Email Templates

1.0 Creating Email Templates in CRM

The following guide outlines the steps on how to create email templates in Microsoft Dynamics CRM. It will involve the use of Microsoft Word or Outlook so that you can format the text to be included.

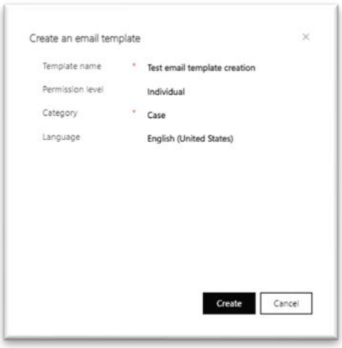
1.1 Creating Email Templates

Steps:

1. Open ***Microsoft Word*** and select a **New > Blank Document**
2. Type out the email response that you want i.e., *your greeting, email body.*
3. Once you have completed this, make sure that you format the text, check spelling, etc.

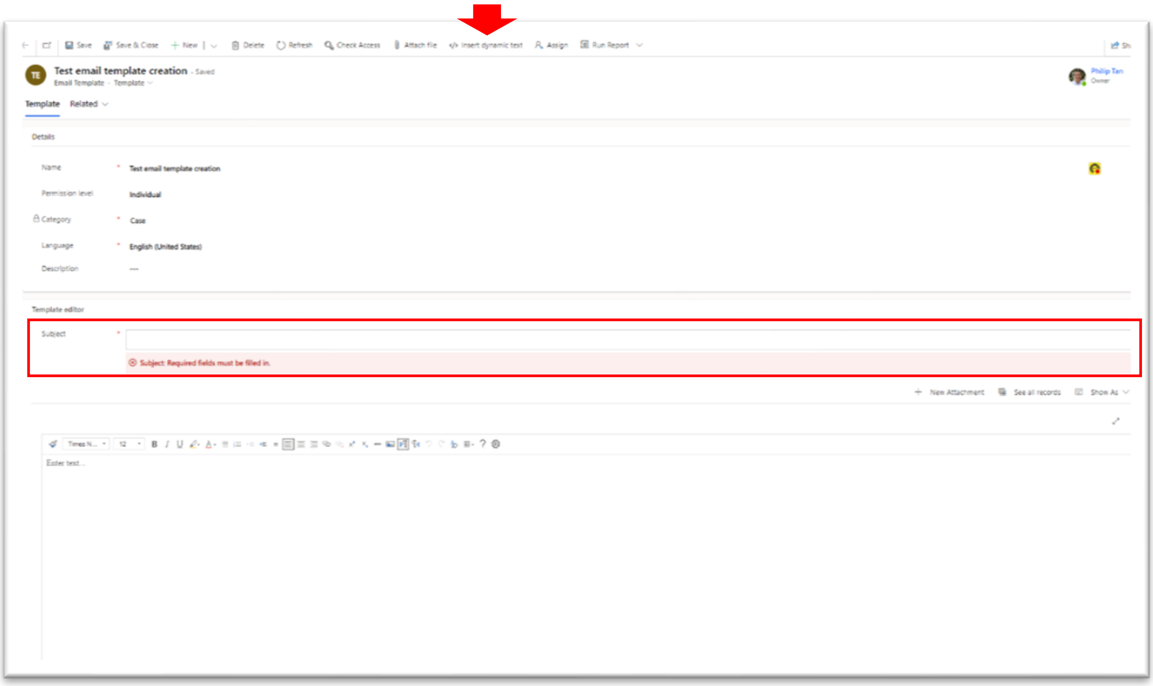
In **Microsoft CRM**,

1. Select Email Templates in the Site Nav menu.
2. Click on **+ New**.
    a. Fill out the following fields:
    b. **Template Name:** (use the acronym of your area e.g., WIL at the start of the name so that it's easier to find)
    c. **Permission level** (Choice of Organisation or **Individual**): *Leave this as Individual otherwise it will clog up the template library.*
    d. **Category**: (Choice would depend on what the template is for e.g., Use **Case** for replying to cases, etc.)
    e. **Language**: English (United States) *This is defaulted and cannot be changed.*

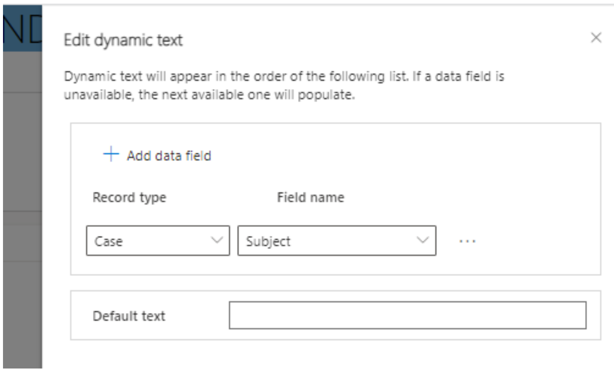


3. Click **Create.**

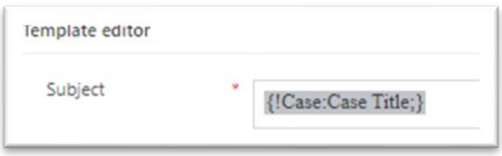
4. Your screen should now look like this.



5. You can now add a **Description** to this template if you desire.
6. If you want to insert Dynamic text in the **Subject** field, click in the field first, then click on **</> insert dynamic text**. (see Red Arrow in the diagram above)
7. In the Edit Dynamic Text window:



8. Record Type: select **Case** and **Case Title** for the field Name.
9. Your case Subject should now look like this :



Note: what this means is that the subject will extract the case title automatically for you.

10. In the Main body text, copy and paste the text that you have created in word (see previous step)

Dear ,

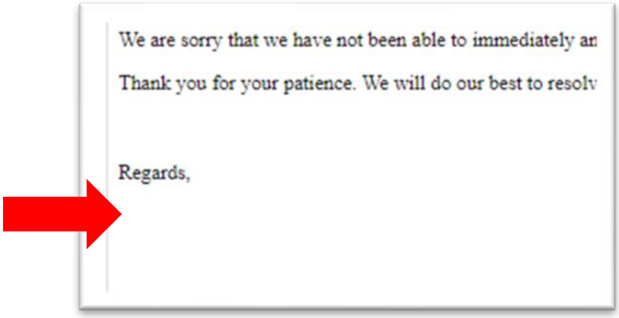
We are sorry that we have not been able to immediately answer your request. We have reassigned your case to , who will assist you further.

Thank you for your patience. We will do our best to resolve your case in a timely manner.

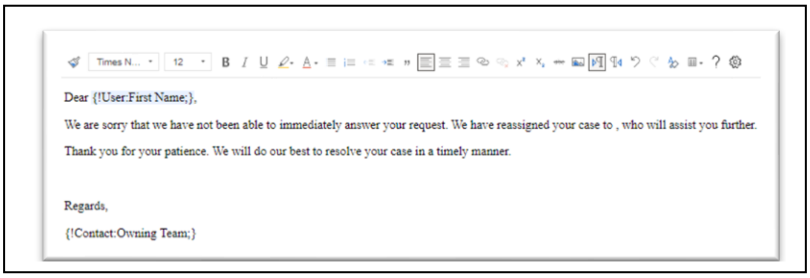
11. You'll notice that the text does not have any dynamic text as yet.
12. In the area that you'd like to insert Dynamic text to, click on that location then **</> insert dynamic text**.
13. Select **User** for record type.
14. Select **First Name** for the Field Name
15. Add any punctuation after.

Dear {!User:First Name;},

16. If you need to attach a signature to the email, you can do that as well.



17. Click in the area where you'd like to insert the text.
18. Click on **</> insert dynamic text.**
19. For Record Type: select **Contact**.
20. Field Name: ***Select Owning Team***
21. Click **Insert**.
22. You should now have something looking like this:

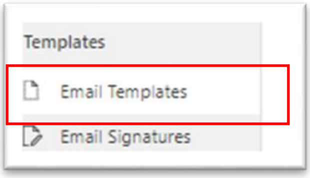


23. If you are happy with the template, click on **Save & Close**.

1.2 Sharing Templates

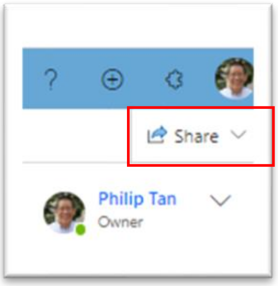
Once you have created your template, you can share them with your organisation, team or colleagues.

1. In the Nav menu
2. Click on Email Templates

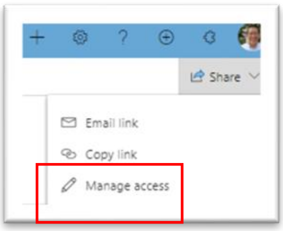


3. Your screen should default to "**All Email Templates**". You can search through the list but these are mainly templates created that are viewable by 'Organisation'.
4. Click on the Chevron and select "**My Email Templates**" if it's one that you have created. This will filter out the view for you.
5. You will see a list of your templates.
6. Select the template that you wish to share.

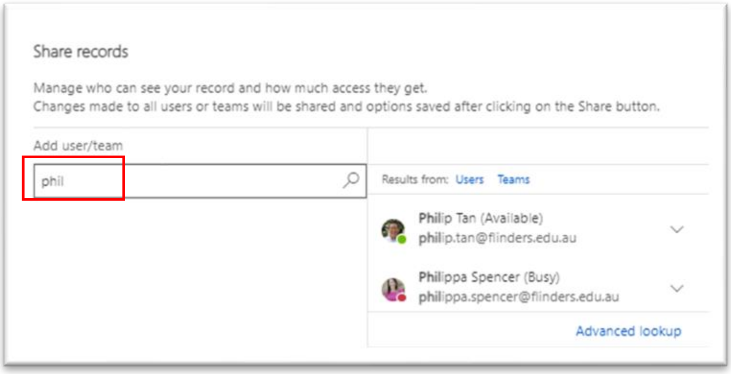
7. Once you have selected the template that you wish to share, click on **Share** (in the top right-hand corner).



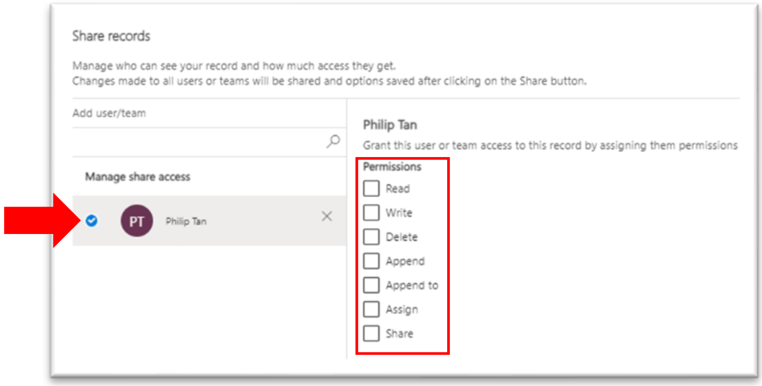
8. A pop-up window will appear. Select "**Manage access**"



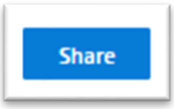
9. The Share records screen will show up. In the Add user/team field, type the name of the person or team that you want to share this to.



10. Once you have selected the person or team that you'd like to share the template with, you need to tick the **tick box** and select the type of permission level.



11. For most users, the recommendation is to allow read, assign, and share access but that is entirely up to you.
12. Click on **Share**.



13. You have now shared your template and the users or team will have access when they click on **Email Templates** in the Nav menu and select **My Email Templates**.