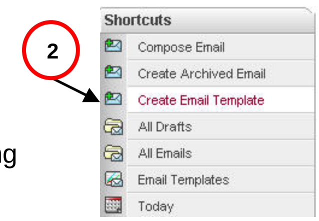
CREATING AND USING PROSTAR CRM EMAIL TEMPLATES:

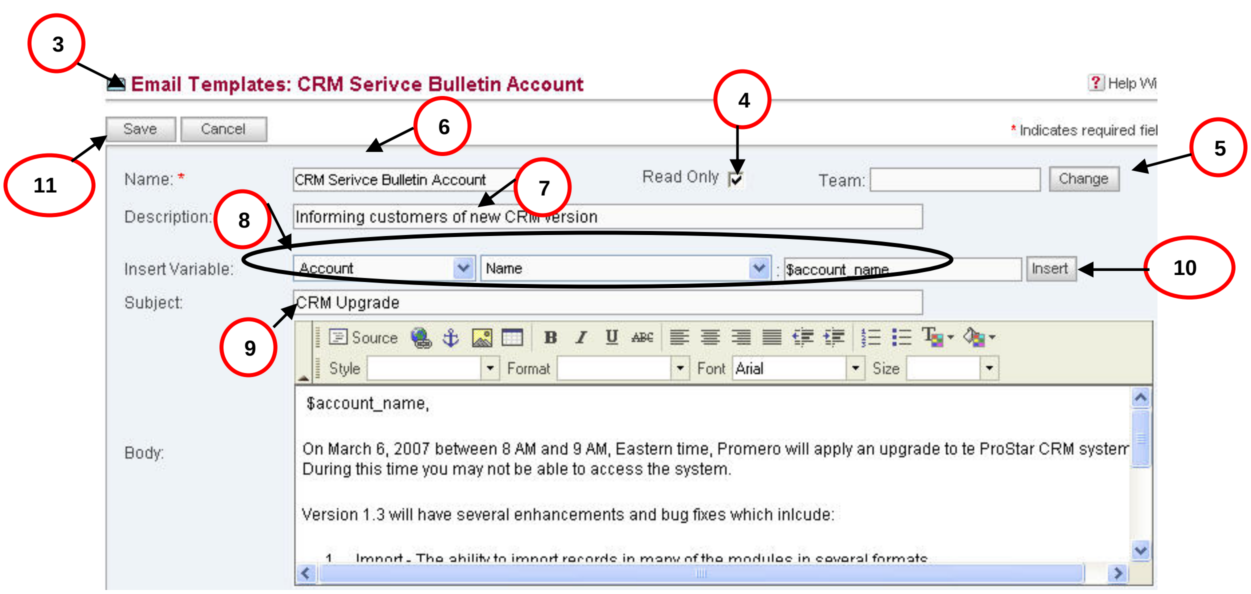
Note: You can create an email template against an Account or Contact; BUT not both.

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

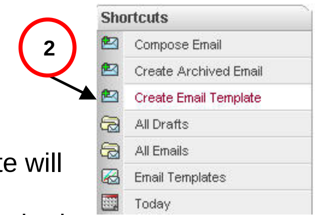
   Notice account_name populates to the left of the insert button.
9. **Enter a subject for your template.**
10. **Click Insert** (you **MUST** click insert to place the variable into the body of your template. **Optional:** Enter Dear or any salutation you desire in front of the $account_name. You can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

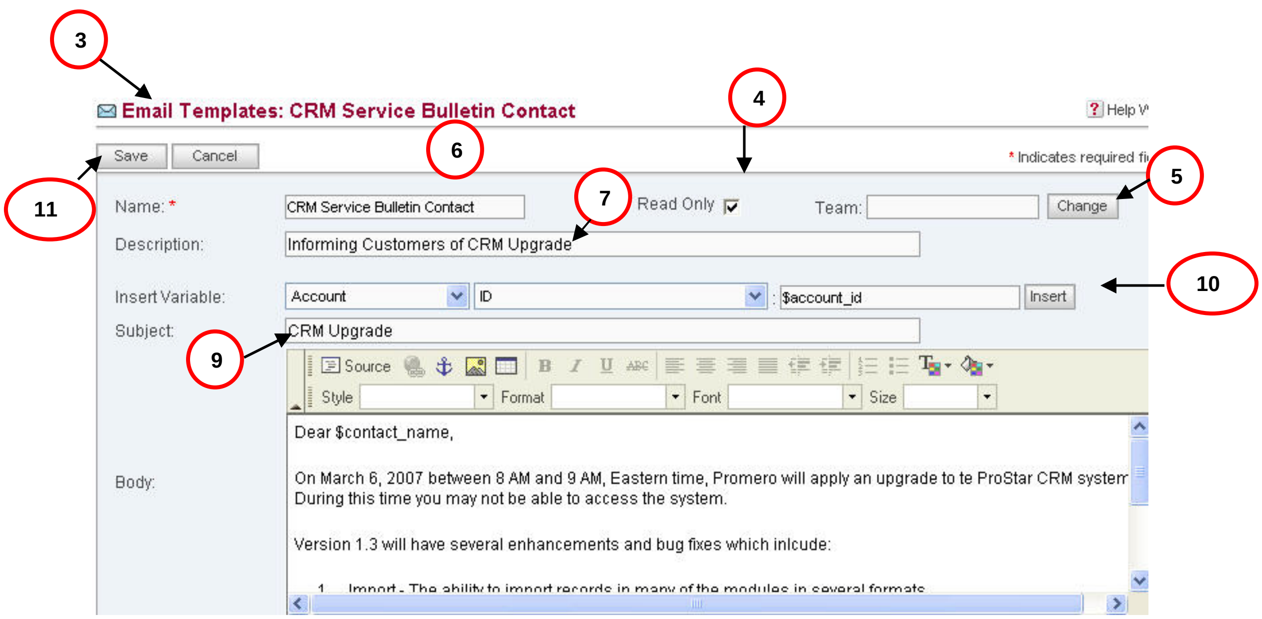


B. Creating an Email Template for a Contact:

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

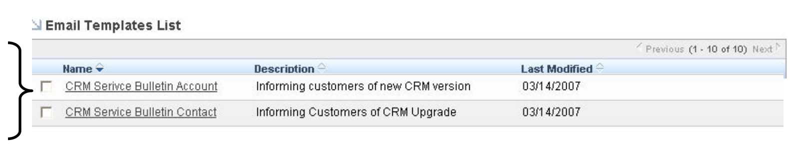
   Notice contact_name populates to the left of the insert button.
9. **Enter a subject for your template.**
10. **Click Insert** (you **MUST** click insert to place the variable into the body of your template. **Optional:** Enter Dear or any salutation you desire in front of the $account_name. You can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



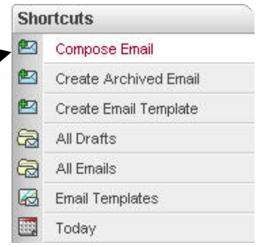


C. Check Email Templates to see a listing of your templates:

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.



D. Composing an Email using your new Template

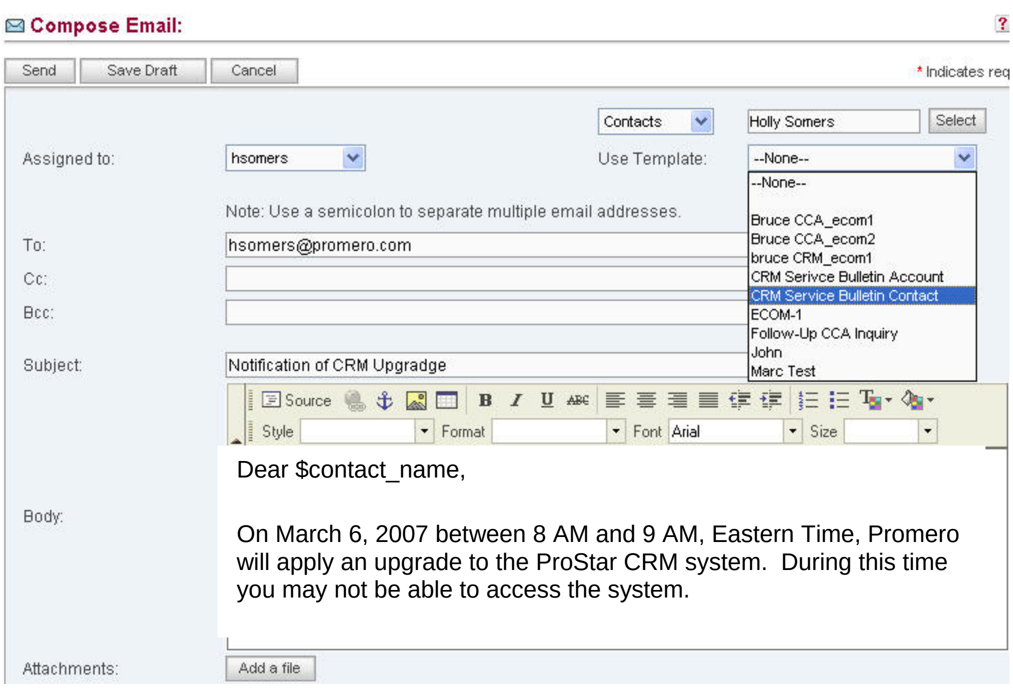


1. **Click Emails Tab** from CRM main Module window.
2. **Click Compose Email** from Shortcuts menu.
3. **Assigned to**: defaults to person composing the email. Click the down arrow to change assigned to name.
4. **Enter a To email address.**
5. **Optional**: Enter Cc: and Bcc:
6. **Enter Subject.**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

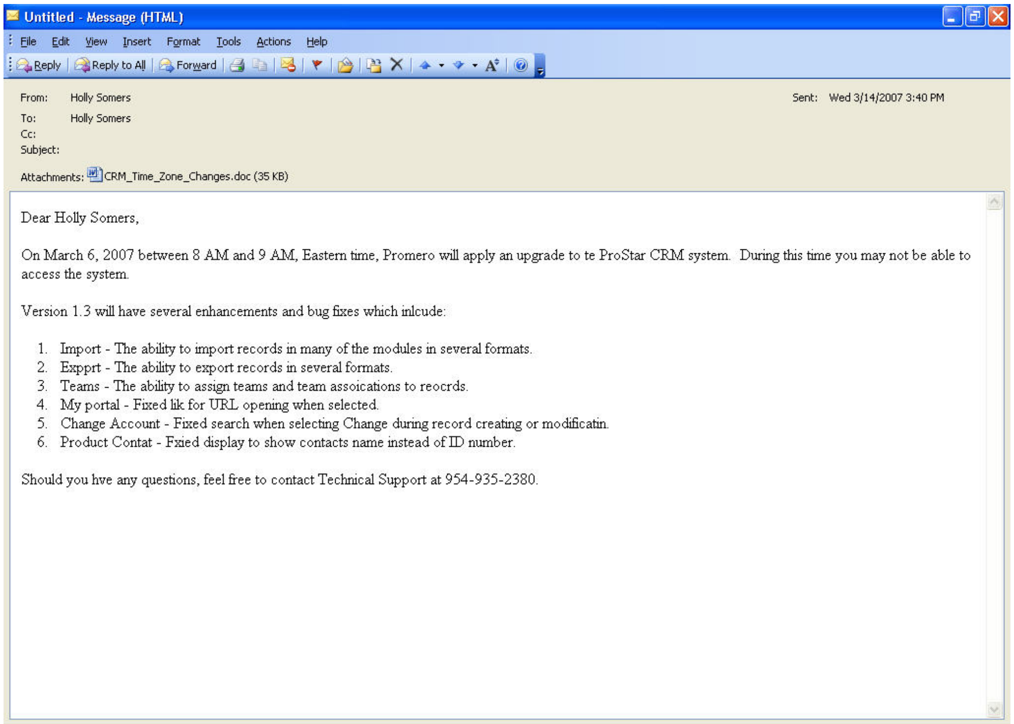
   If you receive this error message, click OK. You will be returned to your compose email window.

   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:



Untitled - Message (HTML)

File Edit View Insert Format Tools Actions Help

Reply | Reply to All | Forward

From: Holly Somers Sent: Wed 3/14/2007 3:40 PM
To: Holly Somers
Cc:
Subject:
Attachments: CRM_Time_Zone_Changes.doc (35 KB)

Dear Holly Somers,

On March 6, 2007 between 8 AM and 9 AM, Eastern time, Promero will apply an upgrade to te ProStar CRM system. During this time you may not be able to access the system.

Version 1.3 will have several enhancements and bug fixes which inlcude:

1. Import - The ability to import records in many of the modules in several formats.
2. Expprt - The ability to export records in several formats.
3. Teams - The ability to assign teams and team assoications to reocrds.
4. My portal - Fixed lik for URL opening when selected.
5. Change Account - Fixed search when selecting Change during record creating or modificatin.
6. Product Contat - Fxied display to show contacts name instead of ID number.

Should you hve any questions, feel free to contact Technical Support at 954-935-2380.