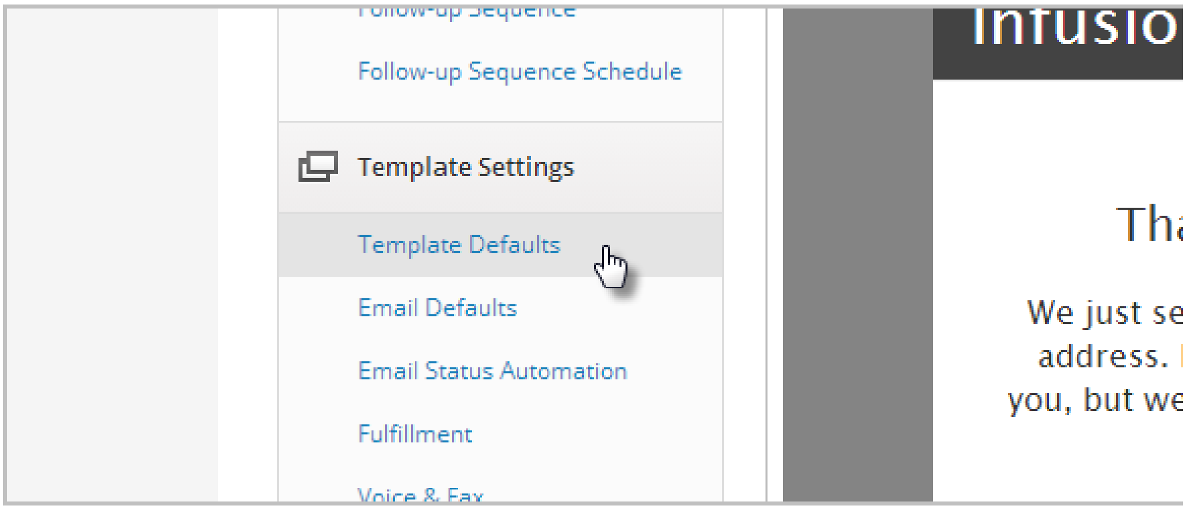
Organize Legacy Templates With Template Categories

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

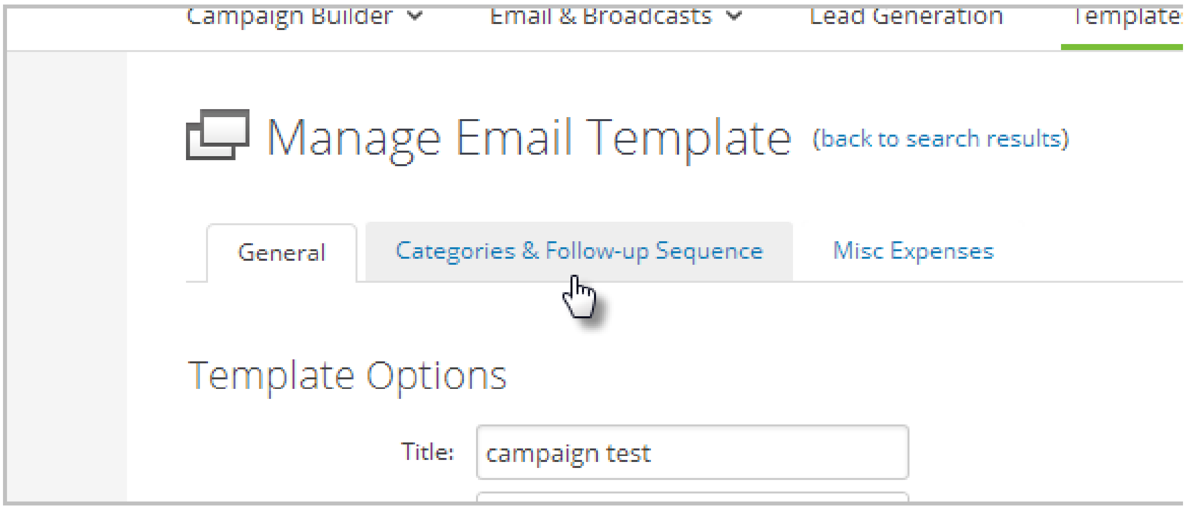
As you build your automated follow-up processes in Infusionsoft, the number of templates you create is going to grow. Use template categories to organize templates and to filter the template list.

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

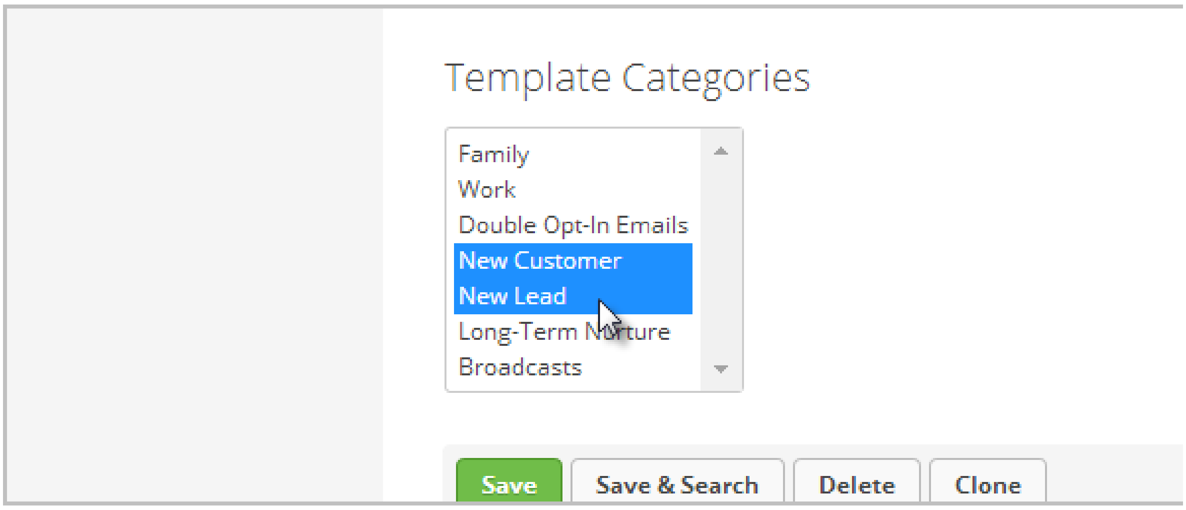


3. Infusionsoft has a set of default template categories. You can use these categories or create new categories.
    - Delete the categories you won't use by highlighting the text, and pressing delete on your keyboard. Remove the blank space on the list as well.
    - Add company-specific categories 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.



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



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.