

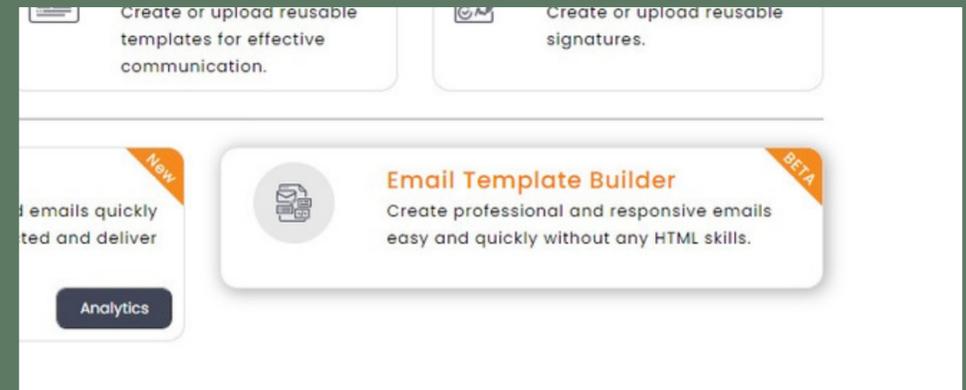
WITH AMANDA RICHARDS
TUESDAY NOVEMBER 17, 2020

Daily Bite Size Training

Topic:
Updating & Copying a Template

How to copy a template

1. Go to Engagement and select template builder
2. Click Email Template Folder
3. Hover over the 3 orange dots
4. Click Copy
5. The copy will appear at the top with name_copy

A screenshot of a table listing email templates. The table has columns for "#", "Template Title", "Type", "Date Created", and "Action". A context menu is open over the first row, showing options: "Edit", "Send to Myself", "Share", "Move", "Copy", and "Delete".

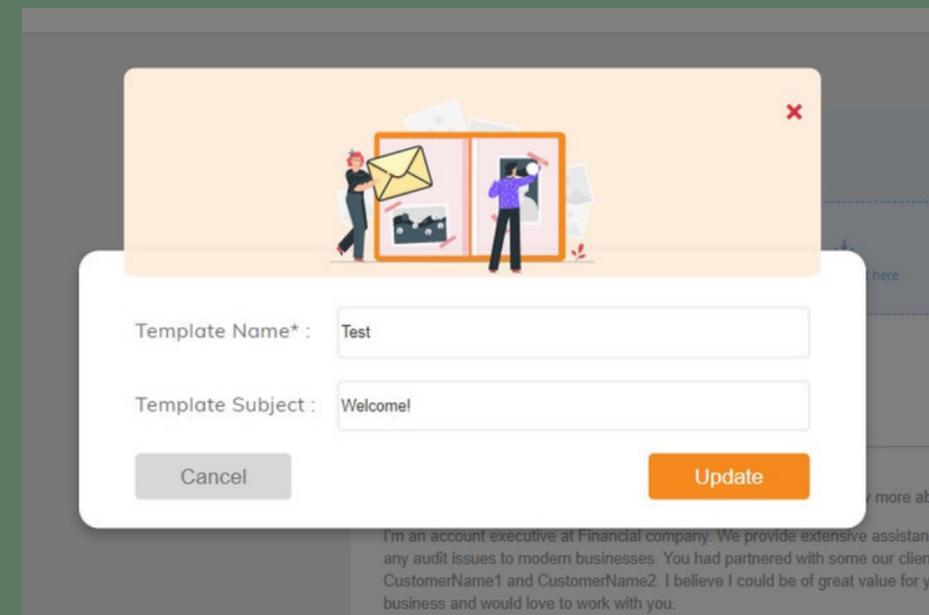
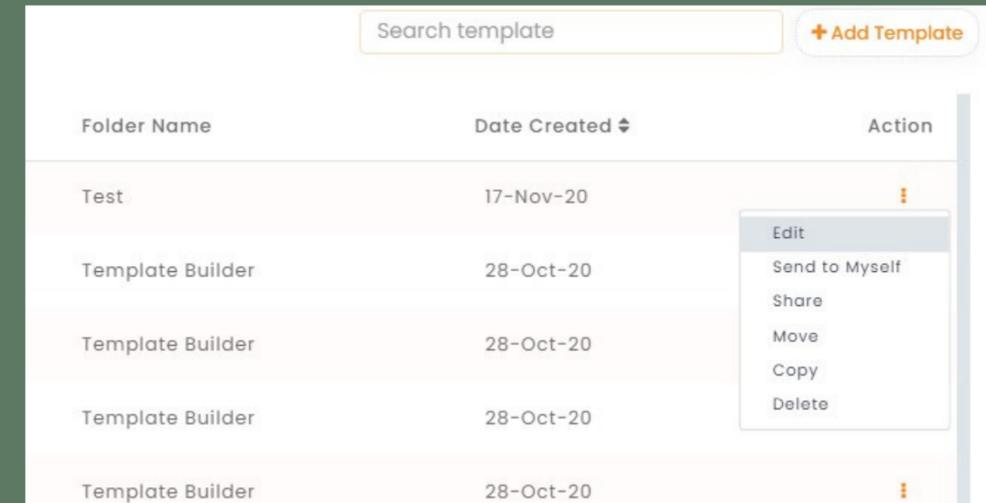
#	Template Title	Type	Date Created	Action
1	Tem 1_copy	Email	18-Apr-20	<ul style="list-style-type: none">EditSend to MyselfShareMoveCopyDelete
2	Tem 1	Email	18-Apr-20	
3	Welcome to InsuredMine!!!	Text	23-Mar-20	
4	Support	Email	09-Mar-20	
5	Last Deal Followup	Email	09-Mar-20	
6	Welcome message	Email	09-Mar-20	
7	65th Birthday	Email	09-Mar-20	

A screenshot of a table showing the result of copying a template. The table has columns for "#", "Template Title", and "Type". The first row is highlighted in orange and shows "Tem 1_copy" under "Template Title" and "Email" under "Type". The second row shows "2" under "#", "Test Gif" under "Template Title", and "Email" under "Type".

#	Template Title	Type
	Tem 1_copy	Email
2	Test Gif	Email

How to update a template

1. Go to Engagement and select Template Builder
2. Hover over 3 orange dots and select Edit
3. Make necessary changes and click Save
4. This pop up screen will appear, update Template Name & Subject and click Update



THANK YOU!

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