CM Email Templates

This feature allows you to build an email template with prepopulated data to use in a mail merge to your Accounts/Contacts.

From the menu on the left-side of the screen, go to Contact Management > Email Templates.

Add Email Template

1. Enter the Template Name.
2. Enter your email message and select the fields you want to add to the message:
    - The Account Fields dropdown lists the document details, such as the Account Name, Address, Phone, Email, Notes, etc.
    - The Contact Fields dropdown lists the document details, such as the Contact Name, Address, Phone, Email, Notes, etc.
    - The User Fields dropdown lists the user details, such as Username, Email, and Phone Number.
    - If you wish to add the date to the message, use the Insert Date button at the bottom.
3. When finished, click the Save

To use your new email template, be sure to select it from the Template dropdown when you are using the Email feature.

Edit Email Template

To edit an Email Template, click the Template Name that you want to open at the bottom of the page.

When finished making your changes, be sure to click the Save button.

Delete Email Template

To delete an Email Template, click the delete button under the Delete column at the bottom of the page.