PRO INTERACT™

Admin Console

Introduction

This support information serves as an introduction to the ProInteract™ Admin console for Email Templates in Content Management

Please note that every module in the admin console is role and permission specific.

Indicators

The following indicators are used throughout this ProInteract™ Admin console support material:

Package Type Legend
INTERACT Lite
INTERACT Regular
INTERACT Advanced
INTERACT Custom

Licence Package Information: Availability of features corresponds to the product package that has been purchased by your organization. This manual describes all compatible features for each of the product packages.

To the left is the legend shown throughout this manual for any feature not available to all packages.

TIP
Text with this icon informs you about useful tips while performing various operations.

DO YOU KNOW?
Text with this gives you additional information about the current topic.

CAUTION
Text with this icon cautions you about the consequence of an action which cannot be undone.

IMPORTANT
Text with this icon informs you about important information of procedures to follow.

Working with Library – Email Templates

**Packages:** INTERACT Custom | INTERACT Advanced

Email templates can be of two different types: Content share email templates and Custom Email templates.

Content share templates are created by the administrator and are not available for customization. These email templates constitute the content for the email when an asset is shared by the sales rep.

Custom Email templates can be accessed in the 'Inbox' feature on the mobile application and are available for customization by the sales rep.

To know more information on the Library types, Content types and Library rules, please refer to the help section Content management: Library Management
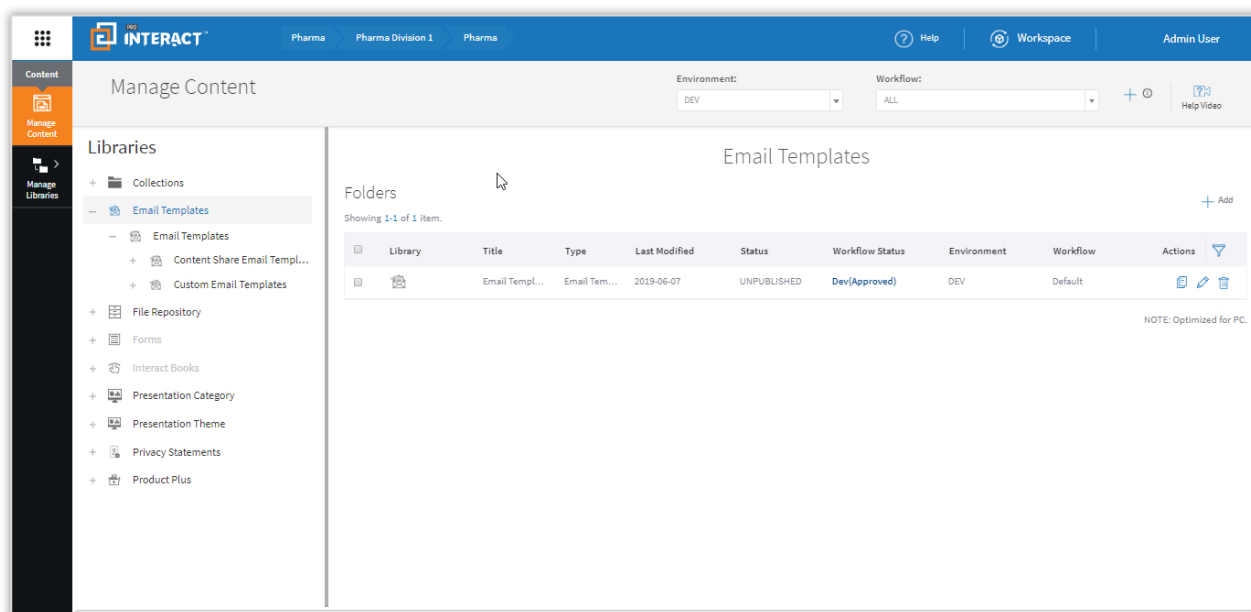

| Library Type	Default File type(extension)
Email Templates	WYSIWYG

1. To begin with, start by defining rules for the Library 'Email Templates'.

2. Once the hierarchy has been defined, go to Manage Libraries to start adding Folders and Files under 'Email Templates'.

3. Go to the Libraries pane on the Manage Content screen. Refer to the tree structure in the below diagram where 'Email Templates' is the library, 'Content share email templates' and 'Custom email templates' are the folders associated with this library.
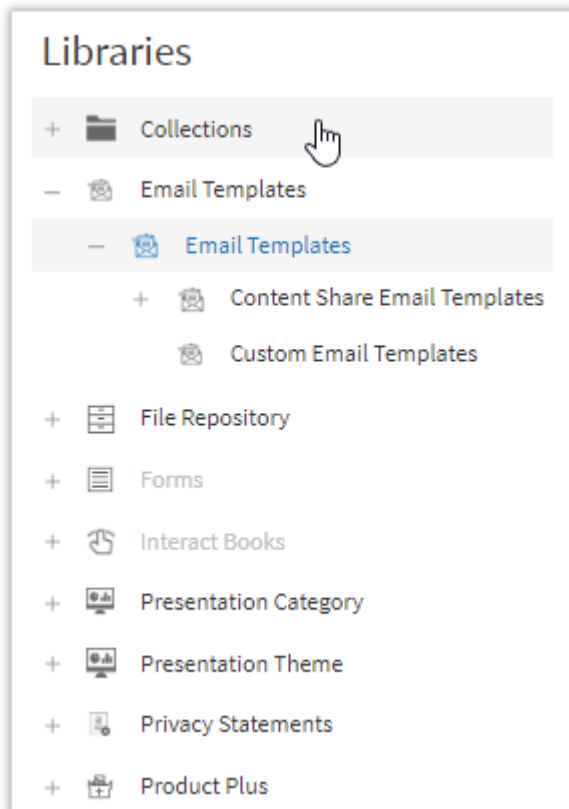
4. Once these types have been mapped to the 'Email Template' library, start uploading desired statements from the 'Manage Content' screen.

5. Go to 'Manage Content'

6. Select 'Email Template' Library and create a folder to store all your templates which can be of types Content share or Custom templates.
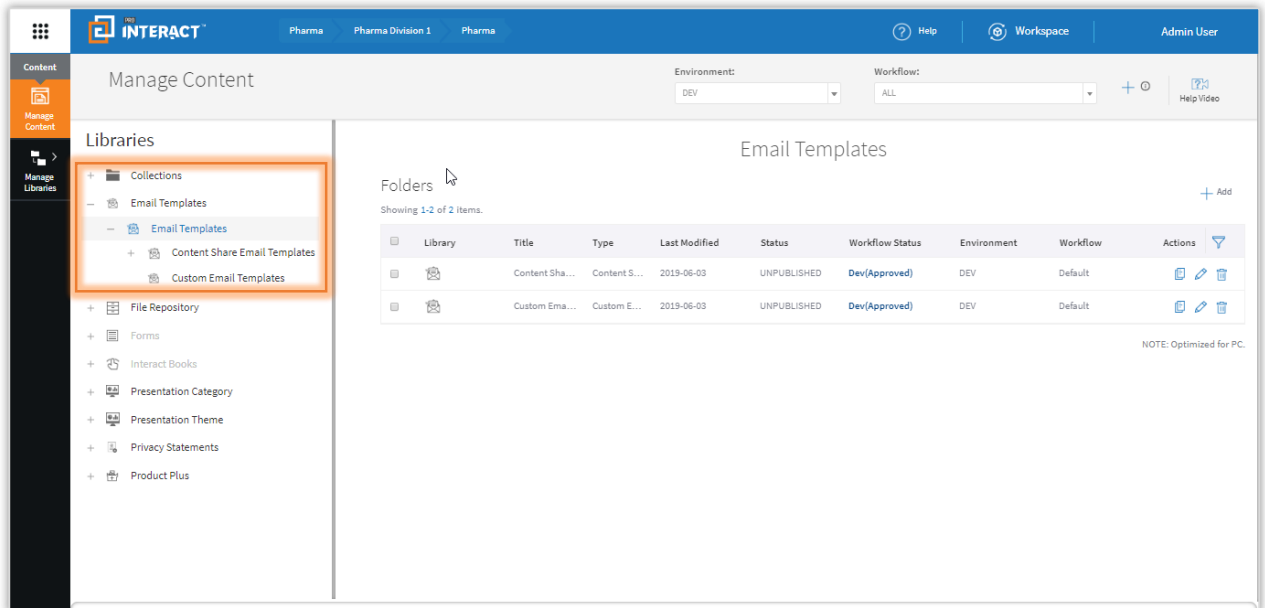
7. Click on the 'Add' button to start creating desired statements under the folder.

8. Enter desired content in the editor and other mandatory fields.
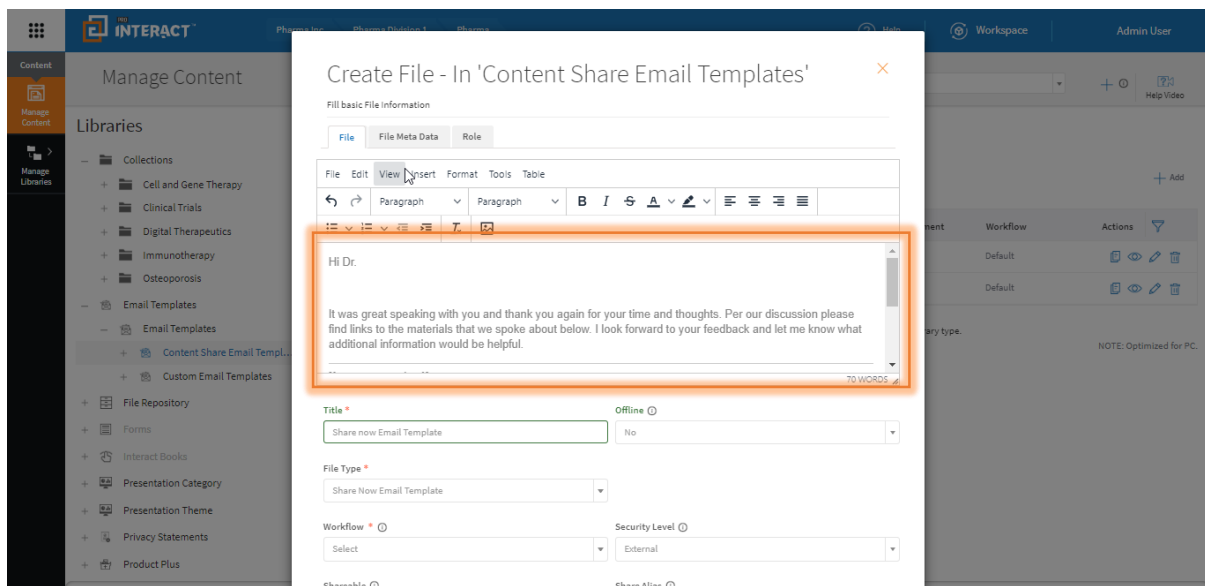
DO YOU KNOW?

As with other Libraries, an Email template must be in a 'Published' state and must be promoted to the Production environment for the Sales Rep/end user to have access to it.