Organize Legacy Templates With Template Categories

This article applies to:

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Legacy Notice: This article refers to a feature that used with legacy broadcast emails which are created in Marketing > Templates.

As you build your automated follow-up processes in Max Classic, the number of templates you create is going to grow. Use template categories to organize templates and to filter the template list.

- 1. Go to Marketing > Settings in the main navigation menu
- 2. Click on Template Defaults in the settings menu.



3. Max Classic has a set of default template categories. You can use these categories or create new categories.

- Delete the categories you won't use by highlighting the text, and pressing delete on your keyboard. Remove the blank space on the list as well.
- Add company-specific categories to the list. Type in one per line.
- 4. Click Save to apply any changes.
- 5. To assign a template to a category, go to Marketing > Templates
- 6. Click on a template name to open it.
- 7. Click on the Category & Follow-Up Sequence tab.

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Manage Email Template (back to search results)
General Categories & Follow-up Sequence Misc Expenses
Template Options
Title: campaign test

8. Select one or more category. Hold down the CTRL key on your keyboard to select more than one.

Template Categories	
Family Work Double Opt-In Emails	
New Lead Long-Term Norture	
Broadcasts	

- 9. Click **Save** to update the template.
- 10. To filter the Template Library List by Category...
 - 1. Go to Marketing > Templates
 - 2. Select a category from the category drop-down.
- 11. The list of templates will update dynamically to show the templates that are assigned to the category you selected.