

## Email Templates

<https://campus.barracuda.com/doc/76939374/>

Email templates help you to convey the message of your campaign. The body of the message can contain graphics, personalized messages, and links to your landing page, educational pages, or simulation pages. You can also choose to add an attachment to your email, enticing users to click on an attached file that looks legitimate.

This article describes how to work with email templates in the Email Template Manager.

For information on working with training templates specifically, refer to [Training Content](#).


To edit an existing email template:

1. Navigate to **Campaigns > Email Templates**.

If you already imported an email template into a campaign, as described in [Creating and Generating an Email Campaign](#), you can go to that campaign and access the email template from there.

Use the filter in the left navigation pane to locate templates for specific categories, like Training Announcements or Ransomware.

To use the filter, select your criteria, then click **Apply**. The matching templates display in the Content Center page.

2. Locate the desired email template and click the Edit button . In the **Content Action** dialog, click one of the following buttons:
  - **Edit** to work with the content of the email template.
  - **Copy and Edit** to create a clone of the email template to edit, so you are not altering the original.

The following options are also available, but do not open the email template editor:

- **Copy and Add to My Recent Campaign** to add a clone of the email template to your recent campaign.
  - **Add to My Recent Campaign** to add this specific template to your recent campaign.
3. Enter the following information:

### General Settings



- **Email Template Name** – Enter a familiar, unique name for this template.
- **Description** – Optional. Enter text to describe the email template.
- **Category** – Optional. This value is filled in automatically if you are using an existing template. You can change the value if you choose.
- **Active** – Select to enable this email template to be used in campaigns.

If you clear the **Active** check box, the email template will not be available to be used in campaigns. If the campaign is in **Design** mode and you deactivate the email template, you will not be able to **Generate** the campaign.

- **Ignore Spam Score** – Select to send the email template regardless of its Spam Score. If

the Spam Score, shown below the message editor and described in that section below, is too high, it will be too obvious to users, so you would not want to send it as part of a campaign.

### Message

- **Sender Name** – Enter a friendly name for the sender of the email, not the literal email address.
- **Subject** – Enter the subject line for the email to be sent.
- **Message** – Use the WYSIWYG editor or click the **Source** button to create or edit your template.
  - Click the Image button  to add images from the Security Awareness Training [Image Gallery](#), or your own images, to the email template.
  - Use the **Template** button  to include "mail merge"-type fields to personalize your email message with details from the Address Book, making it appear more legitimate to the user. For more information, see [Template Items](#).
  - Add links within the email to take users to the landing page for the campaign or other predefined simulation or training pages.

In the **Links** dialog, all entries, besides **Landing Page** and **Unsubscribe**, are links to [Training Content](#).

When adding links to your email template, it is best to specify sites hosted by Security Awareness Training to maximize tracking and reporting. Security Awareness Training cannot track or report on clicks to sites hosted by others.

**Spam Score** – Note the Spam Score of your email template and the comments associated with it. The Spam Score is based on several components that make the email appear to be more like spam. If the spam score is too high, the system will not send it, because it looks too much like spam. Use the comments to edit your email message to lower your spam score. Refer to the **Ignore Spam Score** check box and description above.

### Attachments

- **Enable Inline Images** – Select to enable images to be embedded within the email, rather than linked.
- **Insert** – Click to add a model (mock) attachment to your email, which might entice users to click on it. Attachments can look like executable files, PDFs, PowerPoint presentations, and other files. Refer to the list of available attachments below.
- **Smart Attachments** – Click to view attachments you have already added to this email template. You can also add a new attachment here.

Click **New**. The **Smart Attachment Manager** displays. Select the **Smart Model** on which to base your attachment, then click **Save** to specify additional settings. Settings vary depending on the model file you select.
- **Custom File Name** – Enter a name for your model attachment. Include the file extension and make sure it matches the model file type.
- **Custom Text** – Enter text to display when the user opens the attachment.
- **Custom Image** – Click **Browse** to select an image to display when the user opens the attachment. For more information, refer to [Image Gallery](#).

- **File Type** – The type of file (Excel, PowerPoint, etc.) on which your model file is based.
  - **Digitally Signed** – Indicates whether the model file is digitally signed, making it appear to the user to be more trustworthy
  - **Model File** – Displays the title and file type you specified above.
  - **Model Mime Type** – Displays the Mime type for the file you specified.
  - **Model File Size** – Displays the size, in KBs, of the model file you specified.
  - **Last Updated** – Displays the timestamp for the last time you updated the file.
4. Click **Save**, then click **Return to the Email Template Manager**.
  5. Click **Save**.
  6. To include this email template in your most recent campaign. click **Add to My Recent Campaign**.

#### Available Attachments

The following are types of Smart Attachments that are available for you to add to your email template. Adding a model attachment can make your email appear to be more authentic to the user. Note that these are not actual attachments.

- **Executable** – Recommended for use in portable media campaigns, where a file named `setup.exe` or `install.exe` is expected to be delivered on a thumb drive or CD. Most email filters will remove executable attachments by default.
- **HTML - w/Load Content Button** – Displays a web page with instructions that the user must click a button to view the content.
- **HTML - w/Meta Tags for Immediate Redirect** – Redirects users to a page where they can learn more about attacks.
- **PDF - Full Page - Clickable** – Displays a PDF file with instructions that the user must click a button to view the content.
- **PDF - Secure Full Page - Clickable** – Displays a PDF file with instructions that the user must click a link to view secure content.
- **PowerPoint - Replaceable Text and Image** – Displays a PowerPoint document that you can customize for your users.
- **Word - IP and User Name** – Displays a Word document that you can customize for your users. This attachment captures the local IP address of the user interacting with the file. In addition, if the user interacting with the file is on a Windows computer, this attachment also captures their user name.
- **Word - without Macro** – Displays a Word document you can customize for your users.
- **Word - Admin Only** – Displays a Word document you can customize for your users. If the user interacting with the file is on a Windows computer, this attachment also captures details about whether the user has local admin privileges on the machine they are using.
- **Word - IP Only** – Displays a Word document that you can customize for your users. This attachment captures the local IP address of the user interacting with the file.
- **Word - IP User Name and Admin** – Displays a Word document you can customize for your users. This attachment captures the local IP address of the user interacting with the file. In addition, if the user interacting with the file is on a Windows computer, this attachment also captures their user name and details about their local admin privileges on the machine they are using.

- **Word - Replaceable Text and Image** - Displays a Word document you can customize for your users.
- **Word - w/Load Content Button** - Displays a Word document with instructions that the user must click a button to view the content.
- **XLS - Budget** - Displays an Excel spreadsheet designed to look like a budget.
- **XLS - w/Load Content Button** - Displays an Excel spreadsheet with instructions that the user must click a button to view the content.
- **XLS - Wire Transfer** - Displays an Excel spreadsheet with links the user can click to approve or deny a wire transfer.
- **XLSM - includes Macro - Replaceable Text and Image<sup>†</sup>** - Displays an Excel document, including macros, you can customize for your users. See section on passwords below.
- **XLSX - without Macro - Replaceable Text and Image<sup>†</sup>** - Displays an Excel document you can customize for your users. See section on passwords below.

### Password-Protected Attachments

Passwords are available for attachment types listed above with the <sup>†</sup> symbol.

You can send an attachment and include its password within the campaign email. You can then track which employees use the password to open the attachment - an unsafe behavior. Note that these passwords are only used to open the mock attachment for the campaign. These passwords do not actually protect any sensitive information, so it is safe to include them in the campaign email. Refer to [Template Items](#) for information on the template field for passwords.

## Figures

1. editButtonGreen.png
2. image.png
3. templates.png

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