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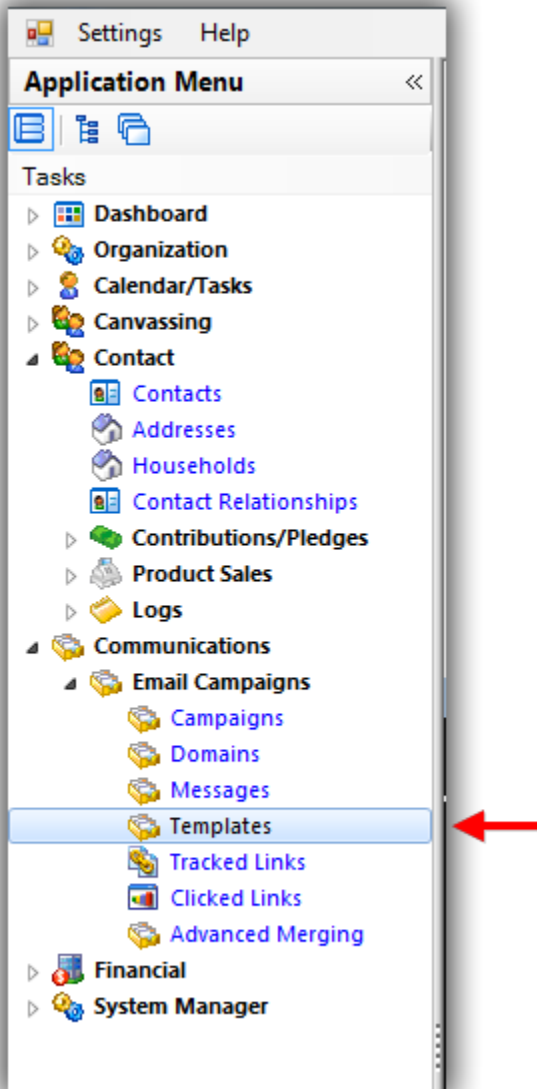
## Overview

This article provides a quick overview on how to **create a new email template**, **save** it, and **load** it from different areas of the program.

 **Tip:** Get an in-depth overview on how to **design templates**, upload and wrap text around images, etc. by watching [this video](#) tutorial.

## Steps

Open the **Templates** list by following **Application Menu > Communications > Email Campaigns > Templates**. *If you don't see this list you don't have the required [security clearance](#).*



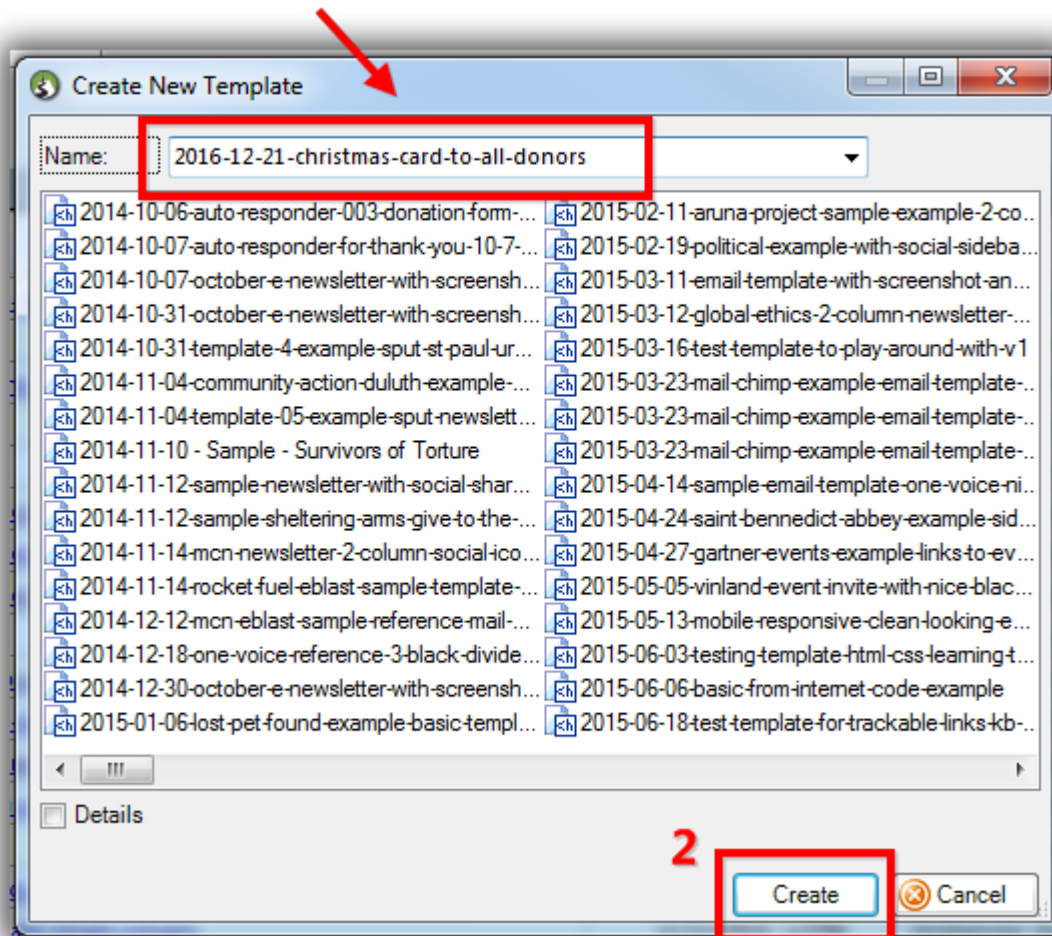
Click [+ New] on the Search tool strip.

The screenshot shows the TrailBlazer application interface. On the left is an 'Application Menu' with categories like Tasks, Communications, and Financial. The main window is titled 'Email Templates' and features a search tool strip with a '+ New' button highlighted in red. Below the search strip is a form with 'Template Name' and 'Subject' fields. At the bottom, a table displays a list of email templates.

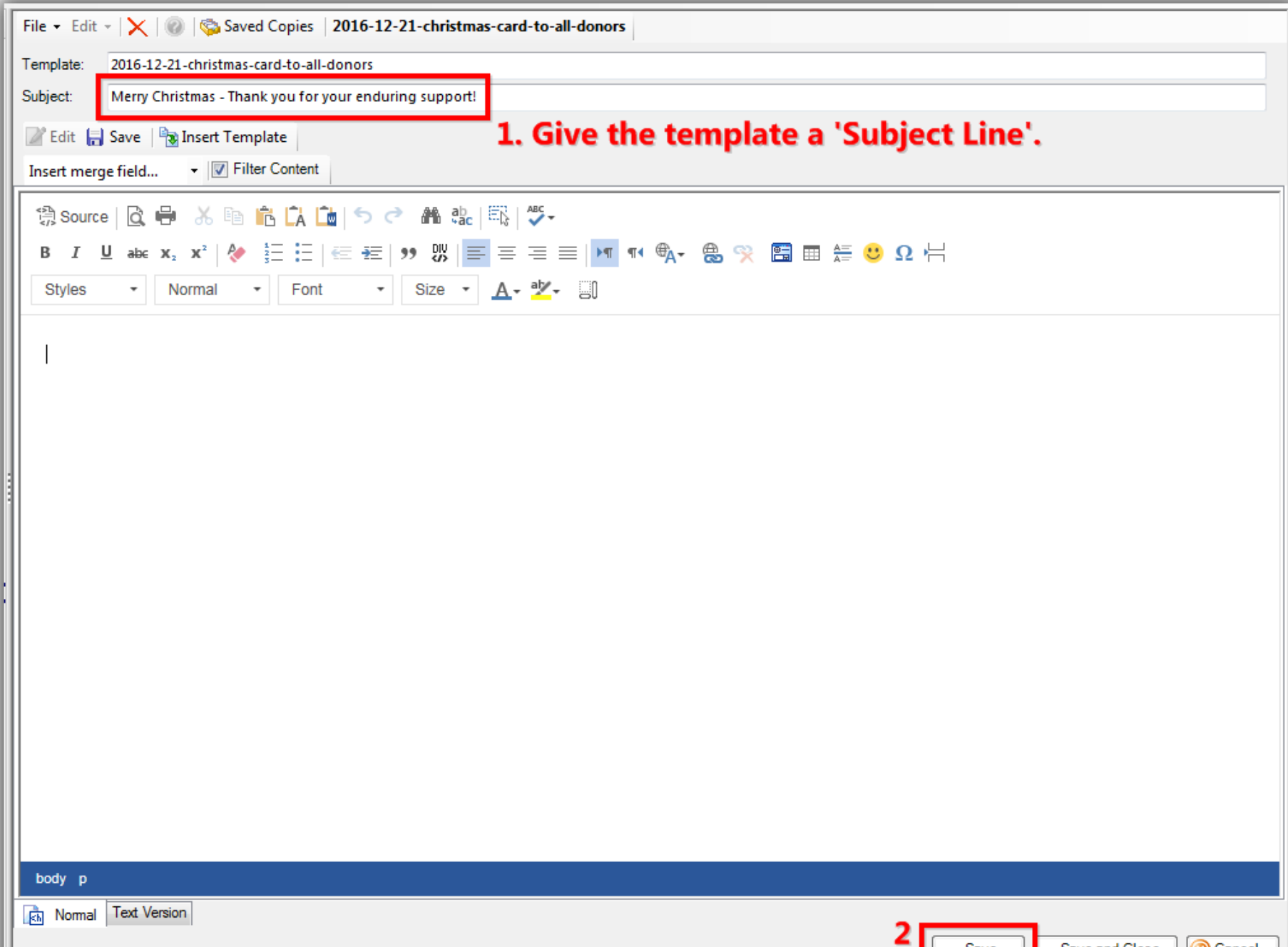
Template ID	Name	Date Created	Created By ID	Created By	Use Count
2	2016-02-22-template-2-2-column-simple-newsletter-use-as-starter-for-standard-trail-blazer-template	11/9/2009	1	Admin, Admin	0
3	2016-02-22-template-1-one-column-head-footer	11/9/2009	1	Admin, Admin	0
4	2016-02-22-example-basic-donation-auto-responder-1-donation-thank-you	1/2/2012	1	Admin, Admin	0
16	2016-02-22-template-3-basic-1-column	1/17/2011	1	Admin, Admin	0
22	2016-02-22-auto-responder-2-signup-post--mobile-responsive	9/15/2014	1	Admin, Admin	1
24	2016-02-22-test-cancer-research-fund-with-merge-fields-new-source-code-from-wiziq-ck-editor	10/6/2014	12796	Kristenson, Joel Anders	0
25	2016-02-22-auto-responder-003-donation-form-v2-thank-you-with-merge-fields	10/6/2014	12796	Kristenson, Joel Anders	0
26	2014-10-06-auto-responder-003-donation-form-v2-thank-you-with-merge-fields-test-3	10/6/2014	12796	Kristenson, Joel Anders	0
28	2014-10-07-auto-responder-for-thank-you-10-7-2014	10/7/2014	1	Admin, Admin	0
35	2014-10-31-october-e-newsletter-with-screenshot-and-link-to-pdf-document	10/31/2014	1	Admin, Admin	0
36	2014-10-31-template-4-example-sput-st-paul-urban-tennis-nice-clean-basic-template-newsletter-with-text-wrapped-image...	10/31/2014	1	Admin, Admin	0
37	2014-11-04-template-05-example-sput-newsletter-with-text-wapped-images-v2-good-example-for-prospective-customers	11/4/2014	12796	Kristenson, Joel Anders	0

Create a name and click [OK].

## 1. Create a name.



Enter a catchy **subject line** and click [**Save**].



File ▾ Edit ▾ | X | Saved Copies | 2016-12-21-christmas-card-to-all-donors

Template: 2016-12-21-christmas-card-to-all-donors

Subject: Merry Christmas - Thank you for your enduring support!

Edit Save Insert Template

Insert merge field... Filter Content

Source | Print | Cut | Copy | Paste | Undo | Redo | ABC | ABC

B I U abc x<sub>2</sub> x<sup>2</sup> | List | Indent | Outdent | Paragraph | Bulleted List | Numbered List | Table | Link | Unlink | Image | Video | Table | Font Color | Background Color | Text Color | Text Background Color

Styles ▾ Normal ▾ Font ▾ Size ▾ A ▾ ab ▾

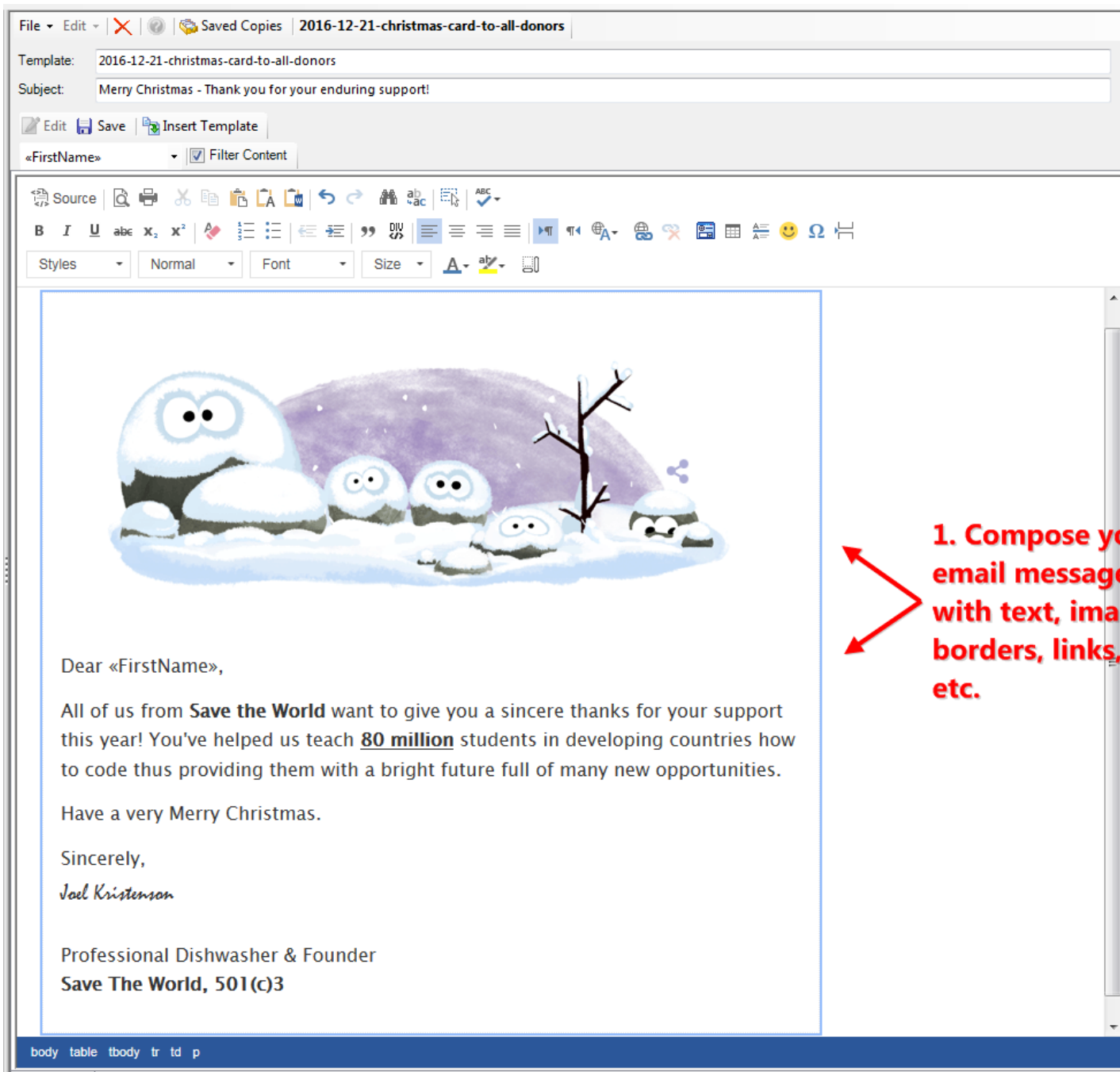
body p

Normal Text Version

2 Save Save and Close

**Compose your message** with text, images, links, etc.

Once you're finished click [**Save and Close**]. *My finished example is below.*



The screenshot shows an email editor window with the following content:

File ▾ Edit ▾ | Saved Copies | 2016-12-21-christmas-card-to-all-donors


Template: 2016-12-21-christmas-card-to-all-donors

Subject: Merry Christmas - Thank you for your enduring support!

«FirstName» | Filter Content

Source | Copy | Paste | Undo | Redo | Bold | Italic | Underline | Text Color | Background Color | Bulleted List | Numbered List | Indent Left | Indent Right | Link | Unlink | Table | Table of Contents | Spell Check | Help

Styles | Normal | Font | Size | Text Color | Background Color



Dear «FirstName»,

All of us from **Save the World** want to give you a sincere thanks for your support this year! You've helped us teach **80 million** students in developing countries how to code thus providing them with a bright future full of many new opportunities.

Have a very Merry Christmas.

Sincerely,  
*Joel Kristenson*

Professional Dishwasher & Founder  
**Save The World, 501(c)3**

body table tbody tr td p

1. Compose your email message with text, images, borders, links, etc.



To access this template again in the future you can navigate back to the **Templates** list, click **[Search]** and **sort** in descending order on the **Template ID** column.

Settings Help **2**

Application Menu Search Reset + New [Icons] File Edit Email Templates

Tasks

- Dashboard
- Organization
- Calendar/Tasks
- Canvassing
- Contact
- Communications
  - Email Campaigns
    - Campaigns
    - Domains
    - Messages
    - Templates **1**
    - Tracked Links
    - Clicked Links
    - Advanced Merging
- Financial
- System Manager

Favorites General SQL

Template Name:

Subject:

**3. Sort in descending order.**

**4. Click on the template name to open it to make changes.**

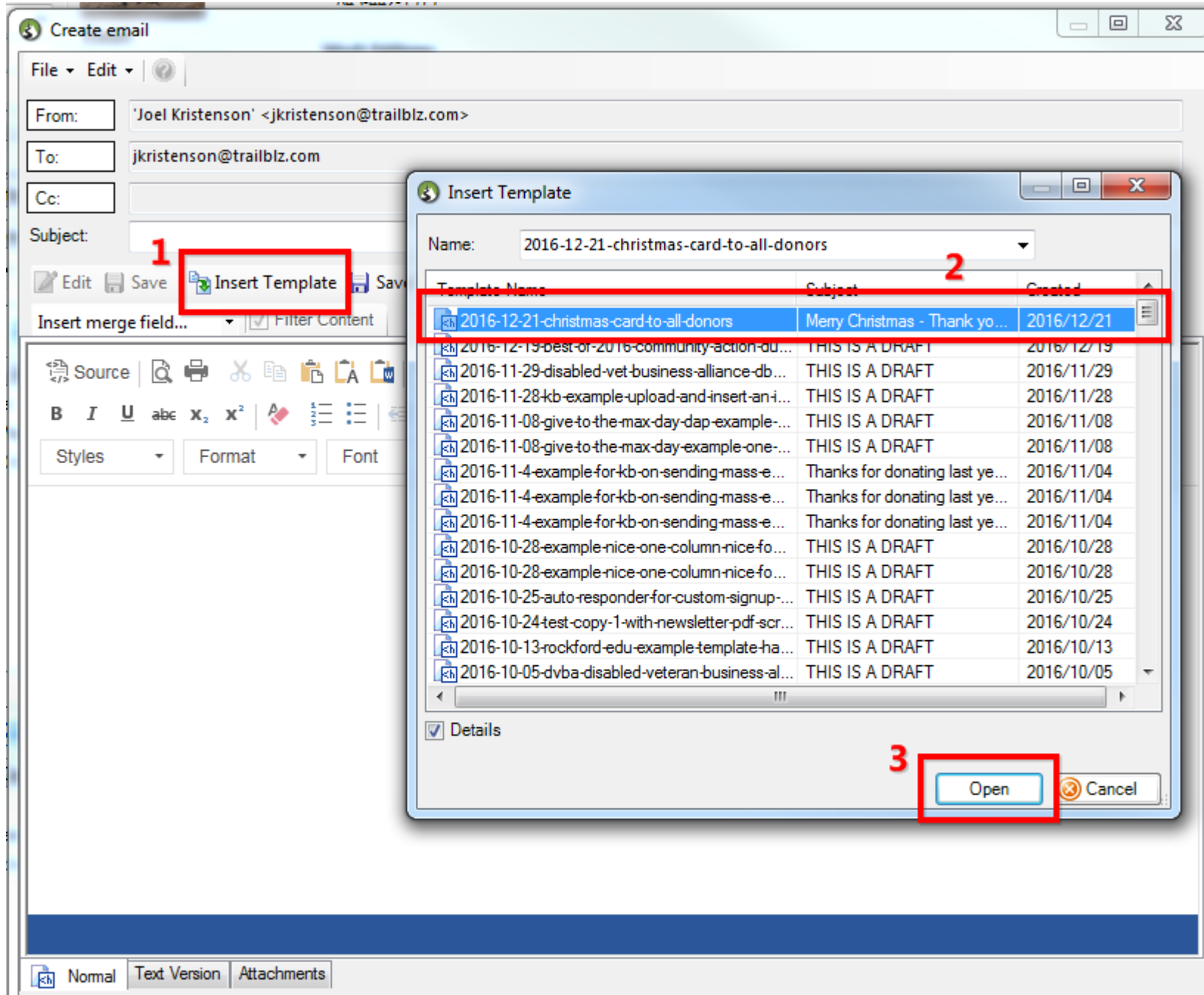
Sort Format Wrap Export Print Pivot

Email Templates [ 179 records found ]

Template ID	Name	Date Created	Created By ID	Created By	Use Count	Subject
247	<a href="#">2016-12-21-christmas-card-to-all-donors</a>	12/21/2016	12796	Kristenson, Joel Anders	0	Merry Christmas - Thank you for your enduring support!
243	<a href="#">2016-12-19-best-of-2016-community-action-duluth-great-email...</a>	12/19/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
241	<a href="#">2016-11-29-disabled-vet-business-alliance-dbva-nice-newslette...</a>	11/29/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
240	<a href="#">2016-11-28-kb-example-upload-and-insert-an-image-v1</a>	11/28/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
238	<a href="#">2016-11-08-give-to-the-max-day-dap-example-nice-pictures-wit...</a>	11/8/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
237	<a href="#">2016-11-08-give-to-the-max-day-example-one-from-dap-help-...</a>	11/8/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
236	<a href="#">2016-11-4-example-for-kb-on-sending-mass-email-lybunt-app...</a>	11/4/2016	12796	Kristenson, Joel Anders	0	Thanks for donating last year! Please consider giving again this ...
235	<a href="#">2016-11-4-example-for-kb-on-sending-mass-email-lybunt-app...</a>	11/4/2016	12796	Kristenson, Joel Anders	0	Thanks for donating last year! Please consider giving again this ...
234	<a href="#">2016-11-4-example-for-kb-on-sending-mass-email-lybunt-app...</a>	11/4/2016	12796	Kristenson, Joel Anders	0	Thanks for donating last year! Please consider giving again this ...
233	<a href="#">2016-10-28-example-nice-one-column-nice-font-basic-template...</a>	10/28/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
232	<a href="#">2016-10-28-example-nice-one-column-nice-font-basic-template...</a>	10/28/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
231	<a href="#">2016-10-25-auto-responder-for-custom-signup-form-with-a-us...</a>	10/25/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
230	<a href="#">2016-10-24-test-copy-1-with-newsletter-pdf-screenshot-link-ex...</a>	10/24/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
229	<a href="#">2016-10-13-rockford-edu-example-template-having-trouble-sp...</a>	10/13/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
228	<a href="#">2016-10-05-dvba-disabled-veteran-business-alliance-event-em...</a>	10/5/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
227	<a href="#">2016-10-04-mcn-eblast-nice-example-for-trail-blazer-standard-t...</a>	10/4/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
226	<a href="#">2016-10-04-mcn-eblast-nice-example-for-trail-blazer-standard-t...</a>	10/4/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
225	<a href="#">2016-09-30-mail-chimp-eblasts-nice-clean-layout-example-for-t...</a>	9/30/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
224	<a href="#">2016-09-30-apple-eblasts-nice-clean-use-as-example-for-trail-b...</a>	9/30/2016	12796	Kristenson, Joel Anders	0	
223	<a href="#">2016-09-29-example-donation-thank-you-receipt-and-appeal-f...</a>	9/29/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
222	<a href="#">2016-09-23-example-appeal-with-trail-blazer-branding-from-d...</a>	9/23/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
221	<a href="#">2016-09-23-example-appeal-with-trail-blazer-branding-from-d...</a>	9/23/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
220	<a href="#">2016-09-23-example-appeal-with-trail-blazer-branding-from-d...</a>	9/23/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
219	<a href="#">2016-09-23-example-appeal-with-trail-blazer-branding-from-d...</a>	9/23/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
218	<a href="#">2016-09-23-example-appeal-with-trail-blazer-branding-from-d...</a>	9/23/2016	12796	Kristenson, Joel Anders	0	THIS IS A DRAFT
217	<a href="#">2016-09-20-event-contribution-total-merge-field-in-action-for...</a>	9/20/2016	12796	Kristenson, Joel Anders	0	Thanks for coming to our big event! (tax-receipt enclosed)
179			2175329		3	

You can open your template to make further changes if necessary.

Now that the template is saved you can use it throughout the program in both [mass email campaigns](#), and individual emails. Simply **queue up a new message**, click **[Insert Template]**, **select** the one you want to use, and click **[Open]**.



The screenshot shows the TrailBlazer interface for creating an email. The 'Create email' window has fields for 'From', 'To', 'Cc', and 'Subject'. A red box labeled '1' highlights the 'Insert Template' button in the toolbar. An 'Insert Template' dialog box is open, showing a list of templates. A red box labeled '2' highlights the selected template row: '2016-12-21-christmas-card-to-all-donors' with subject 'Mery Christmas - Thank yo...' and date '2016/12/21'. A red box labeled '3' highlights the 'Open' button at the bottom of the dialog box.

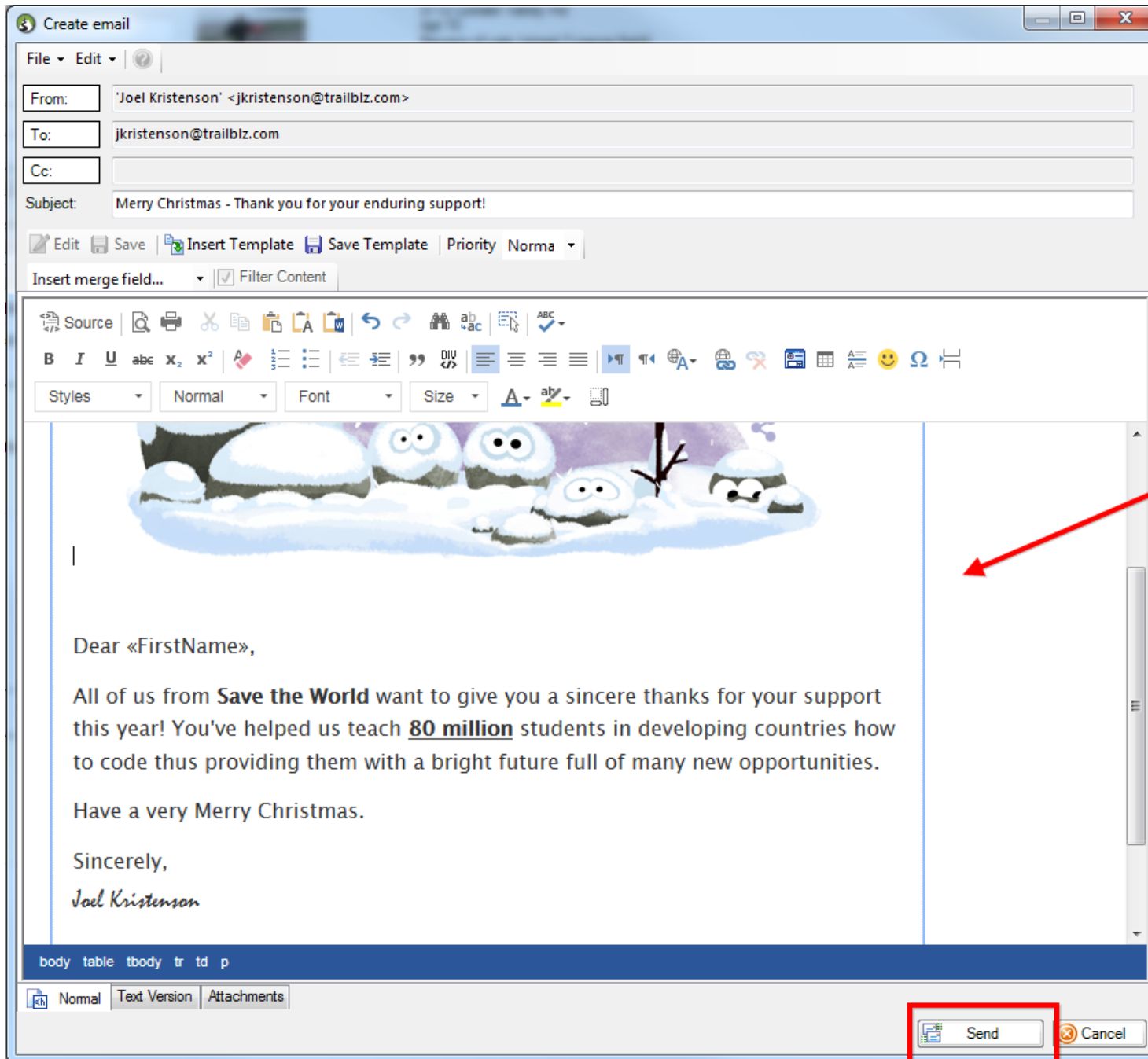
**1** Insert Template

**2**

Template Name	Subject	Created
2016-12-21-christmas-card-to-all-donors	Mery Christmas - Thank yo...	2016/12/21
2016-12-19-best-of-2016-community-action-du...	THIS IS A DRAFT	2016/12/19
2016-11-29-disabled-vet-business-alliance-db...	THIS IS A DRAFT	2016/11/29
2016-11-28-kb-example-upload-and-insert-an-i...	THIS IS A DRAFT	2016/11/28
2016-11-08-give-to-the-max-day-dap-example-...	THIS IS A DRAFT	2016/11/08
2016-11-08-give-to-the-max-day-example-one-...	THIS IS A DRAFT	2016/11/08
2016-11-4-example-for-kb-on-sending-mass-e...	Thanks for donating last ye...	2016/11/04
2016-11-4-example-for-kb-on-sending-mass-e...	Thanks for donating last ye...	2016/11/04
2016-11-4-example-for-kb-on-sending-mass-e...	Thanks for donating last ye...	2016/11/04
2016-10-28-example-nice-one-column-nice-fo...	THIS IS A DRAFT	2016/10/28
2016-10-28-example-nice-one-column-nice-fo...	THIS IS A DRAFT	2016/10/28
2016-10-25-auto-responder-for-custom-signup-...	THIS IS A DRAFT	2016/10/25
2016-10-24-test-copy-1-with-newsletter-pdf-scr...	THIS IS A DRAFT	2016/10/24
2016-10-13-rockford-edu-example-template-ha...	THIS IS A DRAFT	2016/10/13
2016-10-05-dvba-disabled-veteran-business-al...	THIS IS A DRAFT	2016/10/05

**3** Open Cancel

The previously saved template (along with its subject line) will be inserted and ready for use.



**Ex: inserting a saved template.**



Take a look at all the **related resources** below to learn the ins and outs of the email tools in **Trail Blazer**.



### Trail Blazer™

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

## Related Resources

**Article:** [How to Upload and Insert an Image into an Email](#)

**Article:** [How to Send Mass Email Campaigns & Track the Results](#)

**Article:** [How to Send an Email Campaign to People who've Received Specific Email Campaign\(s\) in the Past](#)

**Article:** [How to Add Email Attachments \(i.e. PDF's, Word Docs, Spreadsheets, etc.\) to an Email Template or Mass Email Campaign](#)

**Article:** [How to Delete Unsent Email Campaigns, Test Email Campaigns, and Email Templates](#)

**Article:** [Editing Tracked Links for Mass Email Campaigns – Creating Names for those Missing a Name](#)

**Article:** [Setup a User to Receive Test Emails, How to Send Out Tests of a Mass Email Campaign, and How to Test an Individual Email Template](#)

**Article:** [Adding SPF / DKIM Key to your domain's Txt Record --- Greatly Improve Your Email Open Rates! \(\*\\*requires access to your web host\*\)](#)

**Article:** [How to Import a Google Web Font into your Trail Blazer Email Template](#)

**Article:** [How to Create Custom Email Responders for Specific Events – New 2016 Feature Upgrade](#)

**Article:** [How to Create a Custom Thank-You Auto-Responder Email with Merge Fields for your Online Donation Form](#)

**Article:** [How to Access and Use the Standard Trail Blazer Email Templates as a Starting Point for Template Creation and Mass E-Mail Campaigns](#)

**Article:** [Running an Import of Contact Data from Excel into your Database – Basic Overview](#)

**Article:** [How to Create a Hyperlink around a Screenshot of your Video and Link to the Video from your Trail Blazer Email Template](#)

**Article:** [How to Create a Hyperlink around a Screenshot of your PDF Newsletter and Hyperlink it to the PDF Document](#)

**Article:** [How to Upload Documents to your System Gallery such as PDF's, Spreadsheets, Audio Clips, Image Files, Etc.](#)

**Article:** [Fix your HTML email formatting](#)

**Video:** [Thank you's using mass email](#)

**Video:** [Eblasts –Setting people up to receive test \(draft\) emails](#)

**Video:** [Eblasts Configure email settings before mass emailing](#)

**Video:** [Scheduled Emails](#)

**Video:** [Eblasts Create and Send Eblasts – Includes Image Management](#)

**Video:** [Donation Auto Responders with Merge Fields](#)

**Video Playlist:** [Eblasts](#)



## Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

✉ **Email:** [support@trailblz.com](mailto:support@trailblz.com)

f **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

t **Twitter:** <https://twitter.com/trailblazersoft>

*\* As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

*[Click here](#) to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.*

*\* After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive trainings.*

*\* This service is included in your contract.*