

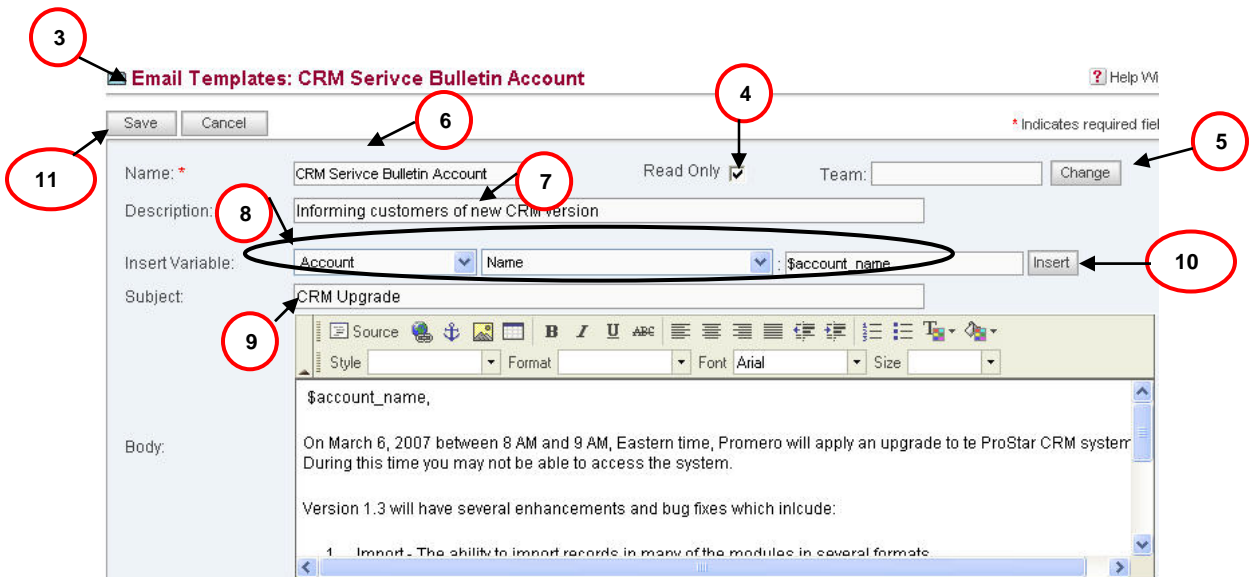
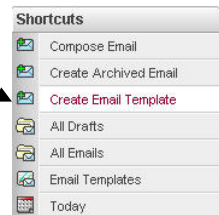
## CREATING AND USING PROSTAR CRM EMAIL TEMPLATES:

**Note:** You can create an email template against an Account or Contact;  
**BUT** not both.

### A. Creating an Email Template for an Account:

1. Click **Email** tab from Main CRM module window.
2. Click **Create Email Template** from Shortcuts menu.
3. The Email Templates Screen Displays.
4. **Select Read Only** if you do not want others modifying your template.
5. **Optional:** Click Change and select a team that this template will be assigned to.
6. **Enter a name** for your new template. Note that this is a required field.
7. **Enter a description** for your email template.
8. **Select the variables** you the email template to be based on:
  - a. **Select Account** from Drop Down
  - b. **Select Name** from Drop Down

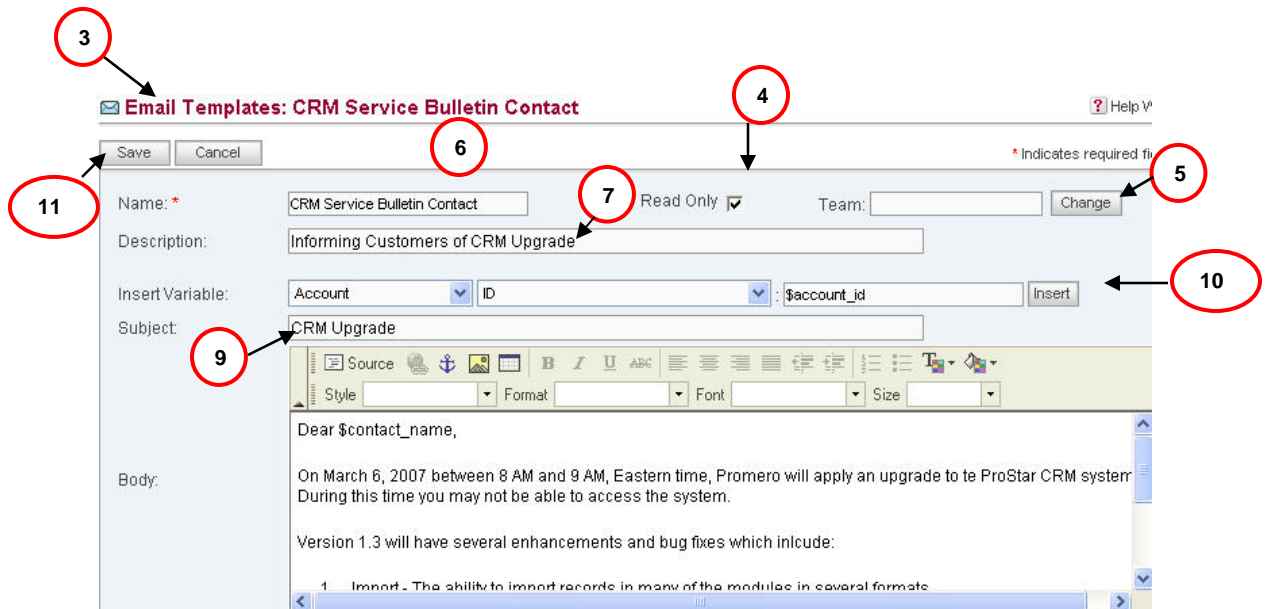
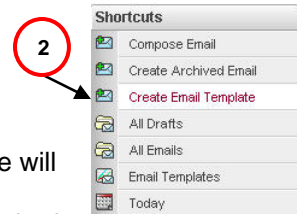
Notice account\_name populates to the left of the insert button.
9. **Enter a subject for your template.**
10. **Click Insert** (you **MUST** click insert to place the variable into the body of your template.  
**Optional:** Enter Dear or any salutation you desire in front of the \$account\_name. You can also add a comma afterwards. (Refer to below image.)
11. **Click Save**



**B. Creating an Email Template for a Contact:**

1. Click **Email** tab from Main CRM module window.
2. Click **Create Email Template** from Shortcuts menu.
3. The Email Templates Screen Displays.
4. **Select Read Only** if you do not want others modifying your template.
5. **Optional:** Click Change and select a team that this template will be assigned to.
6. **Enter a name** for your new template. Note that this is a required field.
7. **Enter a description** for your email template.
8. **Select the variables** you the email template to be based on:
  - a. **Select Contact** from Drop Down
  - b. **Select Name** from Drop Down

**Notice** contact\_name populates to the left of the insert button.
9. **Enter a subject for your template.**
10. Click **Insert** (you **MUST** click insert to place the variable into the body of your template. **Optional:** Enter Dear or any salutation you desire in front of the \$account\_name. You can also add a comma afterwards. (Refer to below image.)
11. Click **Save**



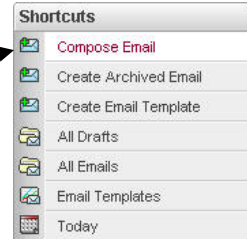
**c. Check Email Templates to see a listing of your templates:**

1. Click Email Templates from the Shortcuts menu (see below image)
2. A listing of email templates will display
3. Click on the template you wish to view, use or edit.

Email Templates List		
Name	Description	Last Modified
CRM Service Bulletin Account	Informing customers of new CRM version	03/14/2007
CRM Service Bulletin Contact	Informing Customers of CRM Upgrade	03/14/2007

### D. Composing an Email using your new Template

1. Click **Emails Tab** from CRM main Module window.
  2. Click **Compose Email** from Shortcuts menu.
  3. **Assigned to:** defaults to person composing the email. Click the down arrow to change assigned to name.
  4. **Enter a To email address.**
  5. **Optional:** Enter Cc: and Bcc:
  6. **Enter Subject.**
  7. **Select Template** from Use Template drop down menu.
- NOTE:** You **MUST select Use Template:** prior to selecting contact or account.

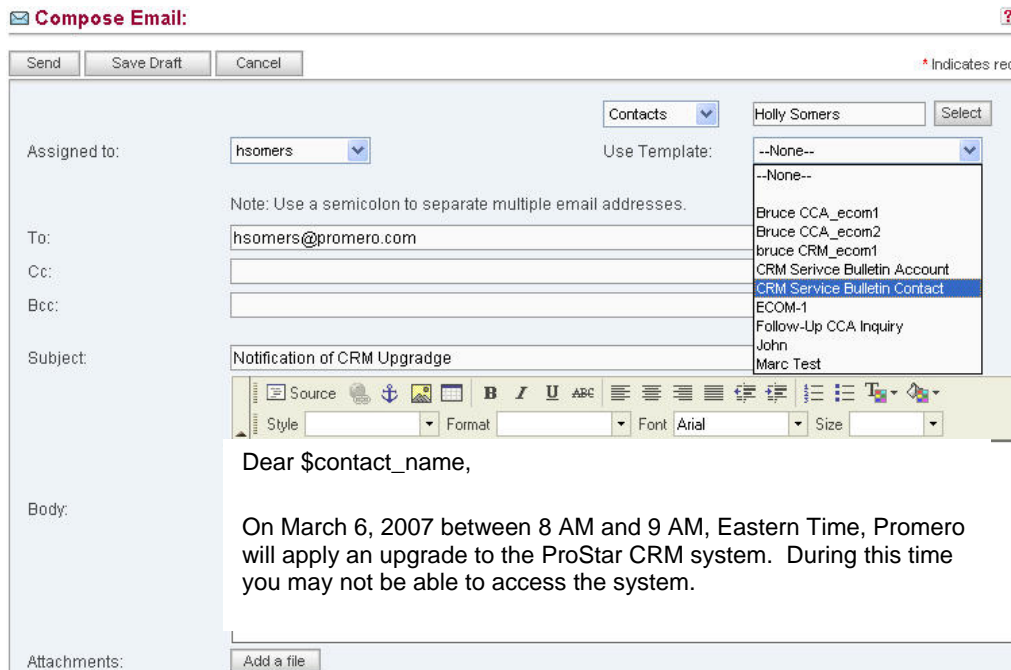


If you receive this error message, click OK. You will be returned to your compose email window.



Your text from your template, displays in the body of the email message.

8. Select Contacts or Accounts from drop down menu.
9. Select an Account or a Contact (click Select to perform a search on the account or contact name).
10. Use the format toolbar to change font, font size and color, add numbers or bullets, etc.
11. Optional: Click Add a File to attach a document, image, etc.
12. Click Send. (Can also Save as a Draft to send at a later time.)



The person receiving the email will see:

