Email Templates

Microsoft Dynamics CRM email templates and the mail merge functionality are helpful tools for mass emails and mass mailers. These tools are typically used by marketing and sales groups. Mail merge and email merge allow you to pull CRM data, such as a person's name, into an email, letter or fax. Using the merge functionality allows you to personalize the message. There are four ways to select the recipients of the activity:

- From any view
- Pull an advanced find
- From a marketing campaign or quick campaign
- Automatically send the email by using a workflow

There are system email templates (public) and personal email templates (private). Email templates are typically associated with one record type.

Learn more about working with Microsoft Dynamics CRM email templates:

- o How to Create a Personal Email Template
- o How to Create a System Email Template
- o Constructing an Email Template
- o How to Use Email Templates
- o How to Send Direct Emails

How to Create a Personal Email Template

If you create a personal email template, you will be the only person who can see it and use it. Here's how to do it:
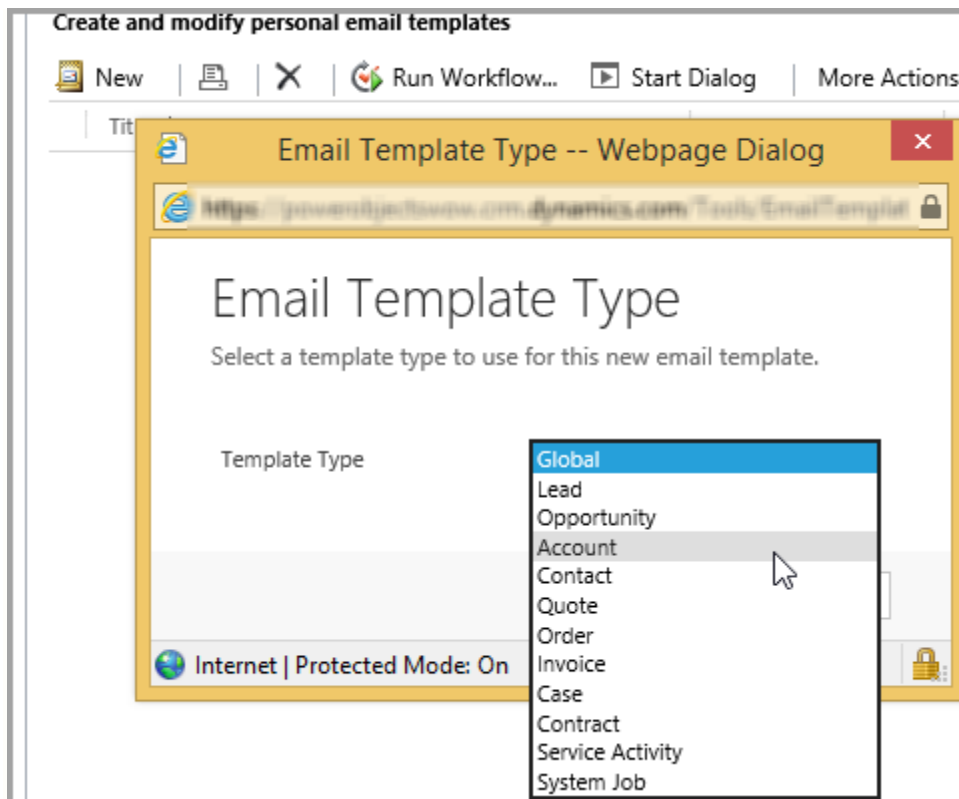
1. On the nav bar, on the top right select **Settings** and select **Options**. This will open a new window.
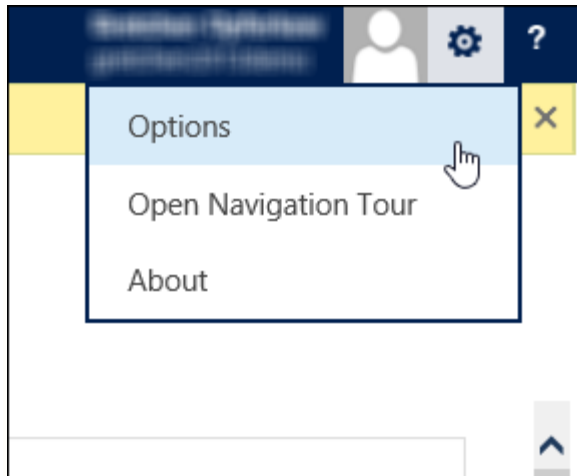
3. Within the new window, navigate to the **E-mail Templates** tab.

4. To create a new template, click **New**. A new window will pop open.
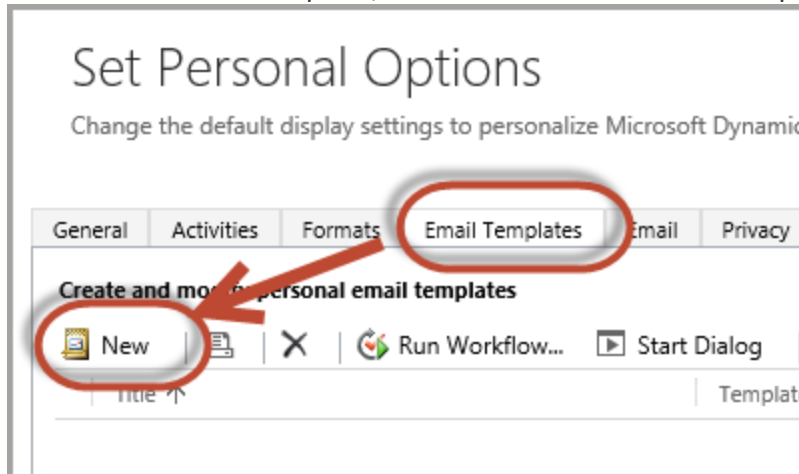
5. Select which record type you want to associate with the template. Global means that you will be able to do a merge from any type of record, but you will not be able to merge fields from the specific record.

Create and modify personal email templates

New | 🖨 | ✕ | 🔄 Run Workflow... | ▶ Start Dialog | More Actions

Email Template Type -- Webpage Dialog

Email Template Type

Select a template type to use for this new email template.

Template Type

| Global |
| Lead |
| Opportunity |
| Account |
| Contact |
| Quote |
| Order |
| Invoice |
| Case |
| Contract |
| Service Activity |
| System Job |

Internet | Protected Mode: On

7. Now you'll create the actual template using the instructions below for Constructing an Email Template

How to Create a System Email Template

Creating a system template will make it available to the whole organization. Here's how:

1. In the nav bar, go to the **Settings–>Templates**

2. To add a new template, select **New.** This will open a new window where you select the template type. This is the same process as when you create a personal template.
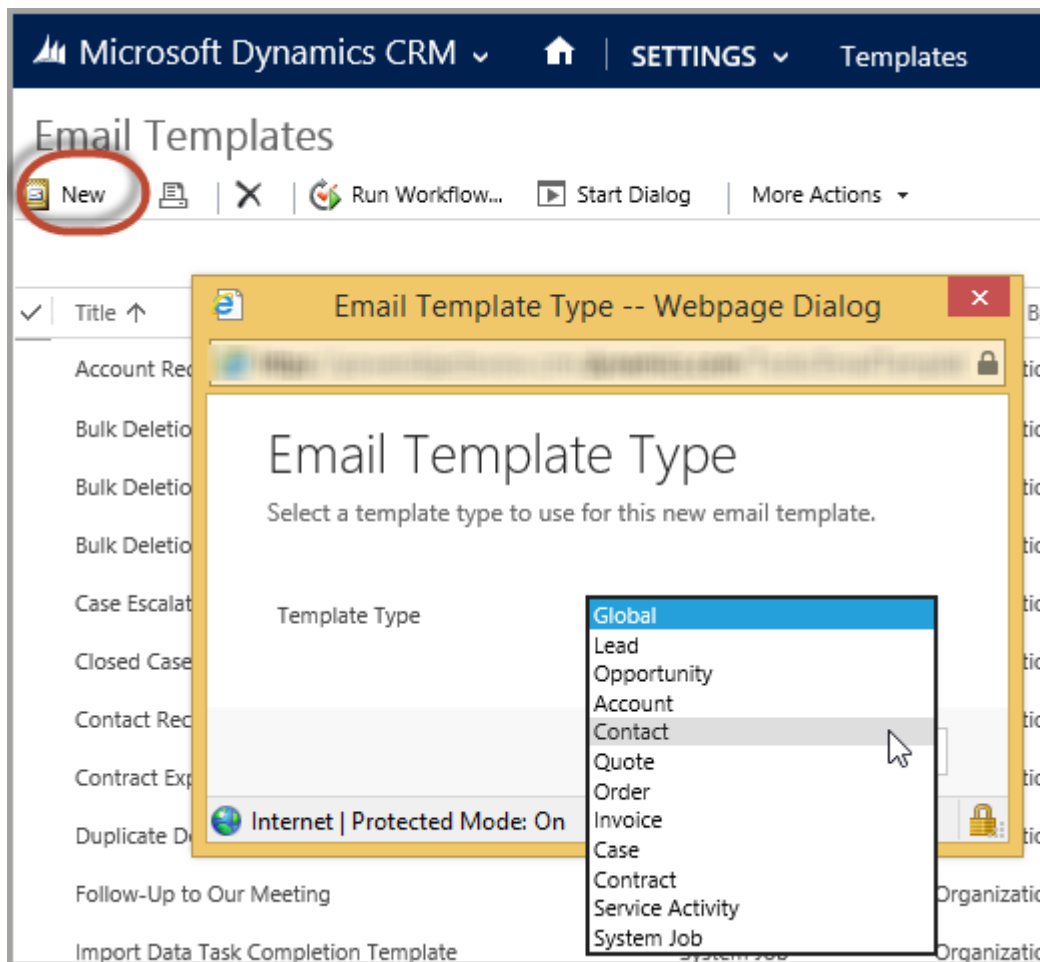
5. Use the drop down list to select the **Template Type.**

6. Click **OK** to start a new template.

Constructing an Email Template

Whether you are creating a personal template or a system template, the process for constructing a template is the same.

1. Enter a **title**, **description**, and **subject** for your email template. The title is the name of the template for internal use, and you can add a description so that other users know what it is used for. The subject is the subject line of the email, which will be seen by the recipient.

File Save and Close Insert/Update Delete Actions ▾

Email Template: Contact Reconnect

Details

Type *   📄 Contact Template   Language

Title *   Contact Reconnect

Description   Use this template to reopen the lines of communication with a customer y

Subject *   We haven't heard from you...

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Dear {!Contact:Full Name;Valued Customer},

We have not heard from you for a while. We wanted to check in and make sure that (s). We have asked {!Contact:Owner;a customer service representative} to contact are currently using and to give you details about our upcoming products.

Thank you.

2. To add a merge field, on the top of the window, click **Insert/Update**. A Data Field Values dialog box will open.

3. In the new window, Data Field Values, click **Add** to add more values to the list. Another new window will open, called **Add Data Value**.

View Email Template Merge Fields in CRM 2011

4. Select the value you want to include in the email and click **OK**.

5. When you are satisfied with your e-mail template, at the top of the screen, select **Save & Close**.

### How to Use Email Templates in a Campaign

You can use Email templates in a Campaign, Quick Campaign or to Send a Direct Email to multiple contacts.

Campaign Activities

1. First, you should create a **Campaign Activity** with the **Channel** of **E-mail.** (Learn more about creating campaign activities).
2. On the ribbon of the campaign activity record, click **Distribute Campaign Activity.** A new window called **New E-mails** will open.
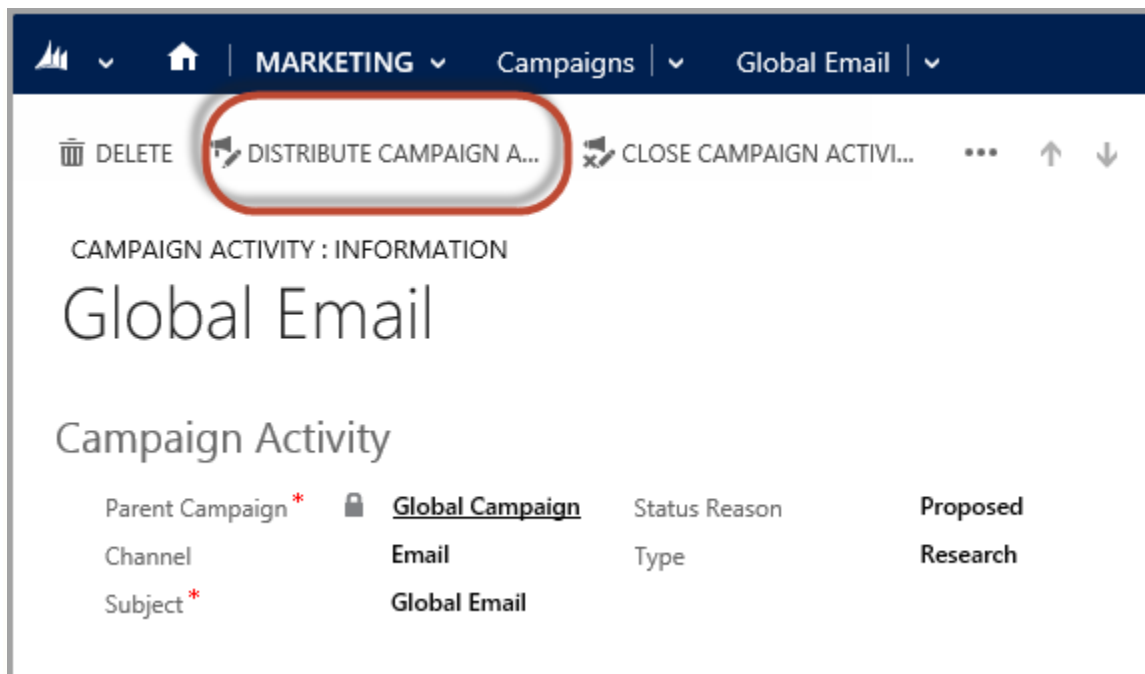
3. To add a template to the emails, check the **Use Template** check box.

4. Click the look up button, and the **Select Template** dialog window will open.

5. Select which template you would like to use.
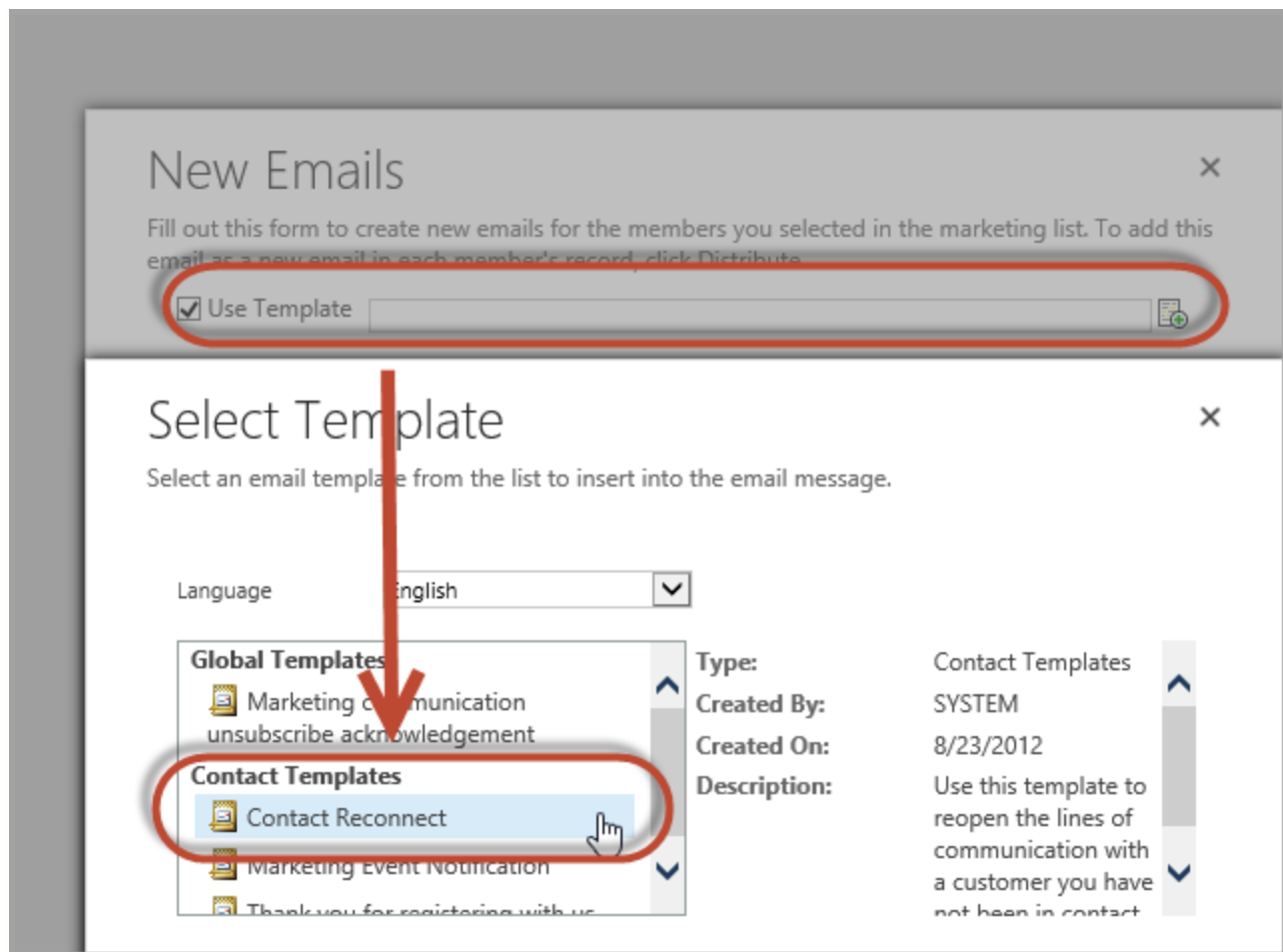
6. Click **OK** to return to the distribute process.

7. Fill out the remaining criteria before clicking **Distribute** to send the template.

How to Send Direct Emails

You can send direct emails and use an email template from any view or advanced find.

1.   Pull your advanced find.

2. On the ribbon, within the advanced find window, select **Send Direct Mail**. A new dialog window called **Send Direct E-mail** will open.

4. On this new window you can select the template that you want to use. There are also options for which contacts you want to email.

5. When you are ready to send the emails, click the **Send** button. **WARNING:** Clicking Send immediate sends the Emails