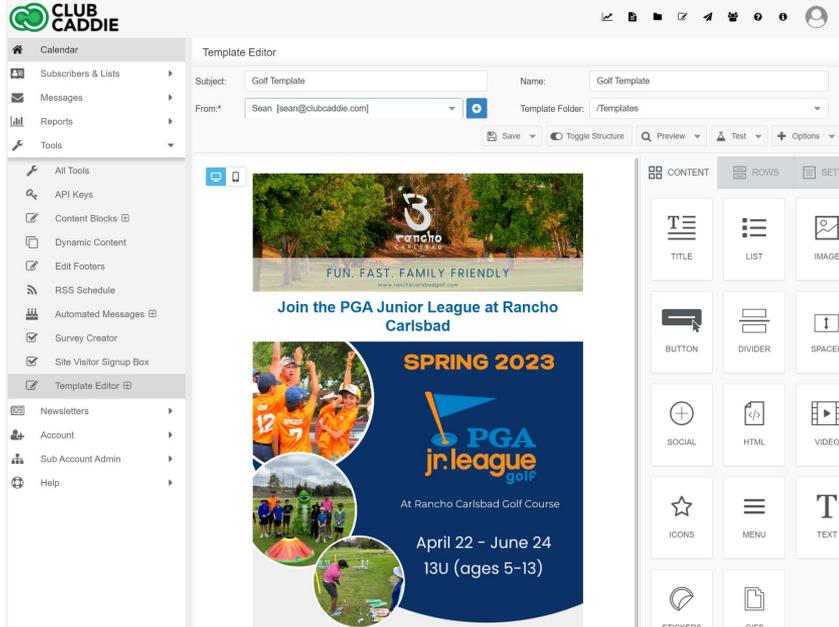


The screenshot shows the Club Caddie Template Editor interface. On the left is a sidebar with a list of tools including Calendar, Subscribers & Lists, Messages, Reports, and various editing tools like All Tools, API Keys, Content Blocks, Dynamic Content, Edit Footers, RSS Schedule, Automated Messages, Survey Creator, and Site Visitor Signup Box. The 'Template Editor' tool is selected. The main area displays the 'Newsletter Template' with fields for Subject, From, and Template Folder. Below these is a 'Source' button and a code editor showing HTML source code. The code includes a DOCTYPE declaration, a head section with a title, and a body section with various styling and content blocks, including a table structure with nested divs and spans.

Create a Drag and Drop Template

A template can be used to create multiple emails. This template will show your custom layout and can contain your company branding. You'll have access to a variety of premade templates as well. However, if you would like to create a custom drag and drop email template, please follow the steps below.

1. Open the **Tools** folder
2. Click **Template Editor**
3. Click the arrow on the side of the **Create New Template** button, and select **Create New Templates (Drag and Drop)**
4. Enter a Subject (this will be used as the template name)
5. Start creating the template by dragging in content and row layouts
6. **Save** the Template
7. Your custom template will now show in the **Templates** section when [creating a new message](#)



The screenshot displays the Club Caddie Template Editor interface. On the left is a navigation menu with categories like Calendar, Subscribers & Lists, Messages, Reports, Tools, All Tools, API Keys, Content Blocks, Dynamic Content, Edit Footers, RSS Schedule, Automated Messages, Survey Creator, Site Visitor Signup Box, Template Editor, Newsletters, Account, Sub Account Admin, and Help. The main area is titled 'Template Editor' and shows a preview of an email template. The template has a subject line 'Golf Template' and a name 'Golf Template'. The email content includes a header image for 'Rancho Carlsbad' with the tagline 'FUN. FAST. FAMILY FRIENDLY', followed by the text 'Join the PGA Junior League at Rancho Carlsbad'. Below this is a large blue graphic for 'SPRING 2023 PGA jr. league GOLF' with a date range of 'April 22 - June 24' and '13U (ages 5-13)'. The right side of the editor shows a 'CONTENT' panel with various drag-and-drop elements like TITLE, LIST, IMAGE, BUTTON, DIVIDER, SPACER, SOCIAL, HTML, VIDEO, ICONS, MENU, TEXT, STICKERS, and LINKS.

Create a Message From a Template

To create a message from a custom template:

1. Click on the **Messages** folder
2. Click **Create New Message**
3. Select a **custom template** or one of the pre-built templates in the system
4. Edit the content regions by clicking once and selecting edit content
5. Customize a pre-built template using the tools at the top of the screen:
 - a. Edit Template Formatting (customize borders, background colors)
 - b. Clear Template Formatting
 - c. The Undo and Redo buttons go back and forth between edits to the template formatting only
6. Click **Save** to save changes

