

**\*\*Note:** To show this section of the manual while preserving the anonymity of my previous client, the name of the client has been replaced with “Company” throughout the article and images. Due to this, the section of the end-user manual you will be reading is not formatted. Some of the links that jump to different sections of the manual will be disabled but will represent where links would be present.

# End-User Manual: Company

## Section 6: Gmail Templates

In fostering organizational cohesion, information technology support technicians strive to offer consistent responses to clients, ensuring a shared and unified experience. By utilizing Gmail templates in conjunction with our help desk automation software your team can provide clients with an enhanced support experience.

This section of the manual covers:

- [The Benefits of Gmail Templates](#)
- [Step-by-Step: Enable, Create, & Save Email Templates in Gmail](#)
- [Step-by-Step: Search & Open Pre-Saved Templates in Gmail With Company](#)
- [Step-by-Step: Share Pre-Saved Templates](#)
- [Implement Best Practices: Improve Your Team's Gmail Templates](#)

## The Benefits of Gmail Templates

Gmail templates are pre-saved written emails that can be quickly inserted and sent to a recipient. After opening a Gmail template, these templates can be edited or sent as is. Email templates can help:

### Reduce Composition Time

Many organizations use effective email templates to create quick responses, as team members can easily insert templates into emails instead of writing original messages from scratch. The sender can adjust the contents as necessary after opening the template, however, this will

reduce overall composition time. Similarly, templates can help with frequently asked questions requiring lengthy instructions.

## Guarantee Brand Consistency and Tone

Templates help keep teams unified when delivering information. When conveying a message, it's essential to ensure a consistent tone. Suppose each technician responds to a common email inquiry with a slightly different answer each time. That can compromise your brand consistency and put your company at risk of losing clientele or profit. Templates help guide team members to employ uniform and consistent information, preventing errors and ensuring messages are conveyed in the intended tone.

## Encourage Team Collaboration


When administrators create templates and share them with their teams, it creates opportunities for employees to organize their responses to clients and customers more efficiently. While Gmail alone may not offer the ability to share email templates automatically, our software offers a robust solution for teams small or large to share templates between individuals or groups.

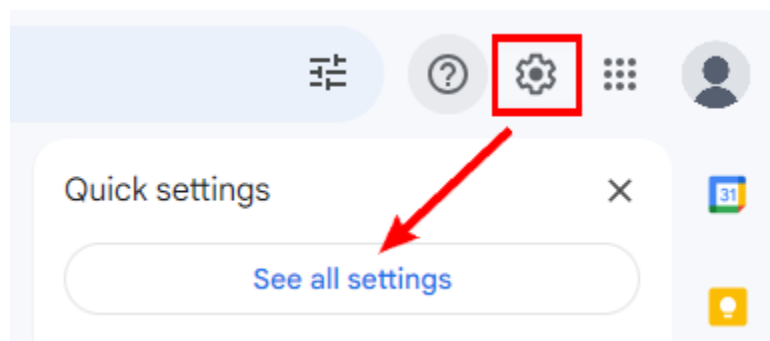
**\*\*Note:** Jump to see our [section on sharing pre-saved templates](#) for a step-by-step walkthrough.

## Step-by-Step: Enable, Create, & Save Email Templates in Gmail

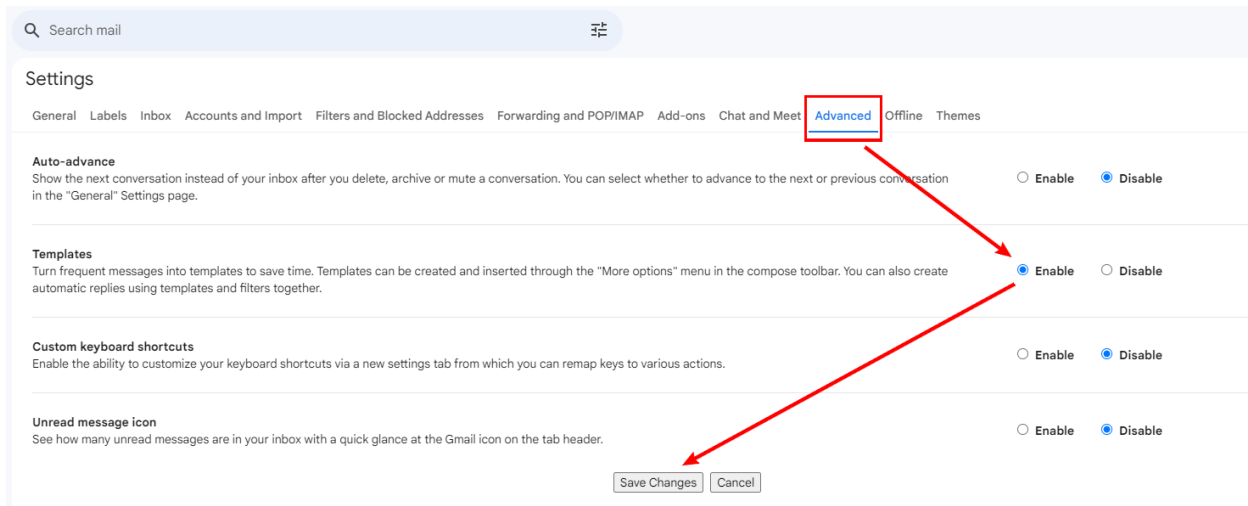
### Step 1: Enable Templates

If you have not done so already, you need to enable templates in the settings on your Gmail account.

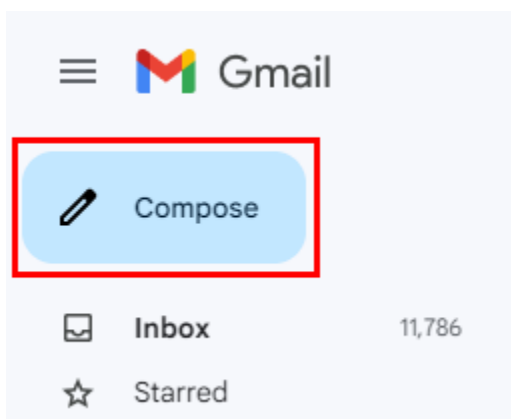
- In the top right-hand corner, select the **Settings icon**  that will then toggle down a list of choices.
- Under '**Quick settings**', select '**See all settings**'.



- Below the header 'Settings', placed in the top middle of the screen, there are tabs.
- Select '**Advanced**'.
- The second setting in the list will be labeled '**Templates**'.
- Select '**Enable**' and **save changes**.



## Step 2: Compose New Email

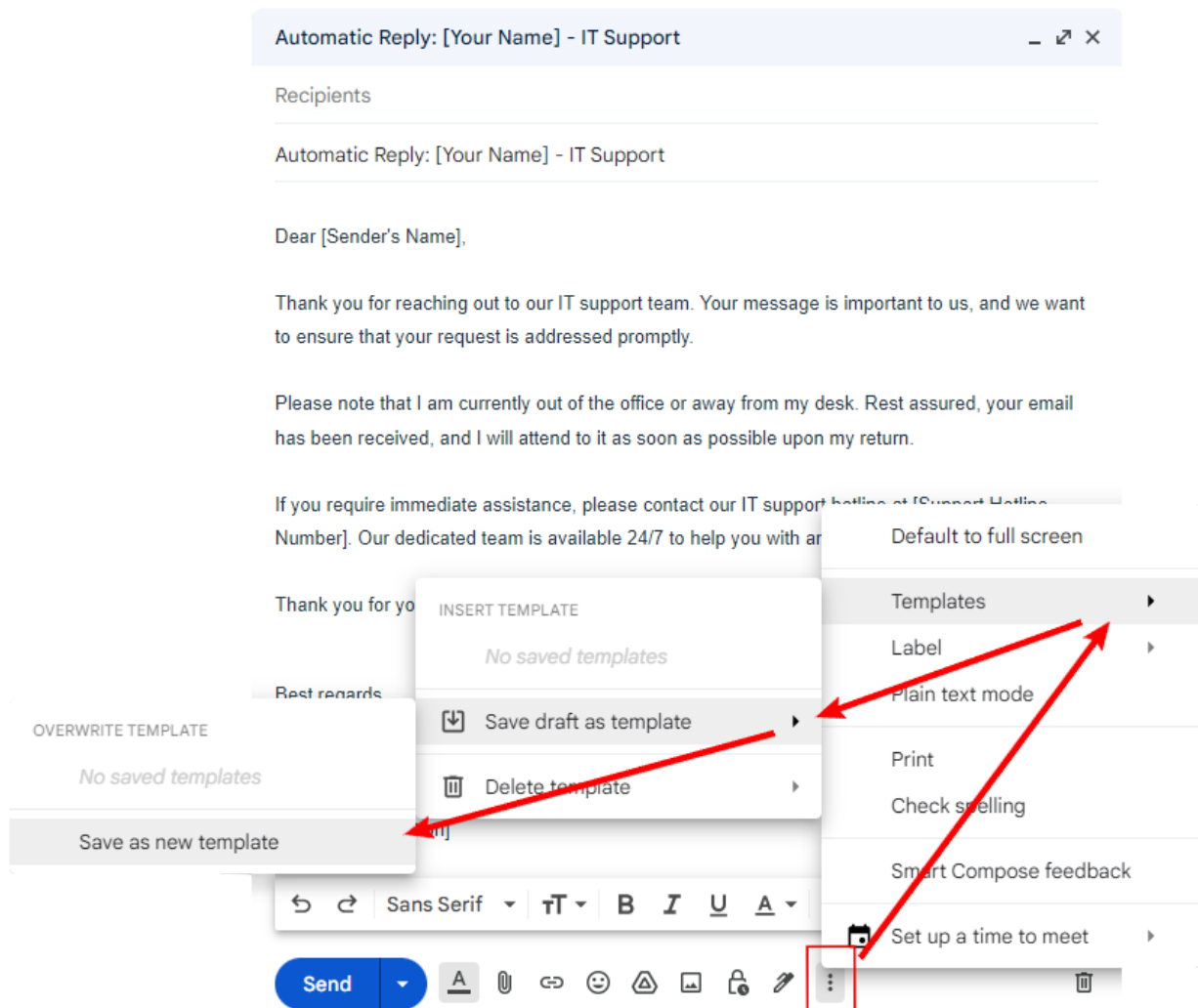


To create a template, you will need to select '**Compose**' in the top-left corner of your screen under the Gmail logo. The box in which you will compose your new email will pop up in the bottom right corner of the screen.

## Step 3: Draft Your Template

Now that you have the new email open, **compose your message**. This message will show up as your composed message when the template is used.

## Step 4: Save Your Template



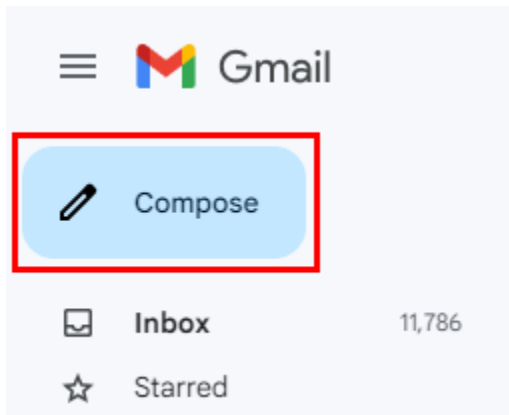
- Whether your email is full-sized or in a pop-up at the bottom of the box, there will be a blue 'send' button in the bottom left corner.
- To the right of the 'send' button, there are a few icons present. Select the icon showing **three vertical dots**.
- Hover your mouse over the second option from the top '**Templates**'. This will open another pop-up showing all your previously saved templates.
- Hover your mouse over '**Save draft as template**'. This will open another pop-up giving you the option to save the template over previous versions or save it as a separate template.

- If you want to save it over another template, select the name you want to save it as under '**Overwrite template**'. If you want to save it as a new template, select '**Save as new template**'.

**\*\*Note:** Hovering over 'Templates' will also provide the option for you to insert your saved templates for future reference. See how to [Search & Open Pre-Saved Templates in Gmail with Company](#) for step-by-step instructions.


## Step-by-Step: Search & Open Pre-Saved Templates in Gmail With **Company**

### Step 1: Compose New Email



To load any pre-saved template, you will need to select '**Compose**' in the top-left corner of your screen under the Gmail logo. The box in which you will compose your new email will pop up in the bottom right corner of the screen.

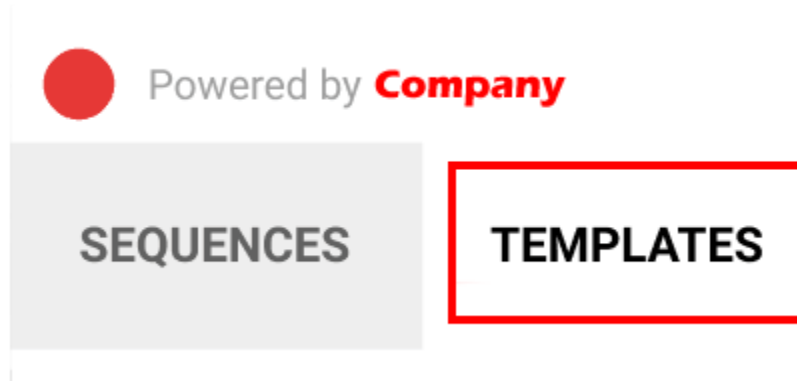
### Step 2: Select the "Insert Template" Icon

- In the bottom left corner of the email composition box is the "Send" button.
- To the right of the send button are your Gmail toolbar icons. For more information about Gmail's default toolbar icons, refer to [Google's Help Center](#) for more information.
- Select the Insert **Template icon** 
- A pop-up powered by **Company** will generate above the toolbar.

### Step 3: Select Templates Tab

- At the top of the pop-up, right below "**Powered by Company**" there are two tabs.


- The “**Sequences**” tab is on the left and the “**Templates**” tab is on the right.
  - If the “**Templates**” tab is white, leave it alone and continue to step 4.
  - If the “**Templates**” tab is greyed out, select the tab.

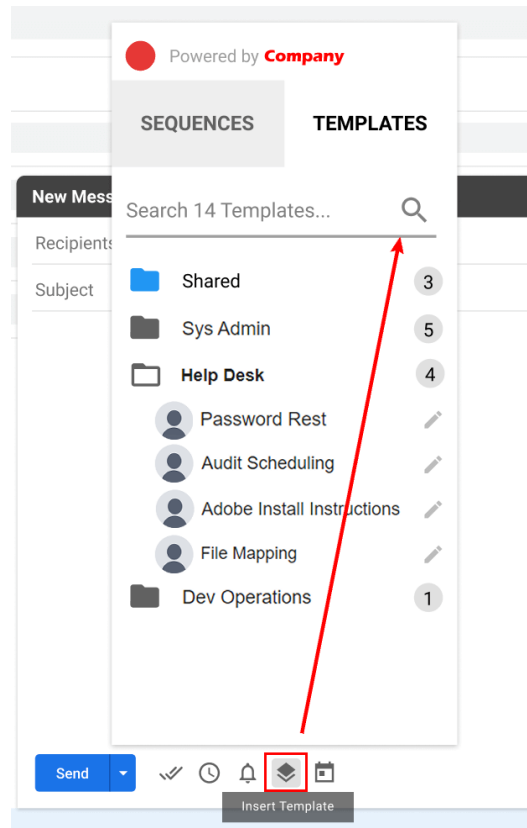


- Proceed to search for your pre-saved template using one of the two methods mentioned below.

#### **Step 4 (Option 1):** Search & Insert Pre-Saved Template in Search Bar

- Below the “**Templates**” tab there is a **search bar**.
- Begin typing in the name of the pre-saved template you are looking to insert.
- As you type, pre-saved templates matching the searched name will generate below.
- Select the template you want to insert.

**\*\*Note:** From here you can also select to edit the template by selecting the **edit icon** 



#### Step 4 (Option 2): Search & Insert Pre-Saved Template in Folders

- Under the search bar on the “**Templates**” tab are folders and files of your pre-saved templates.
- To search for a pre-saved template, open the folder in which it was saved and select the name of the file. If the file wasn't saved in a folder it will be at the bottom of your folders.

**\*\*Note:** From here you can also select to edit the template by selecting the **edit icon** 

## Implement Best Practices: Improve Your Team's Gmail Templates

Maximizing organization and productivity is effortless with the use of templates in an advanced Gmail workspace fueled by our powerful automation tools. While the instructions above lay out basic steps for creating, saving, and searching templates in Gmail powered alongside our tools, there are a few best practices that can be implemented to enhance your team's utilization of Gmail templates.

## Titles

When naming your templates, keep the titles short and precise. For example, “New Hire Welcome” or “Signature.” If your team members are looking through a list of templates with long or confusing titles, selecting the right one can be time-consuming, even with a search bar.

Here are some examples of good and bad template titles:

✓ Username Setup	✗ Template that details the instructions for self-service username setup
✓ Password Reset	✗ P@ssw0rd Re\$e+
✓ Welcome Sheet	✗ Notes
✓ User Unsubscribed	✗ Template743
✓ Sales Pitch	✗ T_89a3h42
✓ Terms and Conditions	✗ terms and conditions

Upon reviewing the list, consider the following insights to distinguish effective template titles from less optimal ones.

- Showcase what the template entails in a short phrase
  - If another user does not understand the details of the template from the name, it should be renamed.
- Keep the titles within a 25-character range
  - **\*\*Note:** Our Gmail extension only shows the first 25 characters of each template title in the pop-up list for selection.
- Implementing a naming convention will help optimize time when searching for templates
- Avoid special characters.
  - **\*\*Note:** Our desktop ticketing application gives special characters a special meaning. If a template utilizes a special character, it is likely our ticketing system will not be able to find it when searched for.
- Use title case capitalization to help users search at a glance.

## Personalization

Branded emails and customization are possible within Gmail; however, taking advantage of external resources can help you personalize templates even further. After all, customers and clients prefer emails that are personalized.

**Company**'s email collaboration tool for Gmail offers advanced features for creating email templates. HTML templates with a source code editor create variable placements for inserts

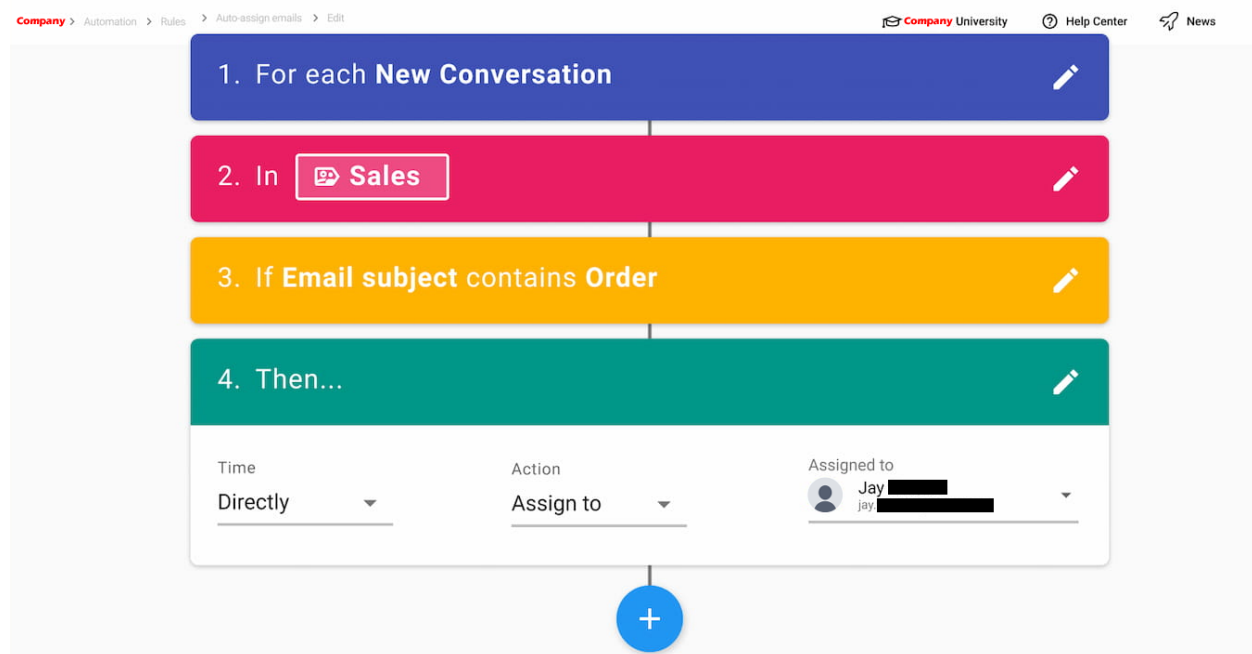


before sending. Furthermore, the use of variables can include recipients' names or the recipient's business name. These variables allow you to personalize emails in one click.

For guidance on establishing personalization with our HTML code editor tool, refer to [section 13](#) of this manual for a detailed, step-by-step walkthrough.

## Automation

Implementing automation into your daily workflow is the best way to enhance your team's email experience. Setting automation rules within Gmail improves company response times, helps team members adhere to service level agreements (SLAs), and ensures brand consistency without all the grunt work.



- To send a template in an automated response, you will need to set a **filter**.
- Once your filter is set, advanced settings will display further options. In step 4, you will be prompted to select an **“action”**.
- Here is where you will select **“send template”**.
- An extra step asking you to **“select template”** will generate to the right of your selected action.
- Search for the template you want to use as part of your automated response.
- Select the template.

For an extensive walkthrough of how to set a filter and use our email workflow automation toolset, refer to [section 15](#) of this manual.