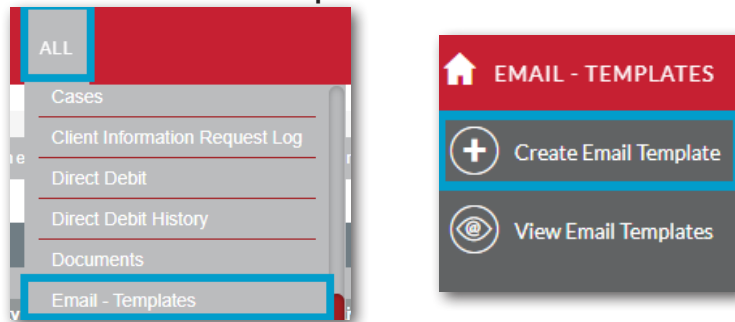


Visit [support.fibrecrm.com](https://support.fibrecrm.com) for more info or contact your CRM Manager

## Setting Up Email Templates

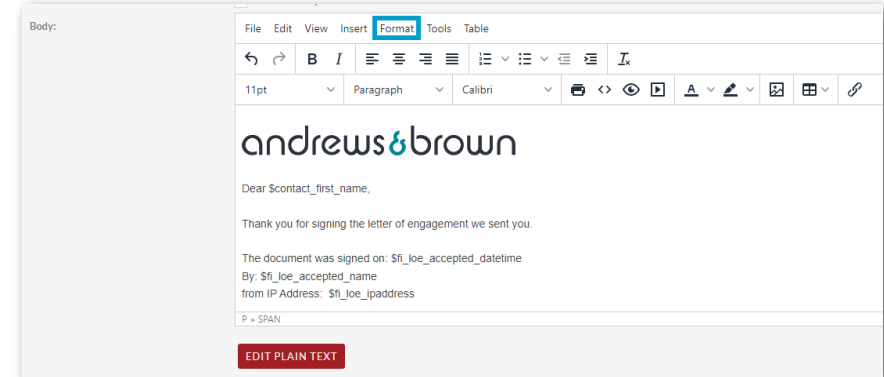
**1.** To manually add products go to **All** in the **Navigation Menu** and select **Email - Templates**. In **Email - Templates** select **Create Email Template**.



**2.** Enter a **Name** for the template. In **Type** select **Email** from the drop down menu. In the **Quick2Email Type** drop down you can select whether it related to **People/Organisations, Leads, Opportunities** or **Invoices**. You can also type in a **Subject**.

The image shows the 'Create Email Template' form. At the top are buttons for 'SAVE AND CLOSE', 'SAVE', and 'CANCEL'. The form includes fields for 'Name' (with a value 'Generic Email Template'), 'Assigned to' (with a value 'FibreCRM'), 'For Engagement Letter?' (checkbox), 'Description', 'Insert Variable' (with a dropdown showing 'AML Check History' and 'Name', and a text input for 'Name'), and 'Subject'. There are also dropdowns for 'Type' (set to 'Email') and 'Quick2Email Type' (set to 'Accounts/Contacts'). A red asterisk indicates required fields.

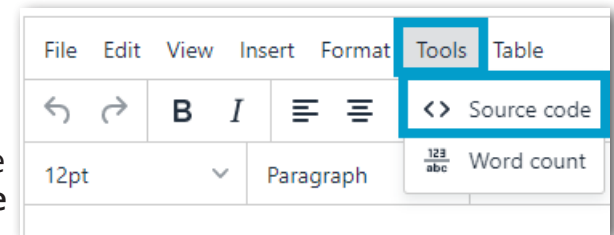
**3.** In the **Body** of the template, write your Email. You can format any text using the **Format** button. You can also insert images, URLs and insert tables.



**4.** You can add in **Merge Codes** to pull information from records in the CRM. In the **Insert Variable** section, you can create merge codes by selecting an option from the first and then the second dropdown menu. The code will then appear in the third field select **Insert** to add to the template.

The image shows the 'Insert Variable' section of the template editor. It has three dropdown menus: 'Person/Lead/Target' (selected), 'First Name' (selected), and '\$contact\_first\_name' (selected). A red 'INSERT' button is below the dropdowns.

**5.** You can view the **HTML** of the template. A basic knowledge in this will help you create more complex templates. To access the code go to **Tools** and select **Source Code**.



**6.** Once done click **Save & Close**. Your template will now be available to select as an **Email Template**.

Email Templates List

| Name                          | Type  | Description                      | User | Date Modified    | Date Created     |
|-------------------------------|-------|----------------------------------|------|------------------|------------------|
| new portal submitted          |       |                                  | Bob  | 27/10/2021 14:41 | 27/10/2021 14:27 |
| Professional Clearance Letter | Email |                                  | Bob  | 15/10/2021 13:28 | 15/10/2021 13:28 |
| Client Portal                 | Email | Client information request email | Bob  | 15/06/2021 13:46 | 15/06/2021 13:46 |