

**Reward-it**

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## **PASS: how to set up an email template**

**Reward-It Ltd**

## 1. How to open a new template

- Firstly, log into PASS.
- Then navigate to Marketing > Email Templates to create your new template.
- Press + on the left hand side to open the Email setup page



## 2. You will then have to fill in the following sections:

- Name – enter the name you would like to call your email template (This is not seen by the recipient)
- Valid from date – Choose today's date
- Valid until – Leave this blank
- No HTML – Leave this unticked
- Attachment – Add or delete a file attachment if needed. You may not need this for standard HTML emails.
- From: CUSTOMER NAME <from@emailaddress.com>

Ensure the email address isn't a public email address (i.e. Gmail, Yahoo, Hotmail) as the emails won't be delivered. Use an email address ending in your domain (Example@reward-it.co.uk).

This field may be pre-filled with the email address you currently use.

- Subject – Enter an email subject
- CC – leave blank
- BCC – leave blank

## 3. Setting out the email content:

Use header / Use Footer – If you have already set up a Header and Footer, tick these boxes and select the appropriate ones from the drop down menu.

<b>Use header</b> <input checked="" type="checkbox"/>	<b>Use footer</b> <input checked="" type="checkbox"/>
Polish Taste Header ▾	Footer ▾

(Please read separate instructions for setting up headers and footers)

In the body of the email type your content.

You are able to format your text using the controls at the top of the window.

## 4. Adding in images/placeholders:

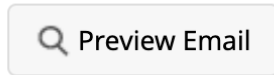
You are able to copy images and paste these into the body box.

Make sure the images are JPEGs, open the image in MSPaint or OSX Preview, Click Edit, Copy, and paste into the email body box. You can then justify the image to the left, centre or right.

Within the body you can use various placeholders that will be replaced once the email is sent.

## 5. Previewing your email:

You can then preview how your email will look by clicking on the Preview button:



Once happy, click Save.