

SNC DYNAMIC E-MAIL TEMPLATES

IT's like you.

The solution **SNC Dynamic E-Mail Templates** introduces a new type of e-mail templates which overcome the limitations of the default CRM e-mail templates.

This solution allows you to:

- + Create e-mail templates which target any entity in your system instead of only predefined entities.
- + Create e-mails on the basis of your templates for any record of the templates target entity.
- + Design e-mail templates with a fully functional HTML editor. E.g. the usage of bold, underlined or italic texts and the insertion of images.
- + Use any field from the targeted entity or any related entity as placeholder in your e-mail template.
- + Create your templates fast and efficient with a variety of keyboard shortcuts.
- + Organize e-mail templates with a user-defined categorization.
- + Manage the administration and usage permissions for your templates.

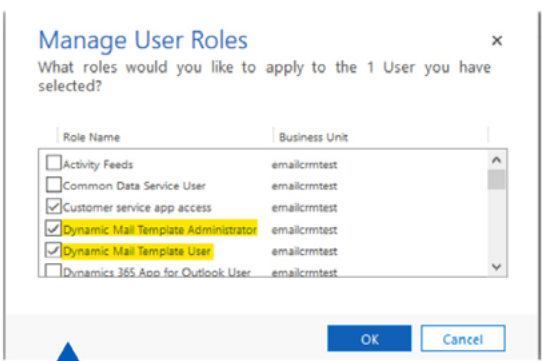


HELP

We prepared some screenshots in specific category groups, that will help you to operate with „SNC Dynamic E-Mail Templates“.

01

Permissions and Security



Manage User Roles

What roles would you like to apply to the 1 User you have selected?

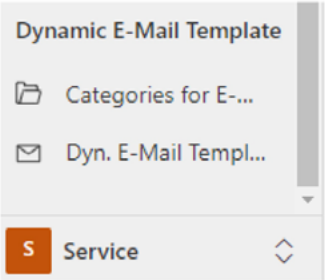
Role Name	Business Unit
<input type="checkbox"/> Activity Feeds	emailcrmtest
<input type="checkbox"/> Common Data Service User	emailcrmtest
<input checked="" type="checkbox"/> Customer service app access	emailcrmtest
<input checked="" type="checkbox"/> Dynamic Mail Template Administrator	emailcrmtest
<input checked="" type="checkbox"/> Dynamic Mail Template User	emailcrmtest
<input type="checkbox"/> Dynamics 365 App for Outlook User	emailcrmtest

OK Cancel

To allow a user to use the templates, it needs the security role "Dynamic Mail Template User". For administrating templates and categories, the user needs the role "Dynamic Mail Template Administrator".

02

Navigation



Dynamic E-Mail Template

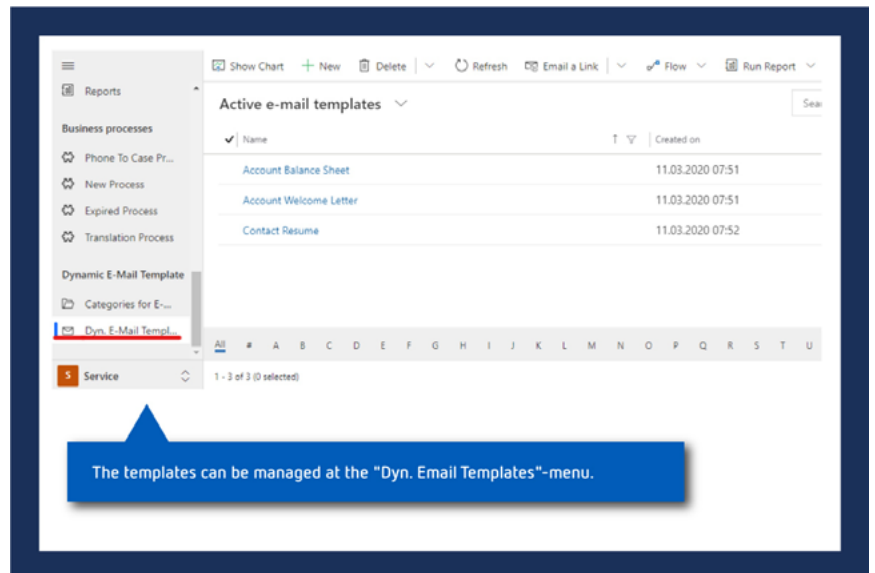
- Categories for E-...
- Dyn. E-Mail Templ...

S Service

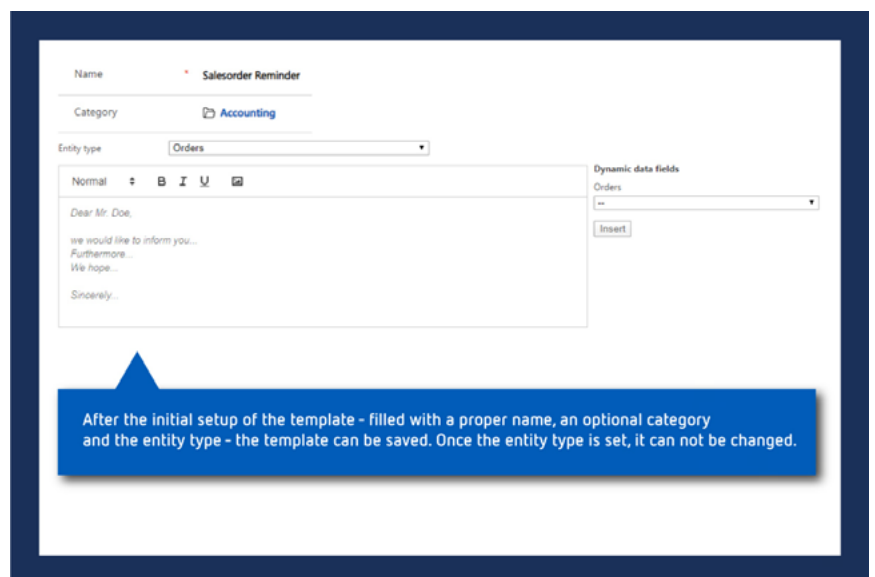
This solution contains two entities and is integrated into the Service sitemap. Through the sitemap the user can navigate to the desired points of interest.

03

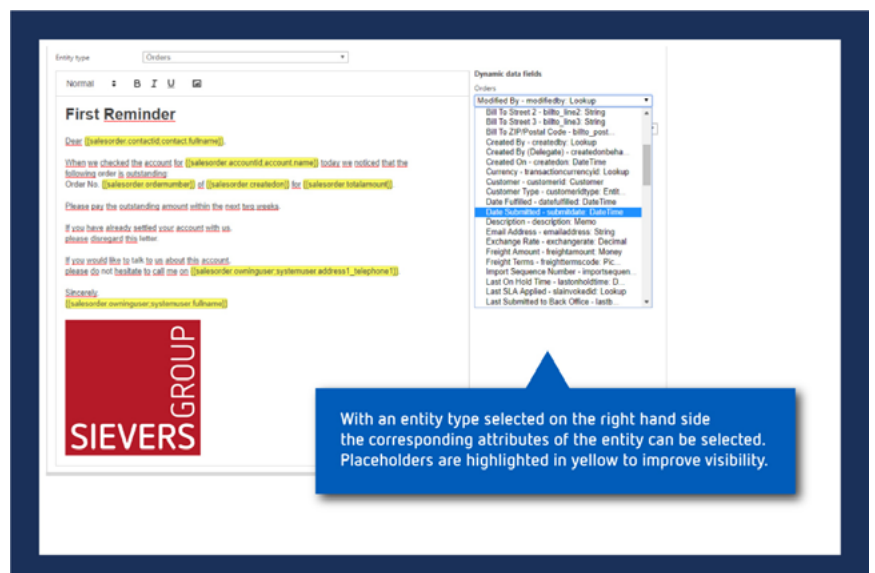
Templates



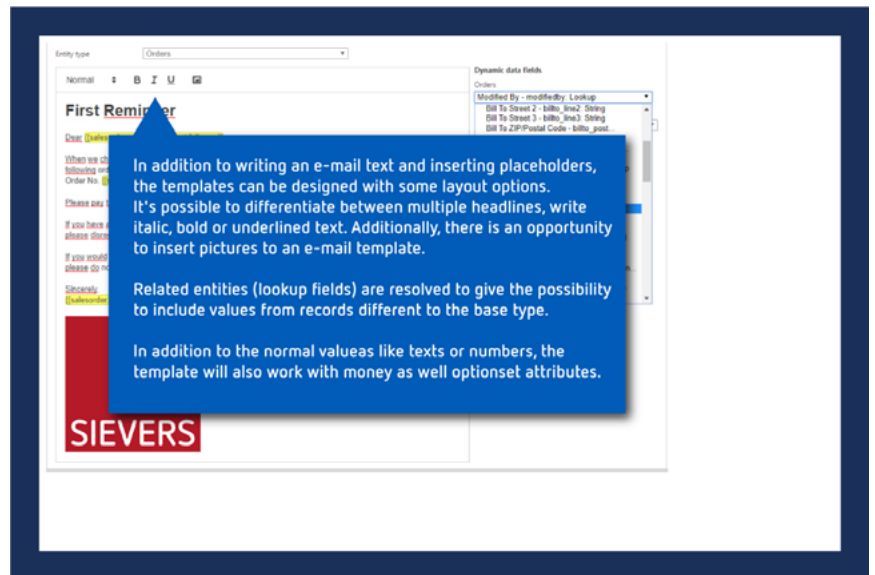
The templates can be managed at the "Dyn. Email Templates"-menu.



After the initial setup of the template - filled with a proper name, an optional category and the entity type - the template can be saved. Once the entity type is set, it can not be changed.

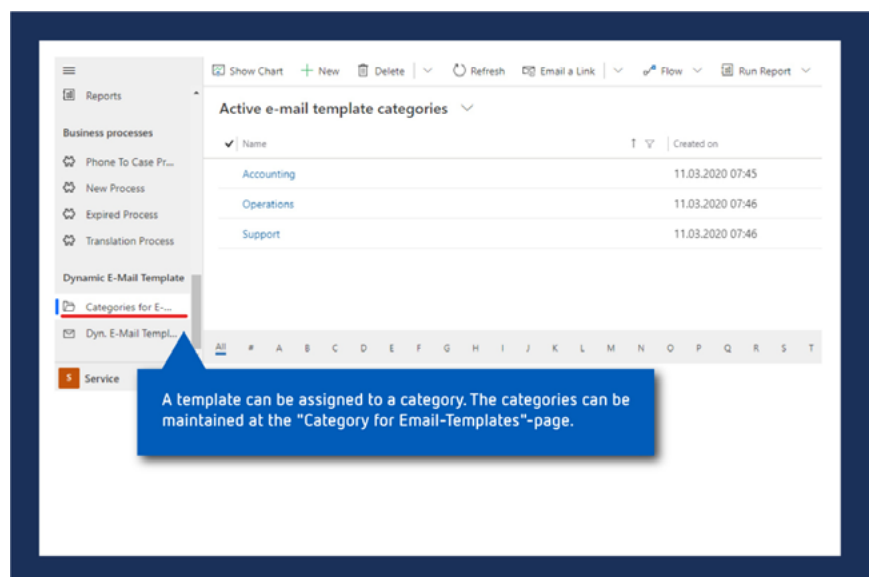


With an entity type selected on the right hand side the corresponding attributes of the entity can be selected. Placeholders are highlighted in yellow to improve visibility.



04

Categorization

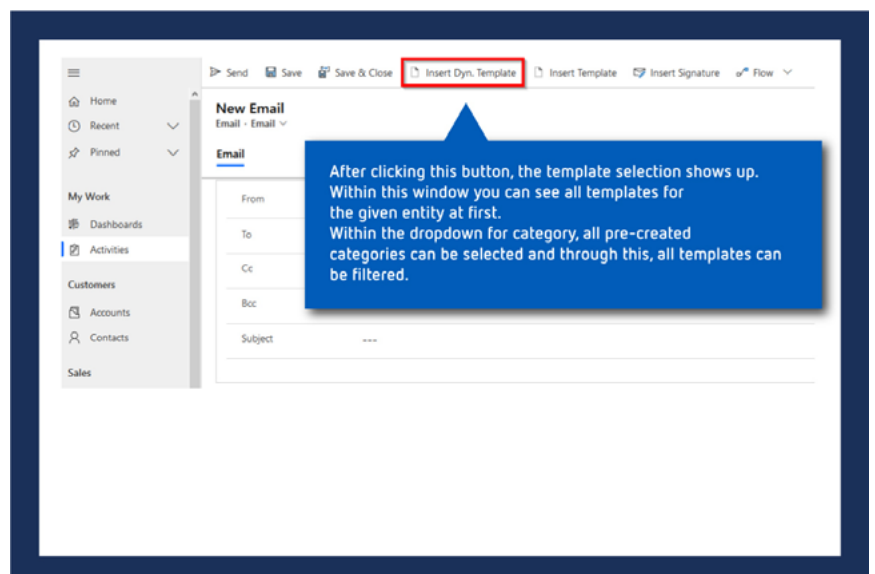


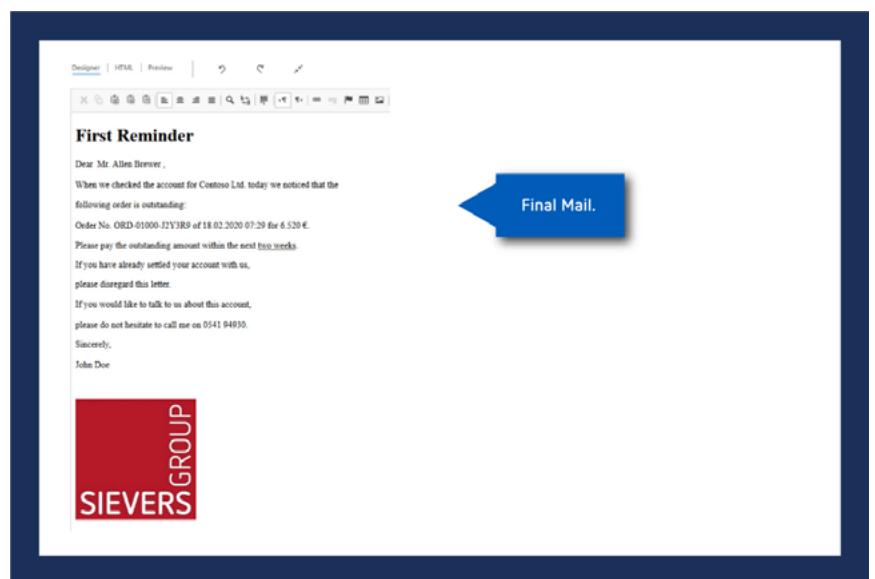
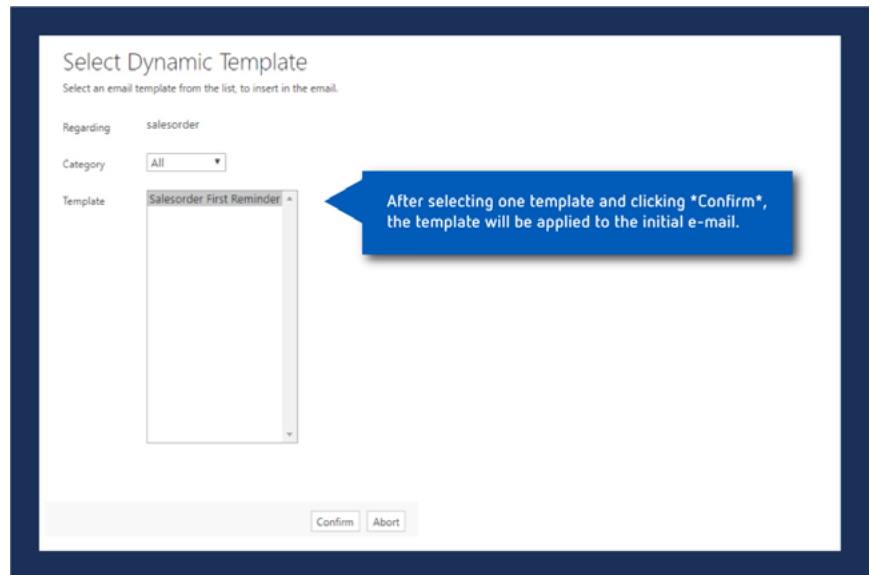
05

Applying a Template

To apply a template, first create a new e-mail message. Please note, that the field *Regarding* has to be set to the entity type of the template. Only templates for the given entity are shown.

After creating a new email and saving it for the first time, a new button *Insert Dyn. Template* appears.





SUPPORT

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