How to copy a template to a different brand

Patricia Hegeman - 2024-06-27 - Comments (0) - E-mails, Templates, Pages, SMS

It is possible to copy an email template from brand A to brand B through a campaign.

You can do this as follows:

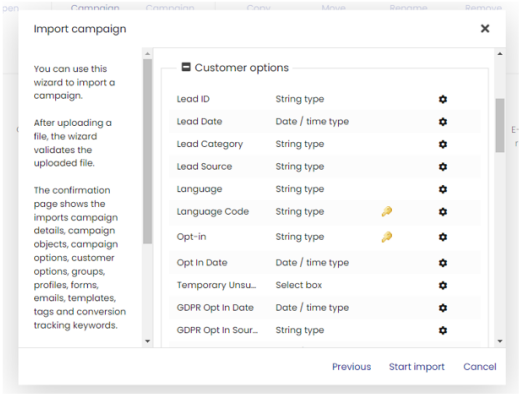
1. Create an email based on the template you want to use in the brand where the template is available.
2. Place this email in a ‘send email’-object in a new campaign.
3. Save the campaign.
4. Export the campaign via Campaign Export.
5. Go to the target brand.
6. Go to campaigns and click on Campaign Import.
7. Follow the steps of the import wizard.

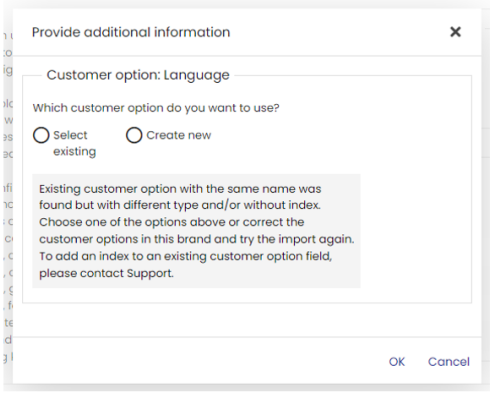
When importing the campaign, there are a few things to consider to ensure it works correctly.

Customer Option Fields

When you copy a template, all created (customer) option fields will also be copied. These likely do not yet exist in the target brand. In the import wizard, you need to specify for each customer option field whether it should be copied to an existing customer option field in the target brand or if a new customer option field should be created.

If you choose to select an existing field, Deployteq will suggest a potentially suitable field based on the name, type, and index of existing customer option fields in the target brand, but you still need to confirm which field it should definitively be.





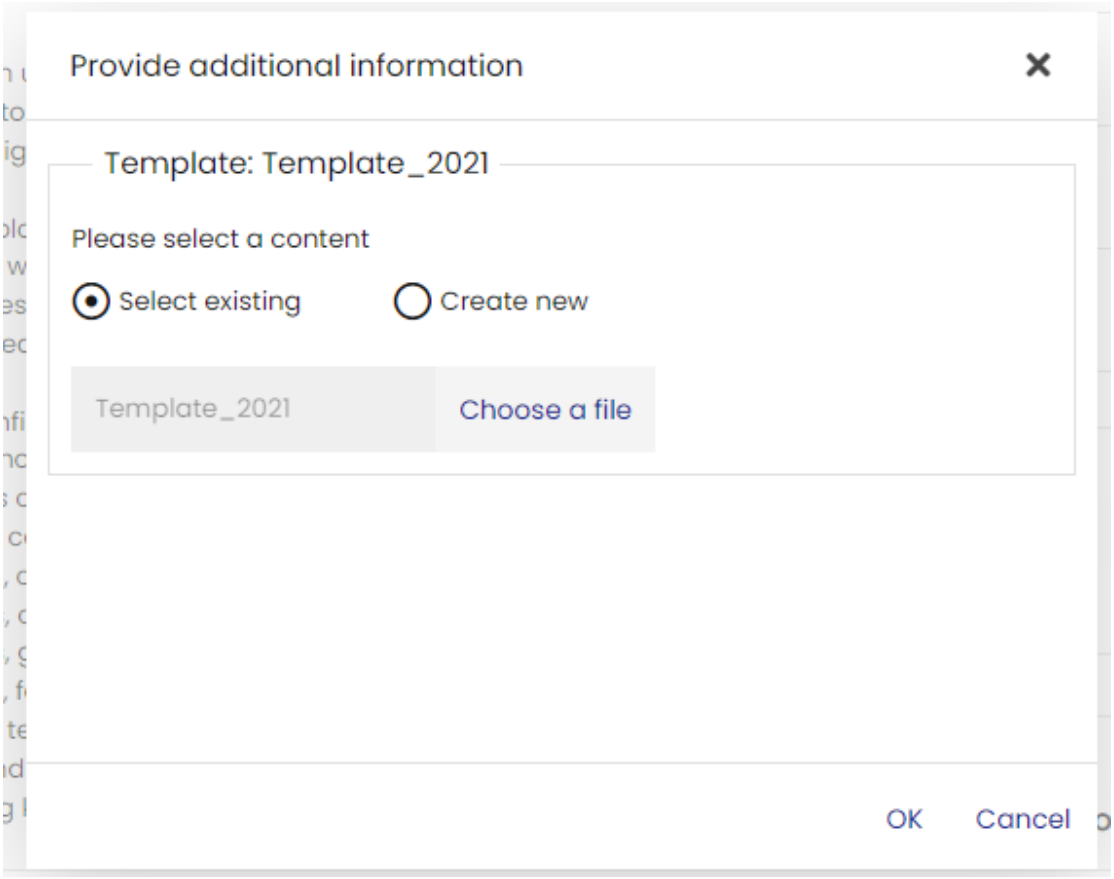
If you choose to create a new customer option field, be aware that you may exceed the maximum number of customer option fields. The error message you receive will indicate this.

It is also possible that you have already reached the maximum number of indexed fields in your target brand.

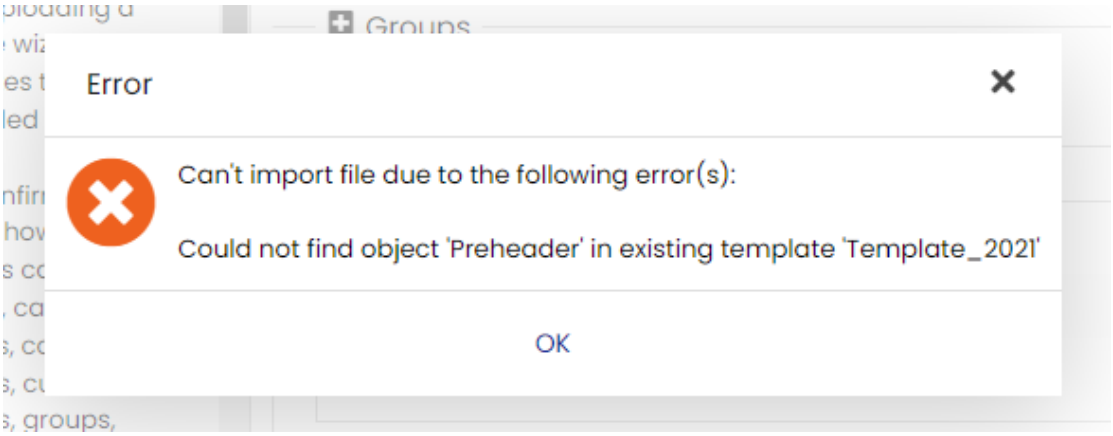
In this case, you can first request an expansion of the number of customer option fields or indexed fields from our Support Desk, and then reattempt the import.

Template

Regarding the template, you have the option to choose an existing template or to create a new template in the target brand. If you choose an existing template, you can then select the file in the file manager. Ensure that the template you select must 100% match the template from the source brand, otherwise, you will encounter problems later.



If you choose to use an existing template in your target brand, but the selected template does not match the template in the source brand in terms of objects, you will receive an error message:



In this case, select a template that does 100% match the template from your source brand and try the import again.

If you choose to create a new template, be aware that this can lead to a proliferation of templates in your target

brand over time. It then becomes difficult to define which template is the correct one when you want to make adjustments to your template.