

How to reconfigure your template portfolio for

# Smart Templates



Have you ever felt the pain of managing a large portfolio of email templates? Rebranding them, updating links or legal information – ensuring consistency across a large number can be a nightmare.

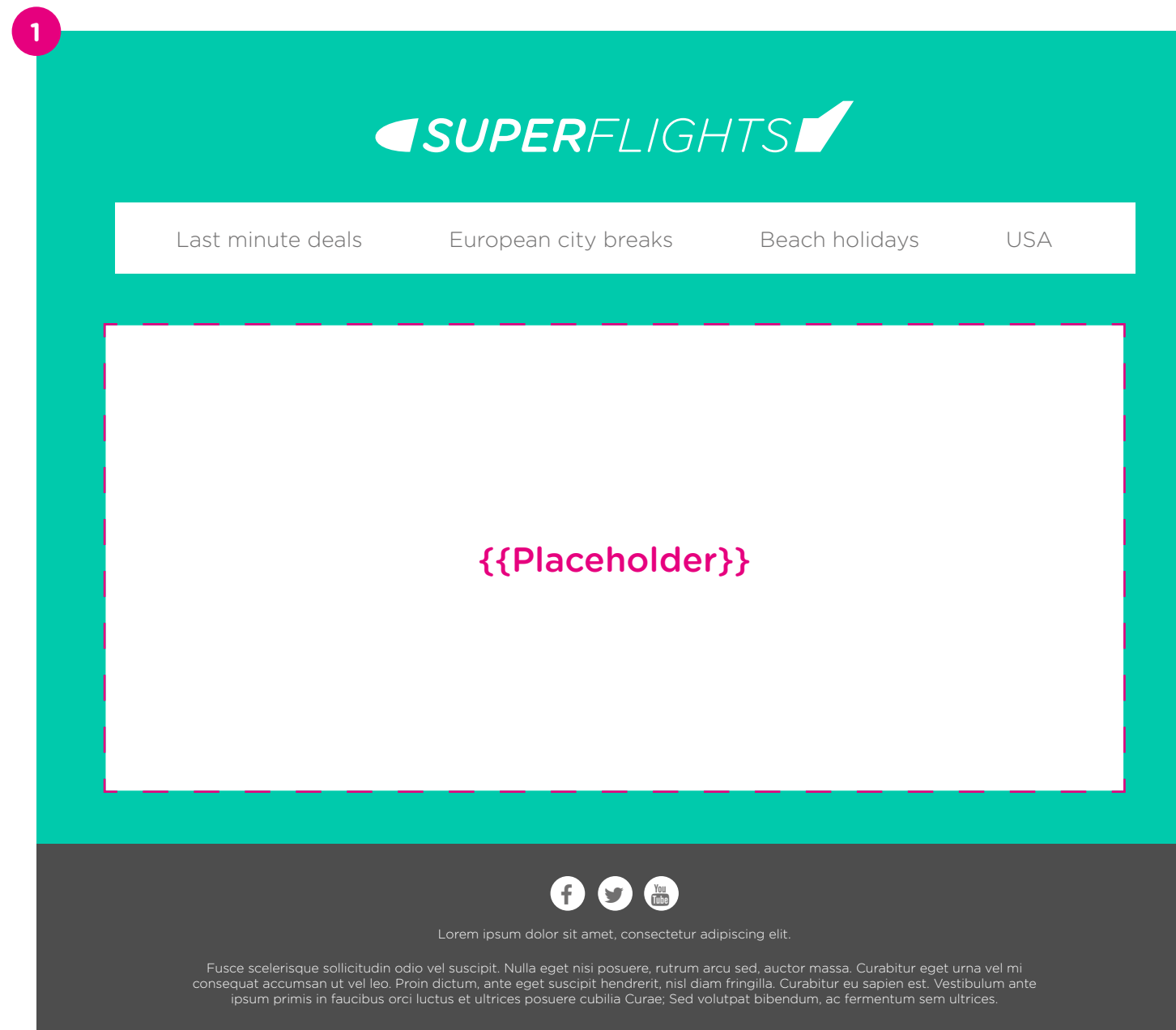
That’s exactly the reason why we developed our Smart Templates tool. Happily, it’s now live and available to all Communicator users at no extra cost.

### Getting started

To reap the benefits of Smart Templates, you’ll have to spend a little time reconfiguring templates to suit this new method.

As someone with experience managing numerous templates for our customers, it’s certainly time worth investing.

As Smart Templates works on a hierarchy basis, the first thing you’ll need to define is your master template<sup>1</sup>. This will be a simple layout of a standardised header and footer, with one placeholder in between them reserved for content. If you’re likely to include separate terms on a campaign by campaign basis, you may also want an additional placeholder at the bottom.



## Creating a sub template

Once you've got your master template ready in Communicator in the usual way, you can create your first sub template – or 'smart' template, if you will.

Do this by selecting your master template and selecting **New Smart Template** from the navigation<sup>2</sup>.

Whether you've been using the Drag & Drop Designer or our HTML Template Builder, you'll jump back into the same building interface which will allow you to build (and name) your new sub-template.

You'll notice that your master template is completely un-editable and the only area you can edit is your placeholder. This is where you can add content styling and regular email placeholders to finish off what will become a full template<sup>3</sup>.

You can then save your new sub-template and use the New Email link in the navigation to move to the Templated Email Builder and populate any remaining placeholders as you please, adding dynamic content if necessary.

## Unlimited hierarchy

If you have the need, you can add further sub-templates to sub-templates. This will be useful if you have a standardised newsletter style but have a varying number of content each time you send. You can then use Smart Templates to add in additional sections, meaning you'll always have a template to suit your needs.

Here's an example of how you could grow your portfolio with Smart Templates, using a screenshot from the new Hierarchy view from the navigation<sup>4</sup>.

**2** New Edit Details Copy Preview Hierarchy **New Smart Template** New Email Archive

**3** **SUPERFLIGHTS**  
Last minute deals European city breaks Beach holidays USA  
{{Header image placeholder}}  
{{Image placeholder}} {{Image placeholder}} {{Image placeholder}}  
{{Text placeholder}} {{Text placeholder}} {{Text placeholder}}  
{{Button placeholder}} {{Button placeholder}} {{Button placeholder}}

**4** Template Hierarchy  
Master: Header and Footer #4691  
Sub: Newsletter (2 items) #4692  
Sub: Event 1 #4693  
Sub: Welcome #5118  
Sub: Blog Update #5120  
Sub: Newsletter (2+2 L...) #5119  
Sub: Event 2 #4694  
Sub: Newsletter (4+2 L...) #5121

## Setting up is easier than you think

It may seem a little tedious having to setup templates in this new way, but it really doesn't have to be.

You can add in templates on a campaign-by-campaign basis, meaning you'll not be spending any more time than necessary setting up your new hierarchy portfolio. Or, if you have a need for unnecessary perfection, you can always lean on our Creative Services team to help you migrate your portfolio over in one go.

If you've not updated your templates in a while, this change could also be a good excuse to consider updating templates for a fresh look. And with Smart Templates, the next time you have to update your branding, you'll only ever have to modify the Master Template.

## Get started now

**Smart Templates is now available to all Communicator users free of charge.**

**Login to the platform now to try it out or contact your Account Manager if you'd like to use our Creative Design Services to help you migrate over.**