E-mails - Creating & Sending - Last updated May 25/06

To understand how to use CRM & E-mails you need to learn the difference between creating emails from within Outlook and from within the browser version of CRM. You also need to understand how templates are used to create emails and/or to insert signatures into your emails.

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CREATING E-MAILS

The first thing to consider is where you should create e-mails.

*** There are 3 types of e-mails that you can create when you have CRM Outlook client installed. Two of them can be created from within Outlook, and the third can be created in the browser version of CRM.**

The following chart describes the best location for sending e-mails:

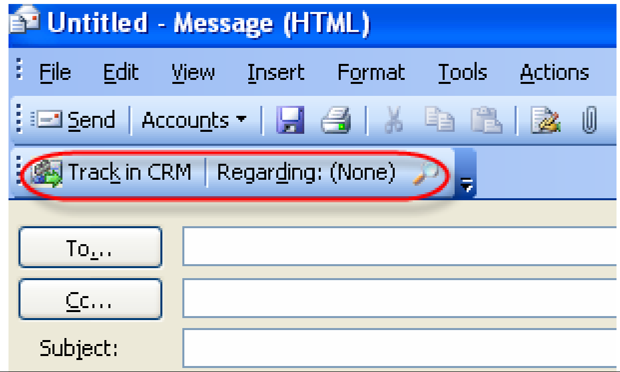
TYPE OF E-MAIL	METHOD TO USE TO SEND E-MAIL
Sending a personal e-mail that you don't want tracked in Outlook	Always send from Outlook
Sending a single e-mail from a sales or service rep to a customer	I would recommend doing this from Outlook since your signature is automatically inserted into the e-mail. Use the CRM toolbar in Outlook so that the e-mail is automatically tracked, and then you can also associate it to another entity (eg. Opportunity or case). It is also faster to attach files to e-mail in Outlook.
Sending a bulk e-mail to many customers	Always from CRM in the browser since you have the ability to select the customers (using filters) then selecting a signature (e-mail template) to send. You can then also send the e-mail on behalf of any CRM user.
Sending a knowledge base article to a client	Always from CRM in the browser since this is where you get the ability to attach knowledge base articles to e-mails.

The following chart details how to create the 3 different types of e-mails:

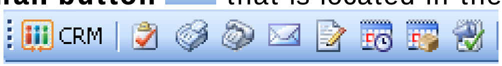
1) STANDARD E-MAIL IN OULOOK - e-mail is NOT saved in CRM

When you create an e-mail using the **Outlook e-mail create button** 

, you will open an e-mail screen like the picture on the right. You can create your e-mail and send it. Notice that the "Track in CRM" button has the same background colour as the e-mail (light blue), and that the "Regarding:" button has "None" after "Regarding". This means that the e-mail won't be saved in CRM in any way.

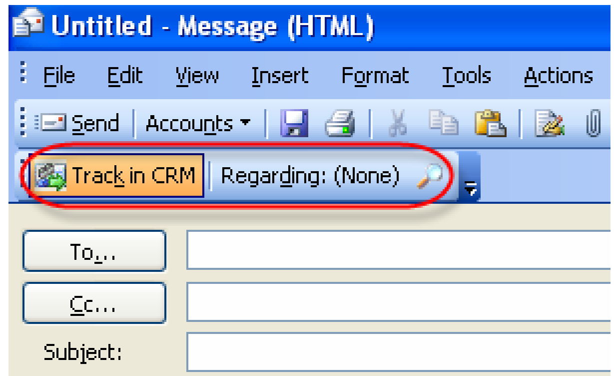


2) "CRM" E-MAIL IN OULOOK - E-mail is saved against the contact you are sending it to and it can also be saved against another entity (eg. Case or opportunity)

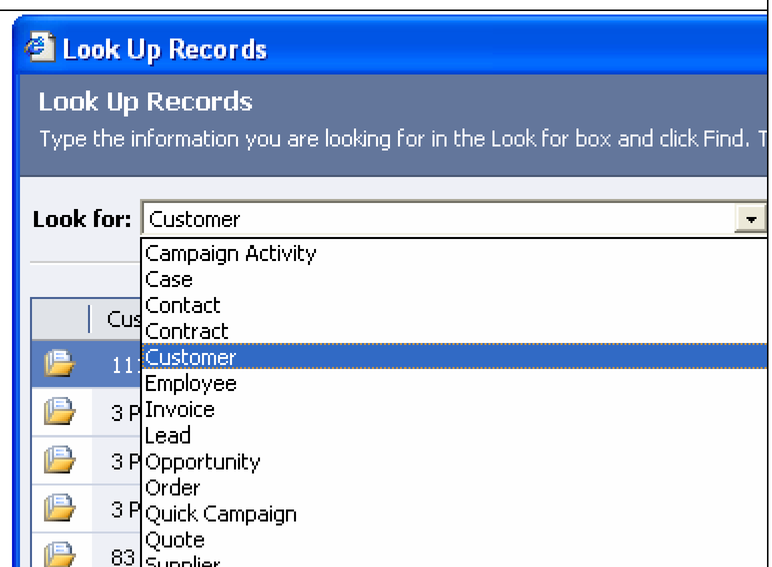
When you create an e-mail from within Outlook using the **CRM E-mail button**  that is located in the CRM Toolbar 

you will open an e-mail screen like the picture on the right. Notice that the "Track in CRM" button now has an orange background colour, and that the "Regarding:" button has "None" after "Regarding". This means that the e-mail will be be tracked in CRM against the person that you put in the "To..." box, but that it won't be saved anywhere else in CRM unless you click on the "Regarding" field as in the next row. When an e-mail is tracked in CRM the system inserts a "token" in the subject field as illustrated here:

Subject: Probability of the following Opportunity is 50% CRM:00160041



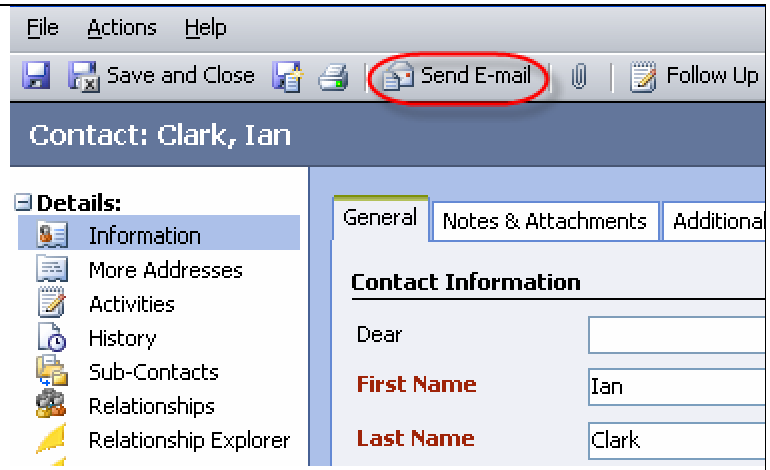
When you click on the "Regarding:(None)" button you will open a window that allows you to also save this e-mail in other entities in CRM (eg. Case or opportunity). The "Look for:" dropdown allows you to select an entity, then from the entity list you will select the "item" to save the e-mail against. When you create an e-mail from within Outlook it will use your Outlook signature

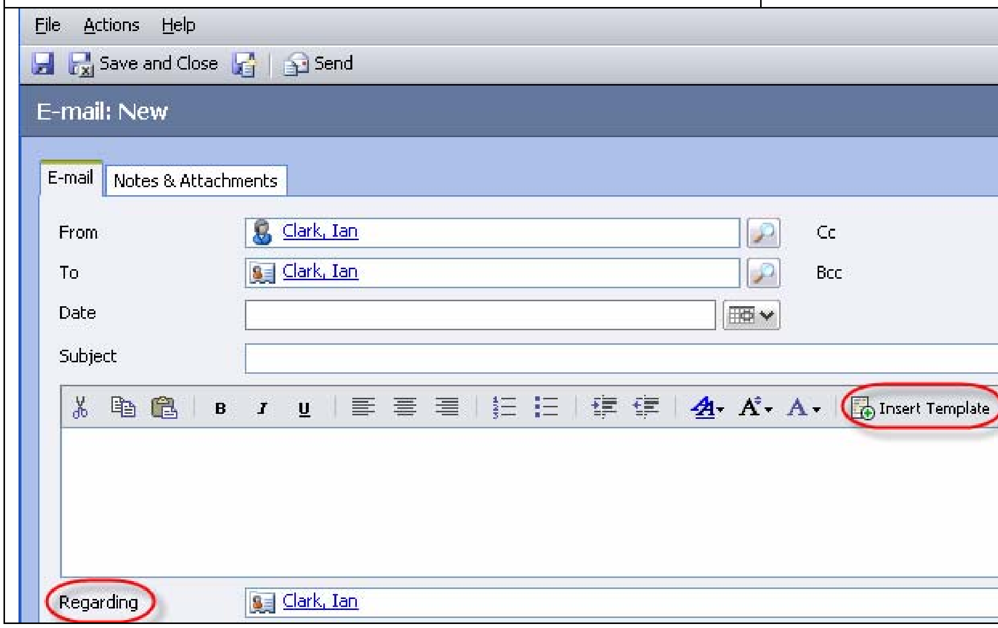


3) CRM E-MAIL FROM WITHIN THE BROWSER

When you create an e-mail from within a contact in CRM using the **Send E-mail** button 

that is located in the top navigation of a contact, as circled in the picture to the right, you will open an e-mail screen like the picture below. Since the e-mail was created from within CRM you do not have to click anything for it to be tracked. Notice that the "Track in CRM" button now has an orange background colour, and that the "Regarding:" button has "None" after "Regarding". This means that the e-mail will be be tracked in CRM against the person that you put in the "To…" box, but that it won't be saved anywhere else in CRM unless you click on the "Regarding" field as in the next row.



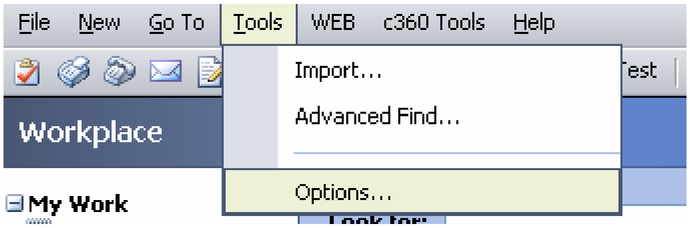


E-MAIL TEMPLATES - Personal & Global

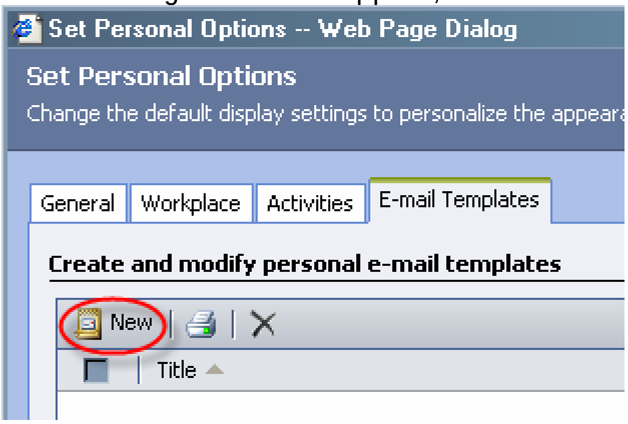
In CRM you can insert "Templates" (like Signatures in Outlook, except better) into e-mails. Templates are full e-mails (body & signature) that are pre-defined, compared to a signature is just the part that is inserted at the end of an e-mail. **Templates can also be created that are personal (only visible to the user) and global (viewable by the Organization). Also when you create templates you define where they can be used. They can be available within one entity only, (eg. only with leads), or Global, available in all entities.**

Examples of using Templates:
* Marketing campaigns
* Signatures in e-mails
* Acknowledgement of a support case
* Acknowledgement of a lead/literature request
* Thank you for a sales visit
* Holiday hours notification
* Product promotion
* Contract renewal notification

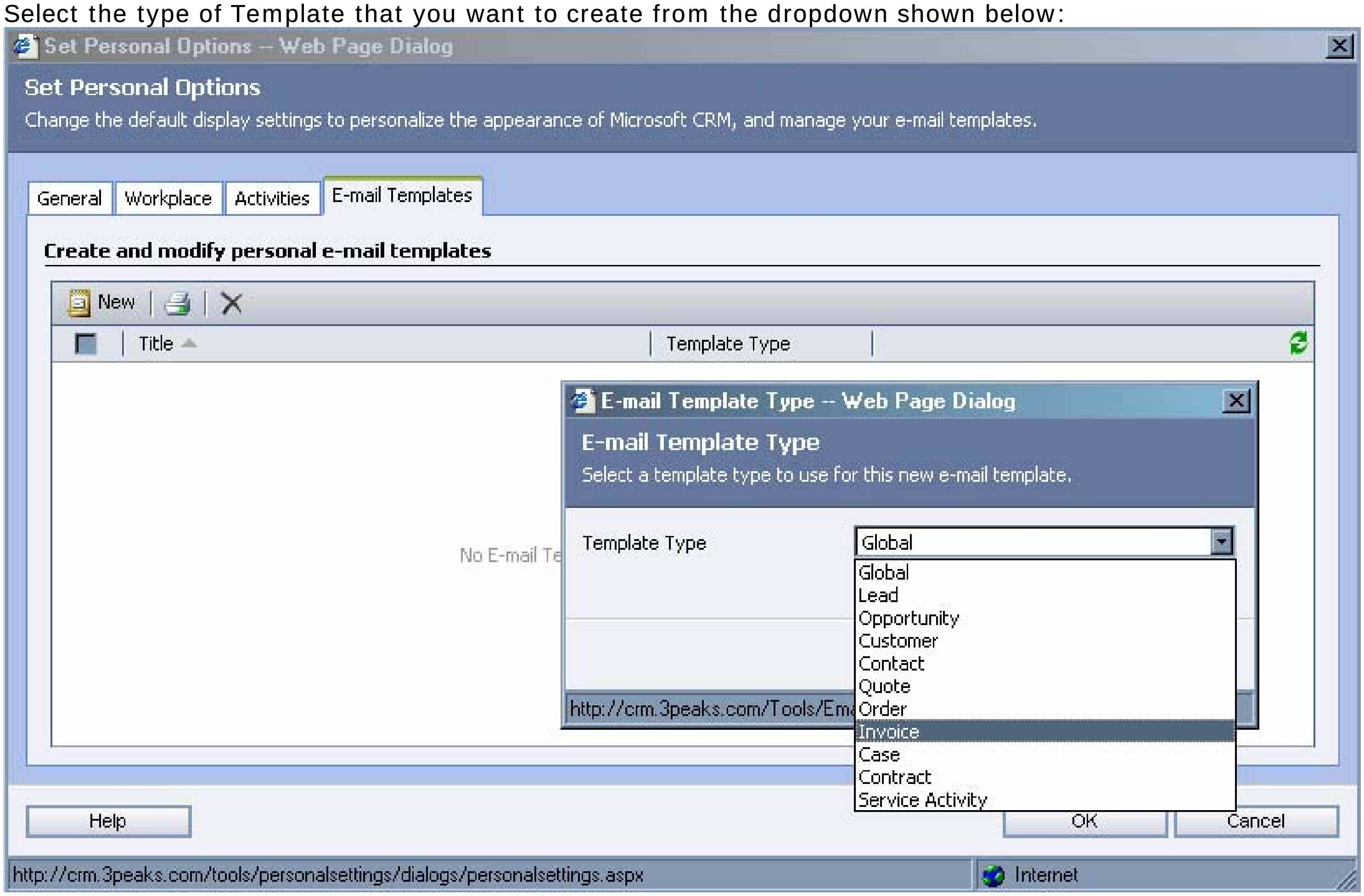
To create a personal template from within the CRM Browser version, click on Tools/options.



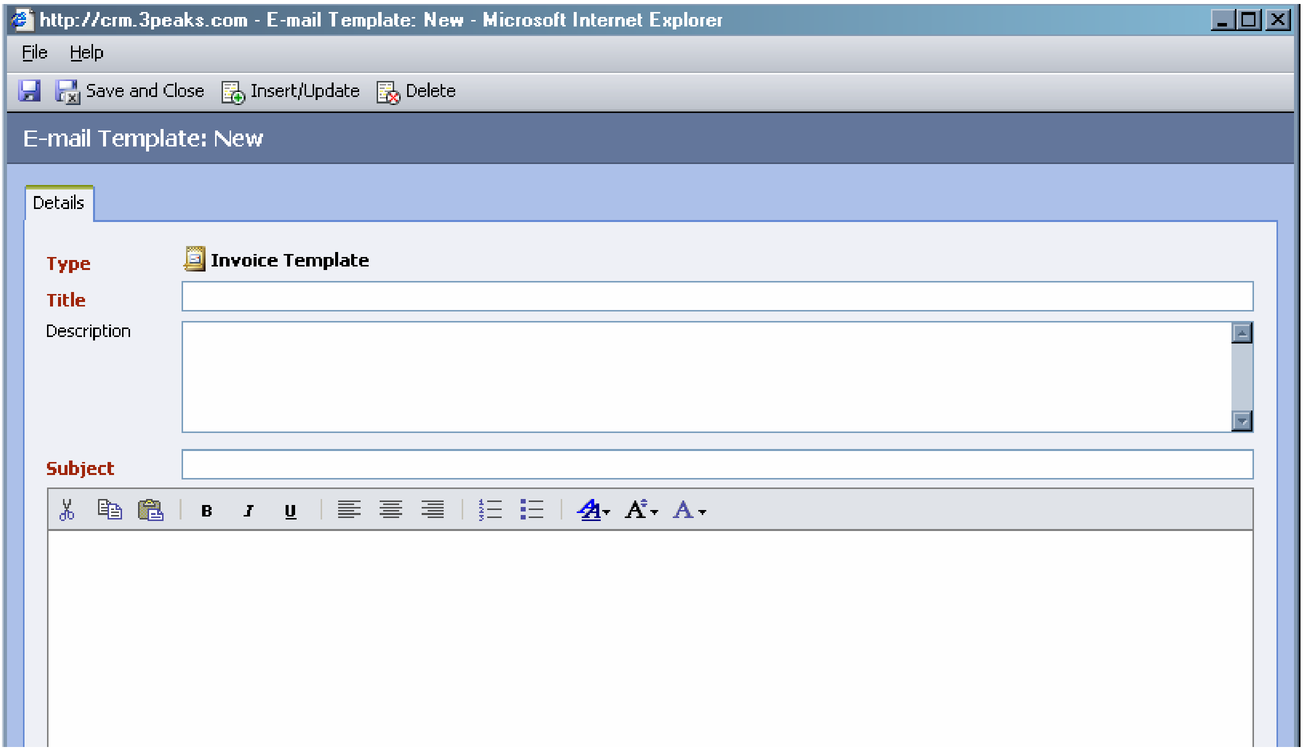
The following screen will appear, then click on the “E-mail Templates” tab, and click on new.



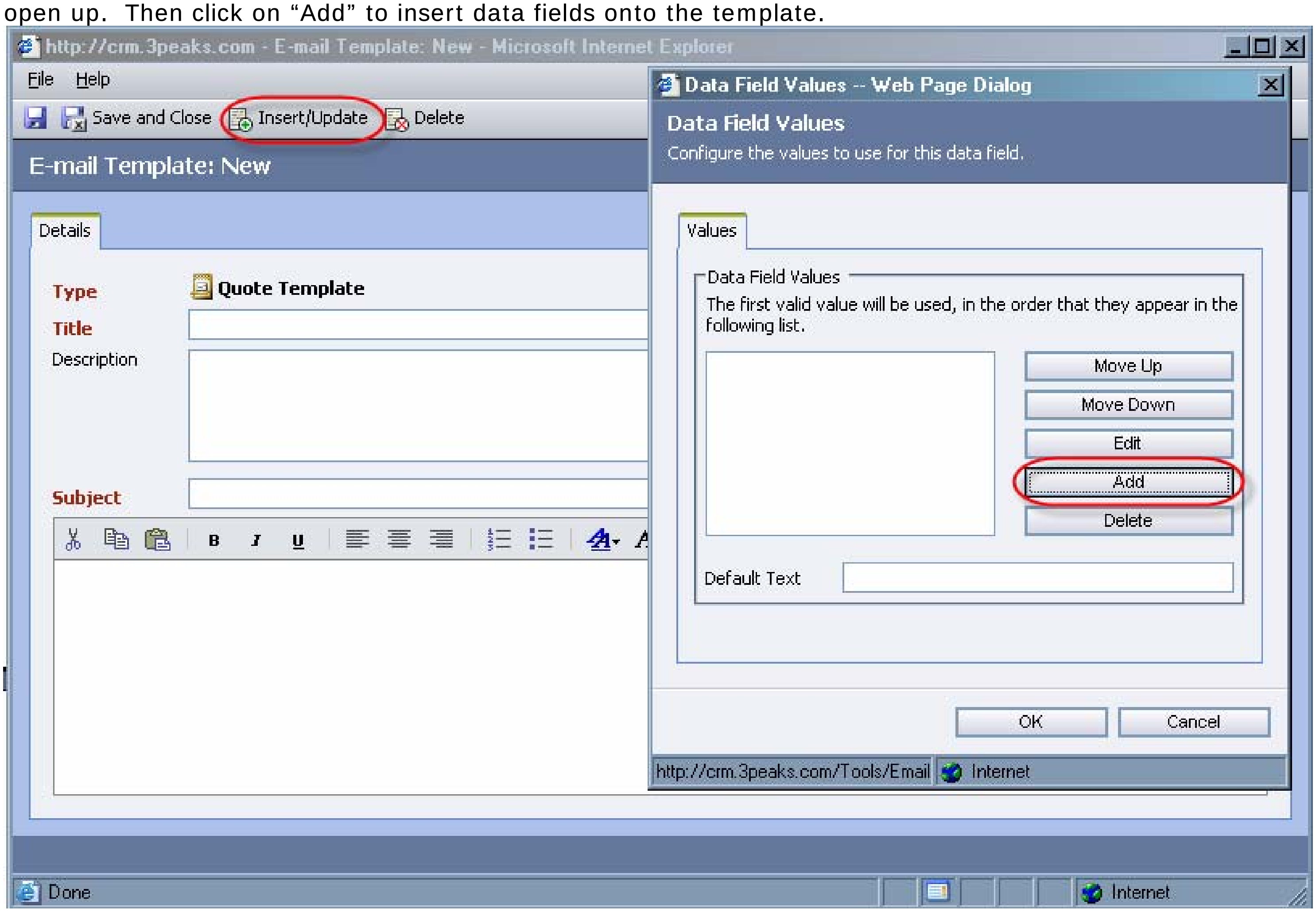
Select the type of Template that you want to create from the dropdown shown below:



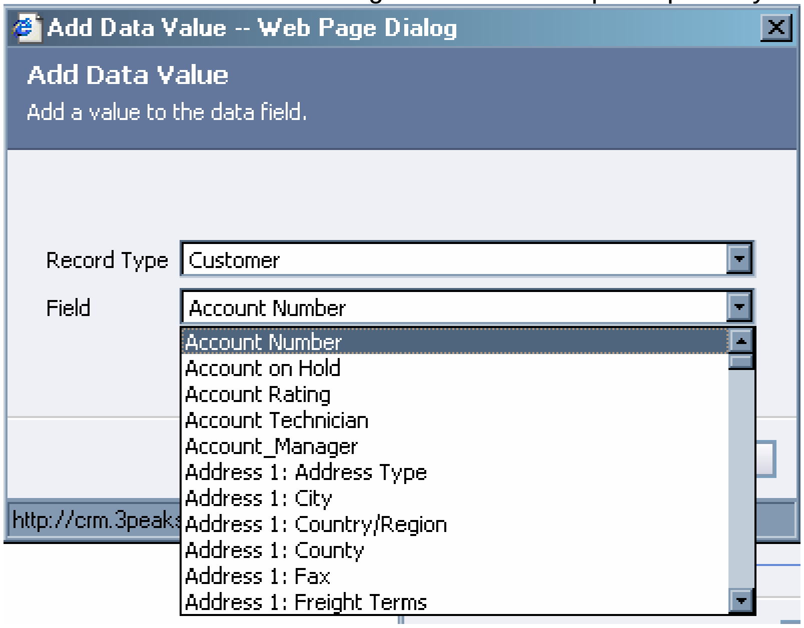
The e-mail template creation screen will then open up and you are now ready to enter your content or add data fields.



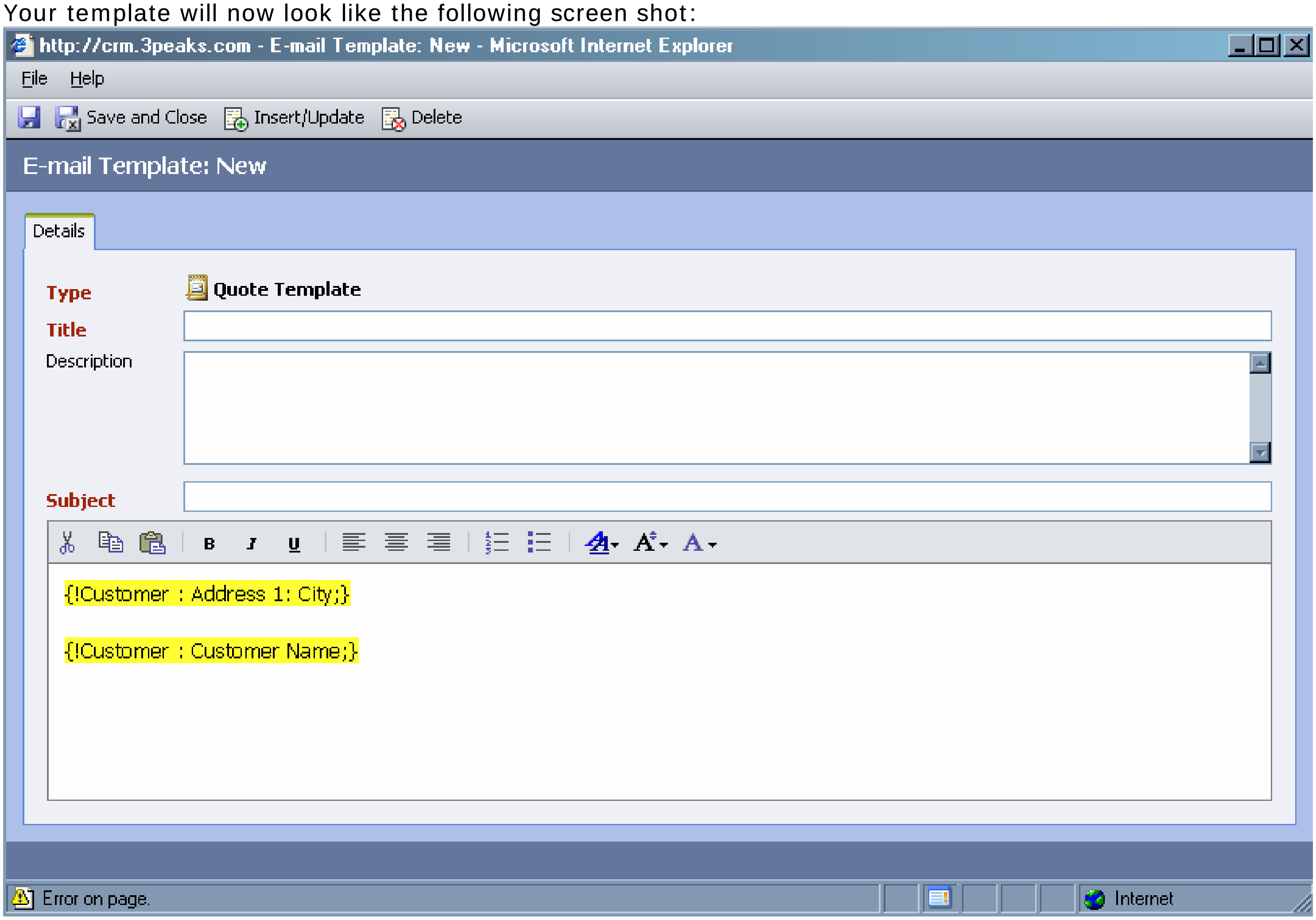
To add data fields, click on "Insert/Update" button, then the screen on the right of the screen shot below will open up. Then click on "Add" to insert data fields onto the template.



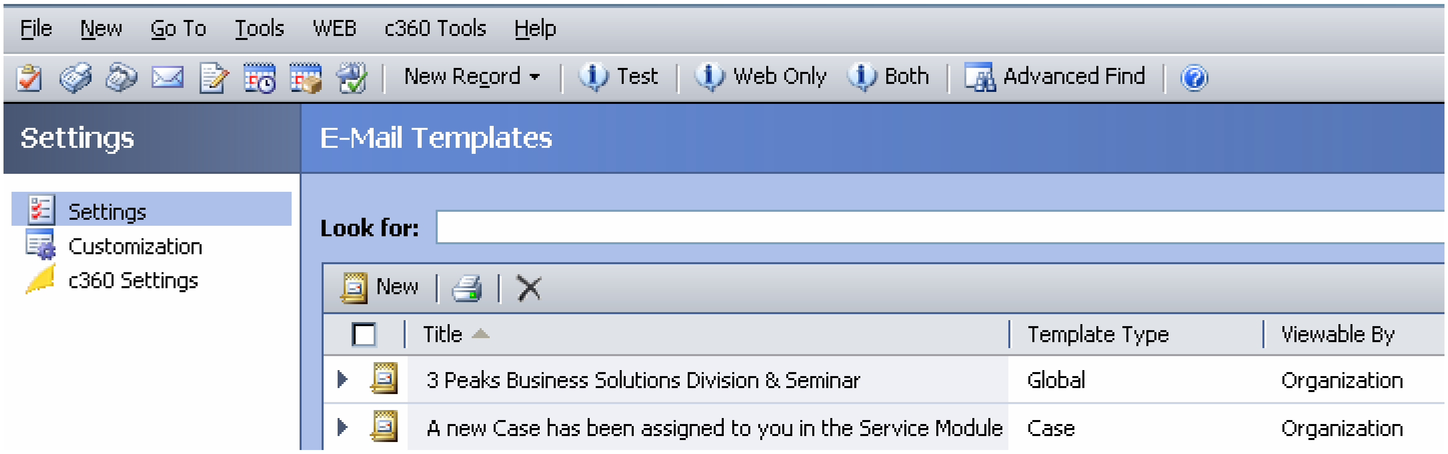
The “Add Data Value” dialog box will then open up and you can select data fields to use.



Your template will now look like the following screen shot:



To create “Global Templates”, start within the CRM Browser version, and click on “Settings”, then “Templates”, and then “E-mail Templates”. You can now create your template. Todo this you need to have access to the “Settings” area of CRM. This is usually reserved for the administrator.



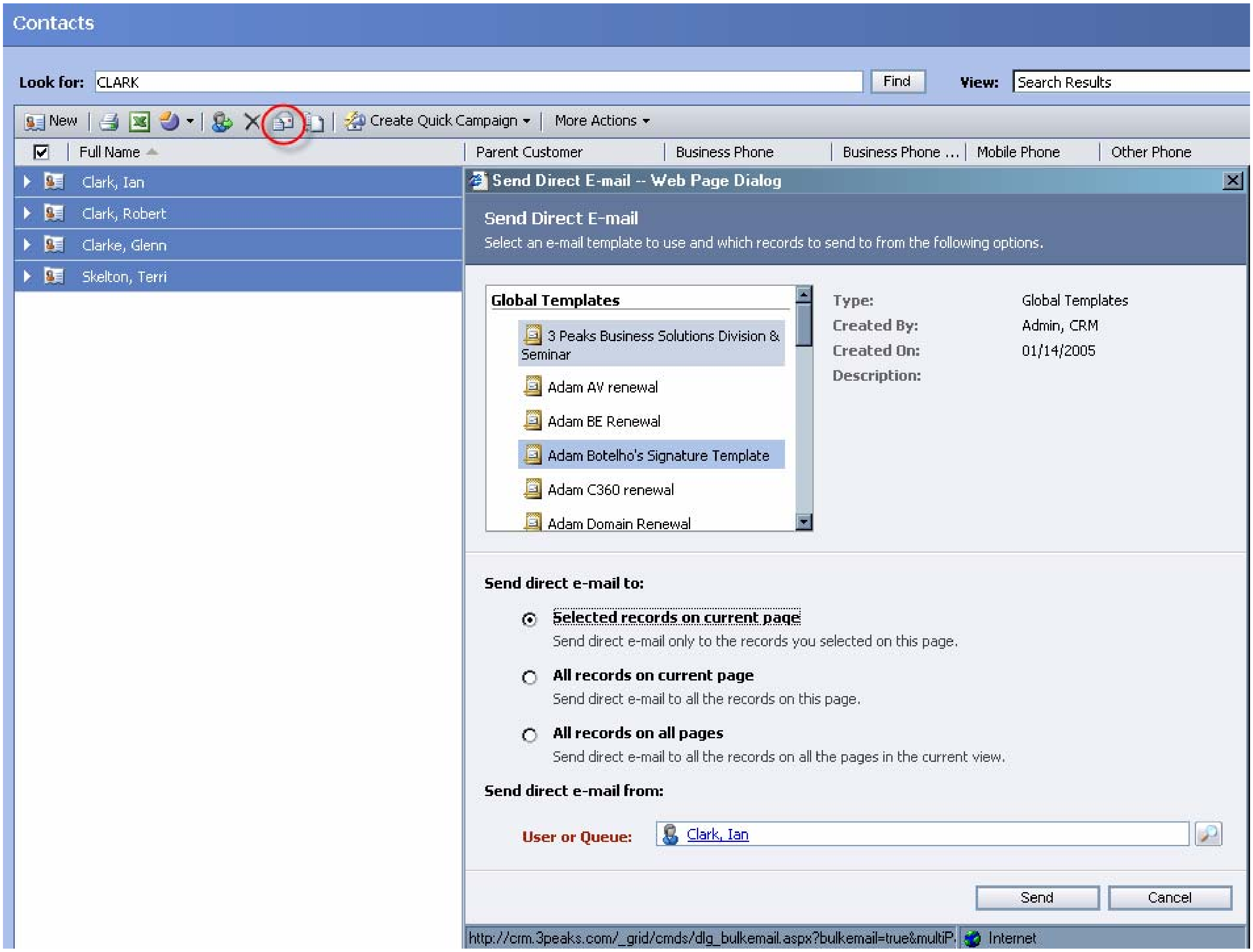
CHANGING TEMPLATES FROM SHARED TO PERSONAL OR PERSONAL TO SHARED

To change a shared template to a personal one, on the template form, on the Actions menu, click Revert to Personal Template.

To change a personal template to a shared one, on the template form, on the Actions menu, click Make Template Available to Organization.

BULK E-MAILS

You can send an email to a group of contacts by first selecting the group of contacts (this can be done by selecting a view, just highlighting the contacts you want or by doing an advanced find). Once you have selected the contacts just click on the "Send Direct e-mail" button as illustrated in the following screen shot. A window will then open that will allow you to select a template to use. You can also determine who the e-mail will be from.



INSERTING IMAGES IN E-MAILS OR E-MAIL TEMPLATES

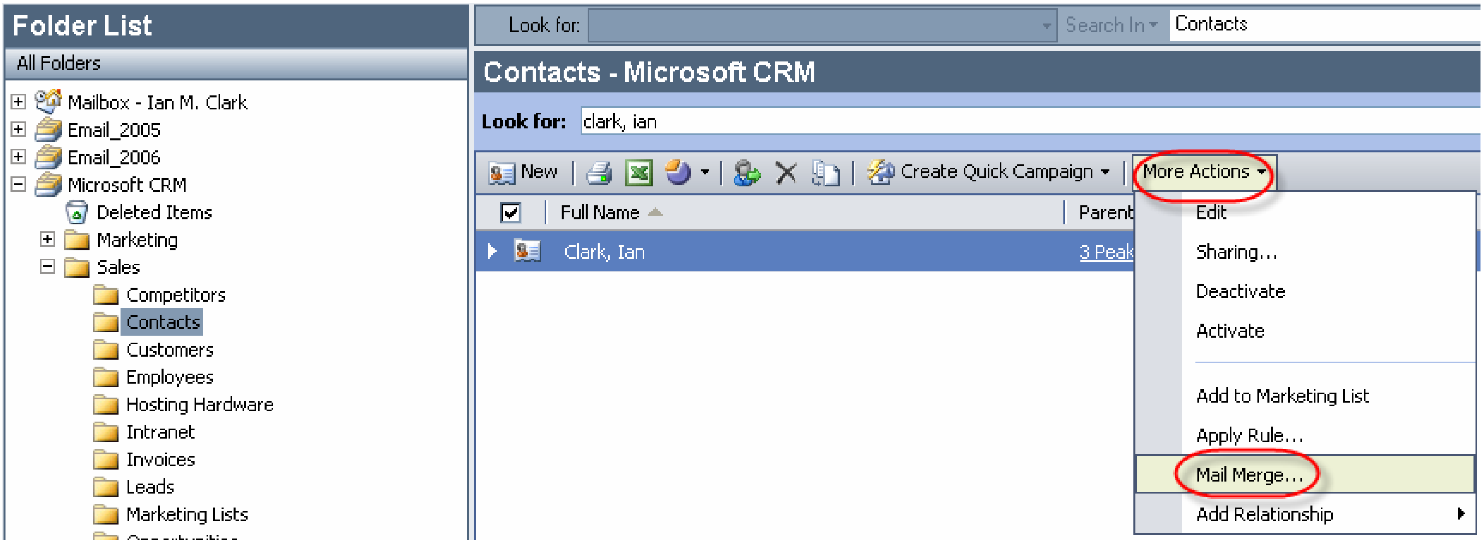
To insert an e-mail into an e-mail, open the image (jpeg, bmp or gif) in internet explorer, then right mouse click and copy/paste the image into the e-mail. This makes the image appear as an html object (as opposed to an OLE object) and allows for the image to appear.

E-MAIL MERGE IN CRM OUTLOOK CLIENT

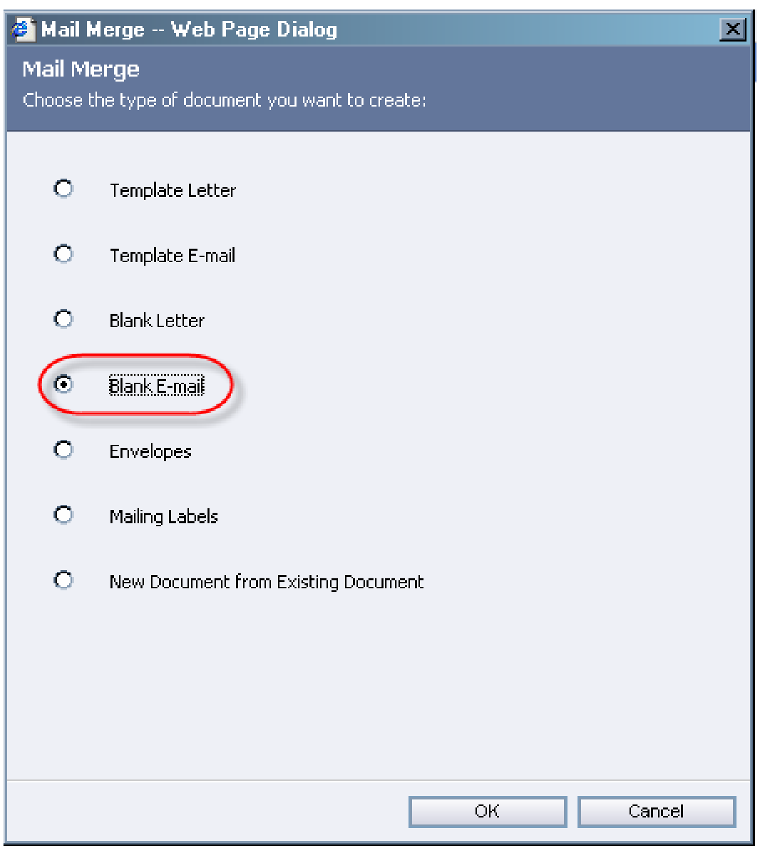
From within Outlook you can use the "Mail Merge" feature to create emails or word documents that can be filled with data from CRM.

The mail merge function enables Outlook Client users to:
* Create new templates or use an existing one to generate form letters
* Send form letters to contacts
* Resend old letters to new recipients

Once you've selected a record or a group of records, click on "more actions" then click on "Mail Merge…".



The following window will then open. To send an email select "Blank E-mail", then word will open up. Follow the mail merge screens and then you will be able to send your email.



* COMMUNICATION PREFERENCES - If any one of the selected recipients has a communication preference set to "Not Allow Mail" or "Not Allow e-mail" you receive the following message:

"Some recipients have indicated that they do not want to be contacted in this manner. Would you still like to include them anyway?"   If you select YES, the recipient will be included in the recipient set.

NOTES ON MAIL MERGE
When working with activities, note the following:
* Mail merge does not work with customized fields.
* Because Microsoft CRM is a Web application, the mail merge process runs on one list page at a time. If your records list has several pages, you have to repeat the process for each list page of records.

CREATING A MAIL MERGE DOCUMENT USING MICROSOFT WORD

1. Start the **Microsoft CRM Outlook Client**.
2. In the **Outlook Navigation Pane**, under **Microsoft CRM**, expand **Workplace**, expand **Customers**, and then click **Contacts** or **Accounts**.
3. In the **contacts** or **accounts list**, select two or more records to add to the mail-merge recipient list.
4. On the **Actions** bar, click **More Actions**, and then click **Mail Merge**.
5. In the **Mail Merge** dialog box, select the type of document you want to use. The following options are available:

    - **Template letter:** Use for letters with generic text already in the letter.
    - **Template E-mail:** Use for e-mail messages with generic text already in the message.
    - **Blank Letter:** Use for a blank letter with no existing text.
    - **Blank E-mail:** Use for a blank message with no existing text.
    - **Envelopes:** Use for labeling envelopes.
    - **Mailing labels:** Use for creating standard commercial mailing labels or custom labels.
    - **New Document from Existing Document:** Use for an existing letter, e-mail, or other document.

6. Click **OK**.
7. **Outlook** automatically opens **Microsoft Word**. In **Microsoft Word**, on the **Tools** menu, point to **Letters** and **Mailings**, and then click **Mail Merge**.
8. If you are using **Microsoft Word 2000** or later, the Mail Merge task pane starts automatically and you do not need to perform this step.
9. Follow the instructions provided by the pane. For more information, see **Microsoft Word Help** documentation.

OTHER E-MAIL TIPS

* If an e-mail address is in multiple records it will fail to resolve.

* To get the contacts e-mail addresses from CRM to show in Outlook goto Tools – Send/Receive – Download Address Book, and select “Full Details” & “Download changes since last Send/Receive, and choose “Global Address List” in the choose address book from the drop down list.

* You will notice that when you type an e-mail and hit enter an extra line will be inserted between each line of text. To not insert this extra line, just hold down the shift key and press the enter key to move to a new line.