

HOW TO / use the template builder



The template builder is only available to Marketers through the **Company Admin account**, and is meant to empower Marketers to create Templates on their own that they can then publish to their agents. Our hope is that this helps you easily create a robust template while still adhering to design standards.

The template tool can be accessed through the Company Admin Account by clicking **Create New Template** from the **Marketing Materials** drop down menu.

Note that when you name and create your template, the checkbox to restrict the template from your agents is automatically checked. Keeping this checked will allow you to work on and publish your template without agents being able to see it. Once it's published, please remember to go in and un-restrict it in order to make it available to agents!

Once you've created your template, you'll see the template tool interface. You'll see three tabs on the left hand side in the tool box titled Edit your Template Layout. These tabs are **Template, Section and Content**. You should start in the Template tab as this involves the overall attributes of the template, and then move on to Section and Content. Some things to note:

- 1 **You must first add a Section in order to add Content to it.**

The editor will not allow you to drop content anywhere that is not in a section.

- 2 **Only 1 Section can be made editable after publishing.**

Therefore, if you enable a section to be editable (this can include multiple content blocks i.e. it can include both an image and a text box), you will not be able to make another section editable. If you choose to change which area is editable - you can come back and edit the template at a later time.

- 3 **It's best to drag Sections and Content into your template in the order you'd like them to appear.**

For example, drag your pre-header first, header second, body third, footer last. Of course, you can omit any sections you choose not to include in your template.

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When dragging and dropping Section and Content blocks, please make sure the drag and drop area has a highlighted blue box around it and reads “insert here” in order to successfully drop the section in.

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Once you’ve added a Section or Content Block, you can edit or delete that section by hovering over it.

For example, if you click within a Content Message block, the WYSIWYG editor tool bar will pop up so you can start editing. If you choose to delete, you can click the trashcan icon and a prompt where the trash icon was will come up asking you to confirm yes or no. By hovering over a section you can also duplicate that section. The duplicate icon is located to the left of the delete icon.

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When you are done working on your template, you can choose to finish later, or to Publish.

(the button is on the bottom the Edit Template Layout menu). Although this published your piece, if you’ve kept the template restricted you’ll need to un-restrict that template by unchecking the box in order for agents to have access to it.

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You can find your template under Marketing Tools > Reporting and Scheduling.

Here, you can continue editing the template, un-restrict it (or restrict it if you’ve un-restricted it to begin with), etc.

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Please keep in mind that the template tool saves your work as you go, but if you make changes to a published, un-restricted piece- those changes will not be reflected for your agents until you click Publish after making the edits.

It is still possible to have us build templates for you as it has always been, through the same process. But, we are hopeful that over time this tool will provide you with a quick and easy way to create beautiful templates all on your own. We encourage you take some time to familiarize yourself with the template builder and get to know it’s capabilities!



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