EMAILTEMPLATES

Email Templates™ Users Guide

For Version 6.0

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Introducing Email Templates™

Email Templates™ works as an add-in to Microsoft Outlook and/or Microsoft Exchange, and:

- ✓ Gives your business an affordable desktop solution to email management
- ✓ Gives you an efficient way to answer email
- ✓ Helps you stay connected with your clients and customers
- ✓ Increases employee productivity
- ✓ Enhances your on-line customer relationships
- ✓ Strengthens internal communication efforts
- ✓ Presents personalized and professional communication
- ✓ Retains a high level of quality and service to your customers

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If your business is support, service or sales…or if you work in any business that receives a large amount of email, Email Templates™ provides you with a way to respond quickly, professionally, and personally – all with the click of a button! Your business will see an immediate boost in employee productivity as Email Templates™ lightens your daily email task load.

Highlights

Email Templates™ enables you to save email messages as templates. Using the templates eliminates the need to re-type the same message over and over again, or perform *cut-and-paste* operations to send the same message more than once or to several recipients.

Email Templates™ will automatically address reply messages, insert email addresses, create personalized first name greetings, insert customized text, and other elements that can be custom-designed to meet your business communication needs.

Email Templates™ supports HTML formatting, so specific fonts and text such as bold, italics, and underline are retained. Your messages look exactly the way you created them. This allows your company to maintain a consistent corporate image and gives a polished look to your electronic correspondence.

Email Templates™ works as an add-in to Microsoft Outlook and Microsoft Exchange. It integrates seamlessly into your email environment, providing unique new time-saving capabilities, without requiring you to change your work habits.

What You Need to Know

This User's Guide assumes that you are using Microsoft Windows 95/98 or higher, or Windows NT and that you are familiar with basic Windows concepts and terminology. A working knowledge of Microsoft Outlook or Microsoft Exchange is also assumed.

Types of Email Templates™

There are four different types of templates available with Email Templates™: New Message Templates, Reply Templates, Forward Templates and Quote Templates.

New Message Templates

New Message Templates are used to create a new message from an existing template. Templates are email messages provided in a special folder typically named 'Templates'. New Message Templates are applied to an existing message by first opening the message or selecting the message from a chosen folder. Various selections from the previous message are carried over to the new message in the form of elements. These elements are explained in greater detail later. The new message is then created when a template is selected from the template menu or template list and displayed for approval. It can then be submitted by clicking the send or submit button in the toolbar, just like other new messages.
You can pre-address your template by entering the recipient's address in the template's TO:, CC:, or BCC: fields.

Reply Templates

Reply Templates are used to automatically create a custom reply to a message from an existing template. Reply Templates are email messages provided in a special folder. Normally these templates are kept in a subfolder of 'Templates' named 'Reply'. As with New Message Templates, Reply Templates are applied to an existing message by opening the message or selecting the message from a chosen folder. The TO: field of the message is automatically filled with the sender's email address. The original subject will be retained with the RE: prefix added. The new message is then created when a template is selected from the template menu or template list and displayed for approval. It can then be submitted by clicking the submit button in the toolbar, just like other new messages.

Forward Templates

Forward Templates are used to automatically forward a message using a custom envelope created from an existing template. Forward Templates are email messages provided in a special folder, normally a subfolder of 'Templates' named 'Forward'. As with New Message Templates and Reply Templates, Forward Templates are applied to an existing message by opening the message or selecting the message in the chosen folder. The template will retain the subject of the original message with the FW: header added as a prefix. Like New Message Templates, the TO: field does not carry over the sender's original email, although you may pre-address the message just as you would with the New Message Template. The new message is then created when a template is selected from the template menu or template list, and displayed for approval. It can then be submitted by clicking the submit button in the toolbar, just like other new messages.

Quote Templates

Quote Templates provide the functionality of a clipboard. Unlike the other templates, Quote Templates are applied to the message you are currently composing. These templates offer a place to store frequently-used text which can then be pasted into other messages. They appear as email messages in a folder. Normally these templates are kept in a subfolder of 'Templates' named 'Quote'. When composing a new message you can click on the Quote Templates button, select the desired text and automatically paste it into your new message. The text is pasted into the current location of the cursor inside the message. You may also use Quote Templates to create a new message, just as you would a New Message Template.

Getting Started

What is on Your Screen
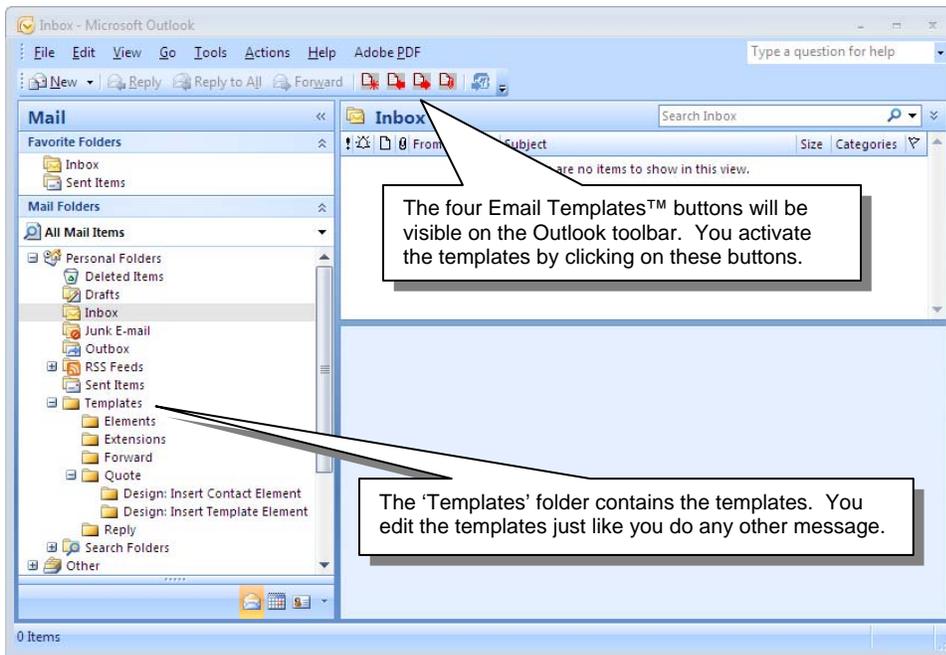
Email Templates™ Buttons on the Outlook Toolbar

The buttons correspond to each of the template types:

First button activates **New Message Templates**

Second button activates **Reply Templates**

Third button activates **Forward Templates**

Fourth button activates **Quote Templates**

Using the Sample Templates

You will find a selection of Sample Templates included with your Email Templates™ installation. You may use these templates as they are, or customize them to your needs.

*Note that the name of the template is the same as its subject.

New Message Templates

Sending a 'New Message From Template'

1. Select a message from your Outlook folders by highlighting the message.
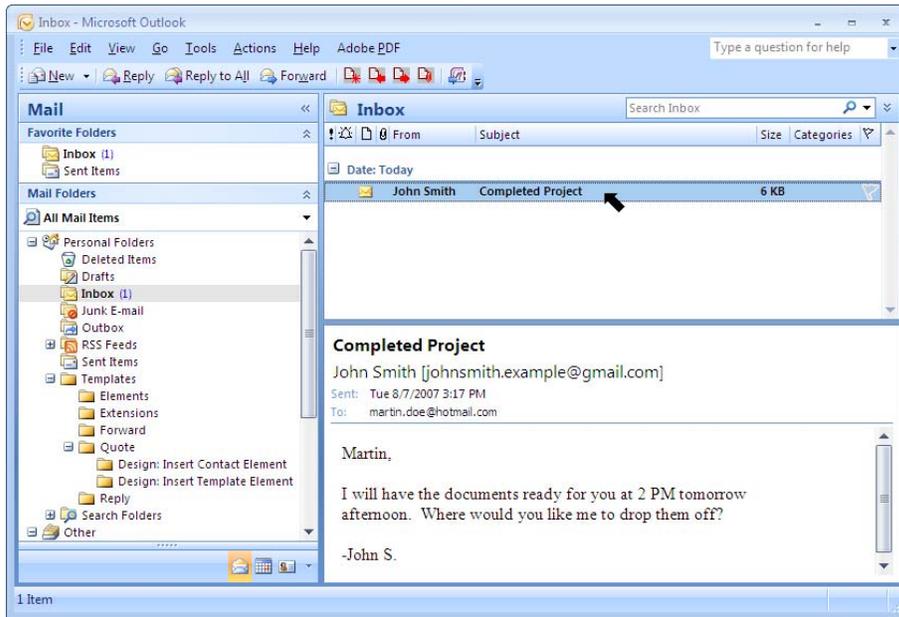
2. Select a New Message Template by clicking on the 'New Message From Template' button.

First button activates **New Message Templates**
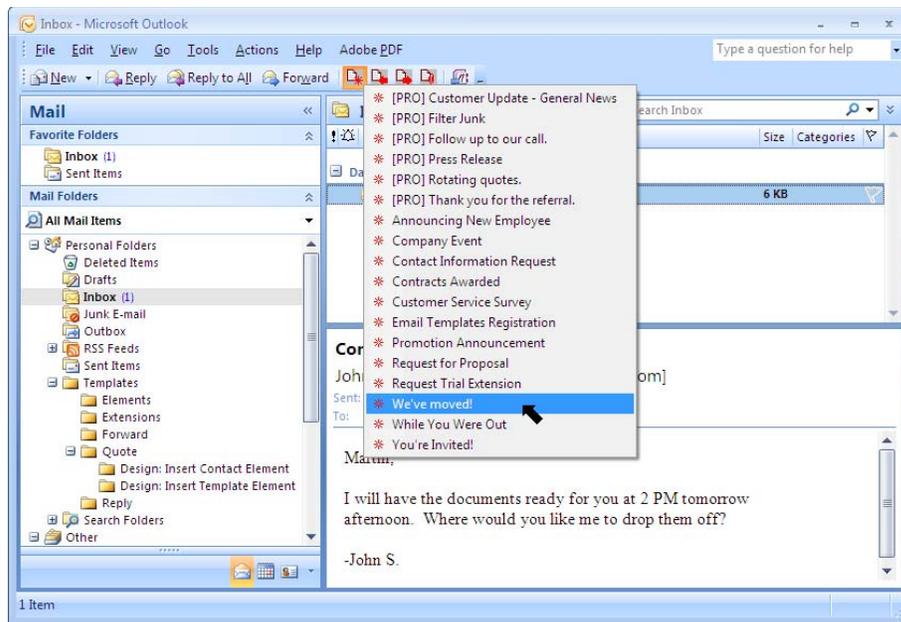
You will find this button in the standard Outlook toolbar at the top of your screen once you have downloaded and installed Email Templates™.

Alternatively, you can choose from your 'Actions' menu. Click on 'Actions', 'Email Templates', 'New Message From Template…'.
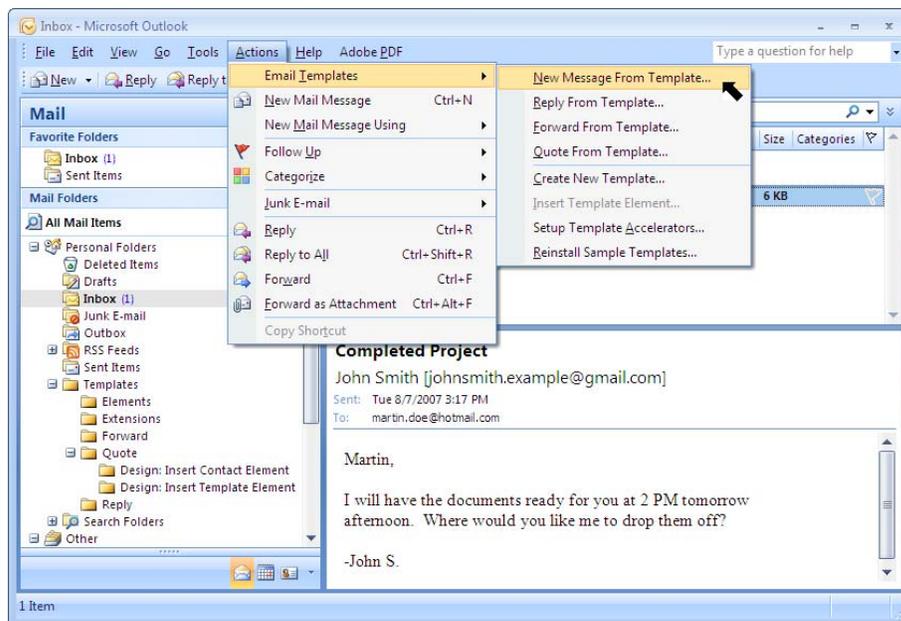
3. Pick the template you wish to send and follow the prompts.

    If you are using the 'New Message From Template' button, simply click on the message template and follow the prompts to personalize the information in the template.

    If you click on 'Actions', 'Email Templates', 'New Message From Template…', highlight the template you want to use and click 'OK'. Follow the prompts to personalize the information.
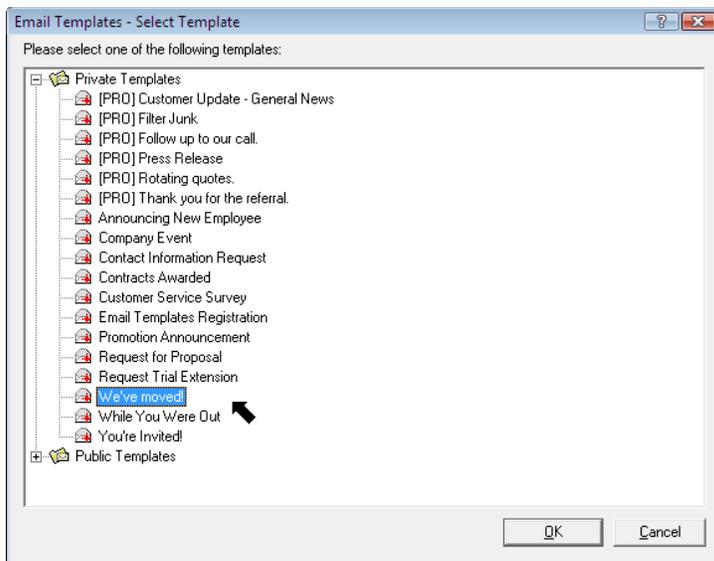
For Outlook 2007, the template buttons can also be accessed through the "Add-Ins" tab in the ribbon or through the "Toolbar Commands" button in the Quick Access Toolbar.
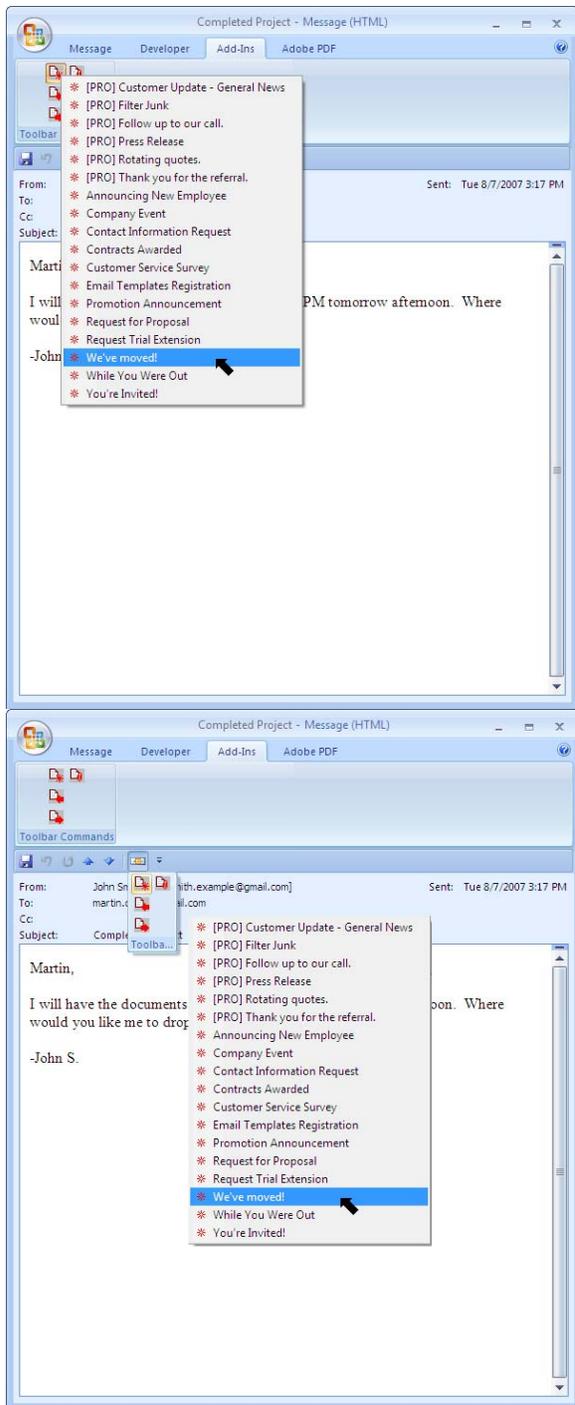
4. You can change any text within the email before sending. When finished, click 'Send'.

Editing a 'New Message From Template'

In order to send out a template that has all the personalized information you want to have in it, you must follow the following steps.

1. Go to the 'Templates' folder in your Outlook or Exchange Mailbox.

If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

2. Open a template by double-clicking on it. Then make changes just like you do with any other message.

3. When you are finished, click on the 'Save' button to retain your changes, and then use the template as described in the **Sending a 'New Message From Template'** section of these Help Files.

Example: Editing and Using a New Message Template

This is a New Message Template called "We've moved". Please note that the subject of the email is the same as the title of the new email template.
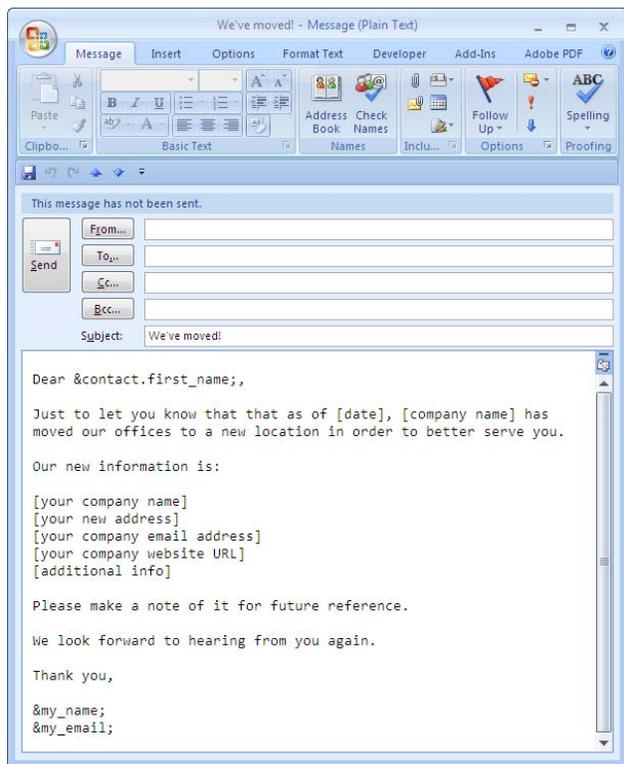
By highlighting a message in your Outlook folder, you are asking Email Templates™ to send a new message from this template to the person who sent you the email.

&contact_first_name; is an element that tells the message to pick the first name of the contact you are emailing and put it in the message after "Dear".

[date], [company name], [your company name], [your new address], [your company email address], [your company website URL], [additional info] should all be filled in to the template before sending.

&my_name; is an element that tells Email Templates™ to insert your name into the template.

&my_email; is an element that tells Email Templates™ to insert your email address into the template.

1. Go to the 'Templates' folder in your Outlook or Exchange Mailbox.

   If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder. Look in the folder 'Templates' for the template called "We're moving!"

   Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

2. Open the "We're moving!" template by double-clicking on it.

3. Then, make changes just like you do with any other message to personalize it. In this case, fill in the [date], [company name], [your company name], [your new address], [your company email address], [your company website URL], [additional info].

   It should now look like this:

4. Now click 'Save', then exit the template.

5. Go to your contacts folder and select a contact to send this email to by highlighting it.

6. Select the "We've moved!" template by clicking on the 'New Message From Template' button.
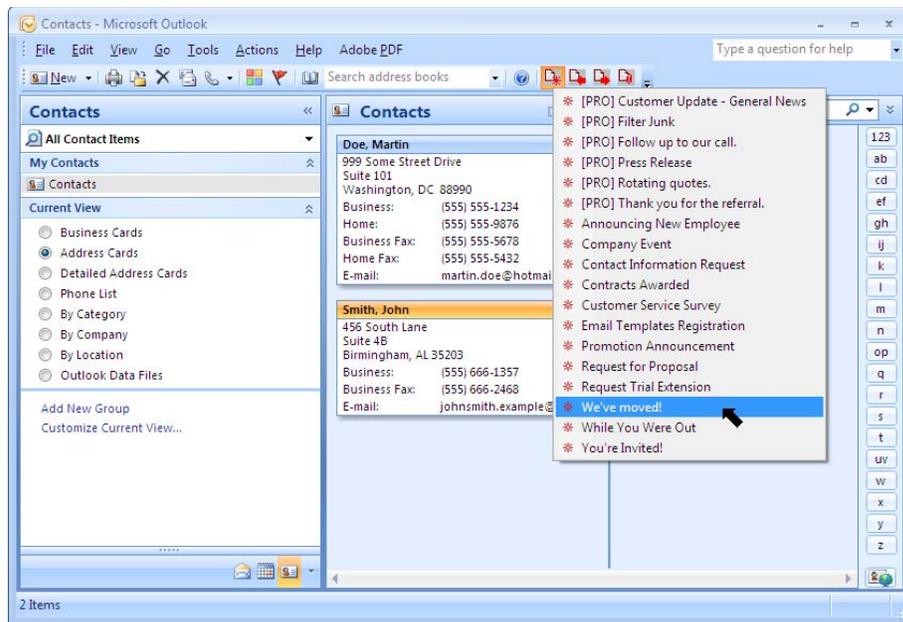
Alternatively, you can choose from your 'Actions' menu by clicking on 'Actions', 'Email Templates', 'New Message From Template…'. Pick the "We're moving!" template.

Outlook 2007 users can also access the template buttons through the "Add-Ins" tab in the ribbon or through the "Toolbar Commands" button in the Quick Access Toolbar.

7. You have now created an email message that tells John Smith that your company has changed locations.
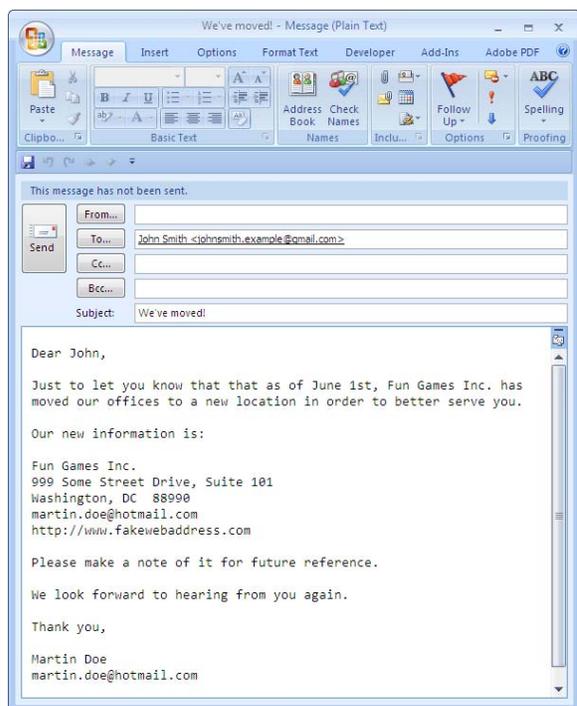
Reply Templates

Sending a 'Reply From Template'

1. Select a message from your Outlook folders by highlighting the message.
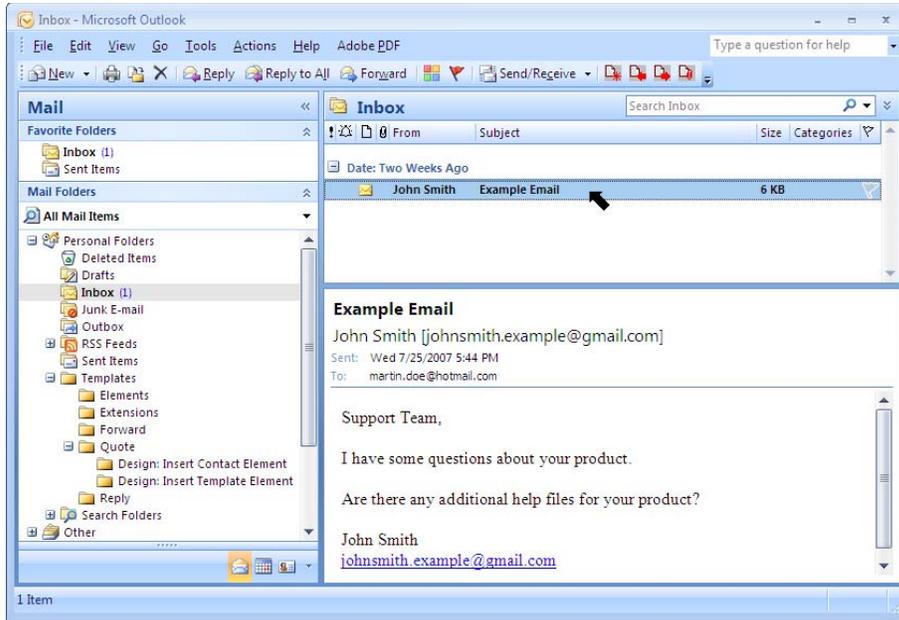
2. Select a Reply Template by clicking on the 'Reply From Template' button.

Second button activates **Reply Templates**
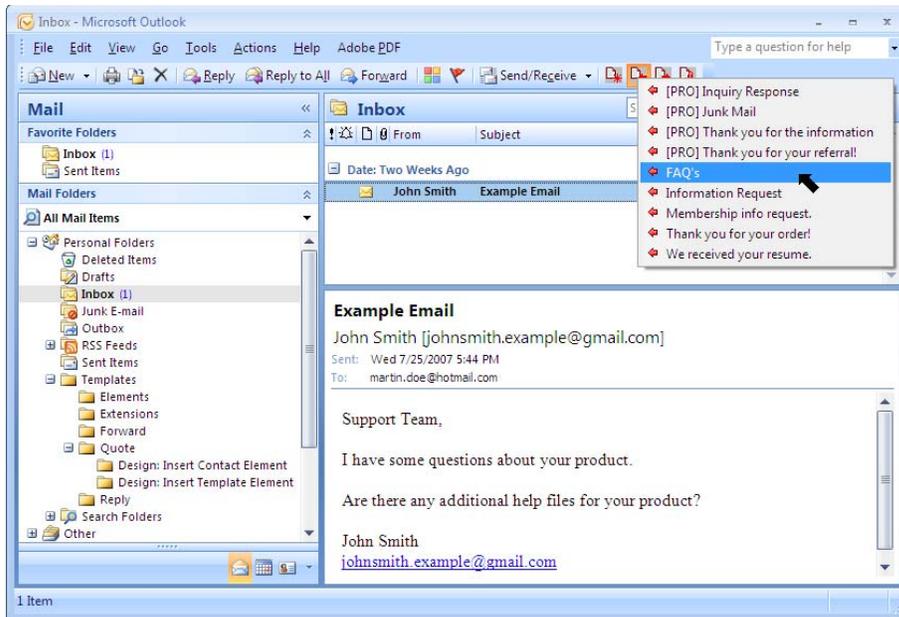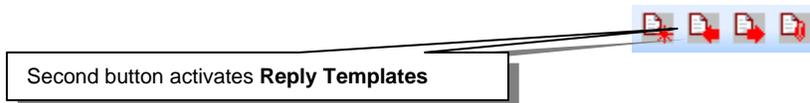
You will find this button in the standard Outlook toolbar at the top of your screen once you have downloaded and installed Email Templates™.

Alternatively, you can choose from your 'Actions' menu. Click on 'Actions', 'Email Templates', 'Reply From Template…'.
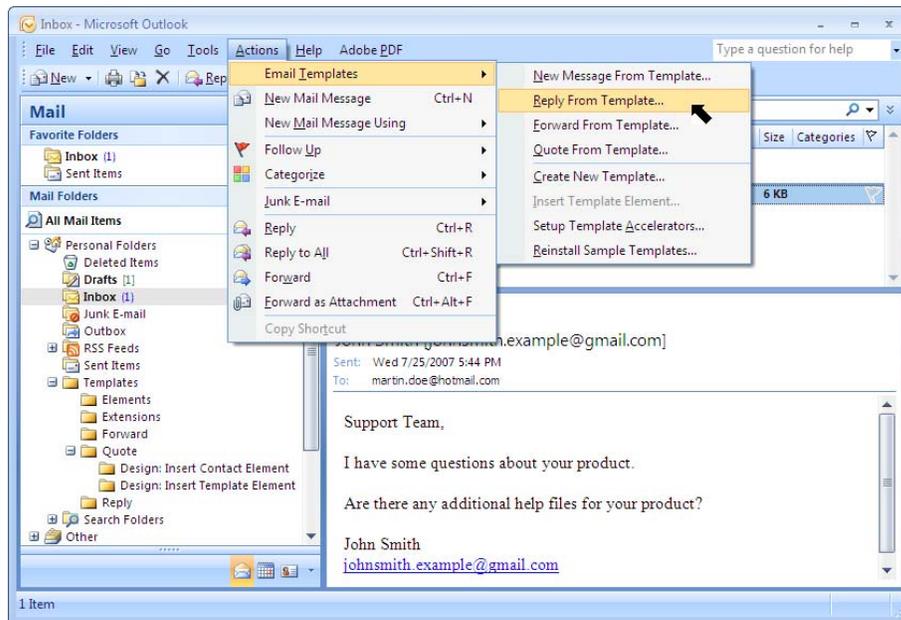
3.   Pick the template you wish to send and follow the prompts.

If you are using the 'Reply From Template' button, simply click on the message template and follow the prompts to personalize the information.

If you click on 'Actions', 'Email Templates', 'Reply From Template…', highlight the template you want to use and click 'OK'. Follow the prompts to personalize the information.
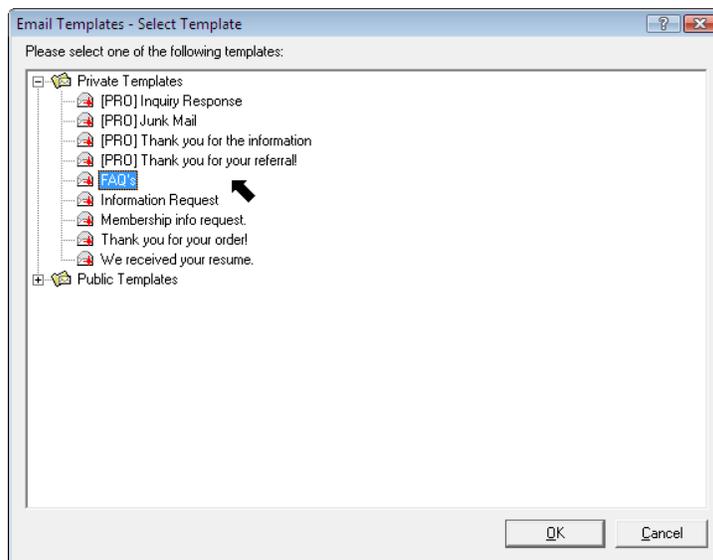
For Outlook 2007, the template buttons can also be accessed through the "Add-Ins" tab in the ribbon or through the "Toolbar Commands" button in the Quick Access Toolbar.
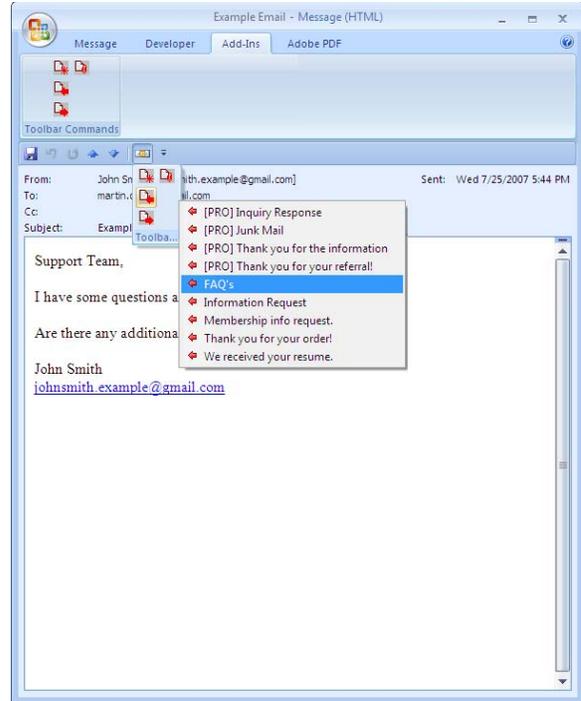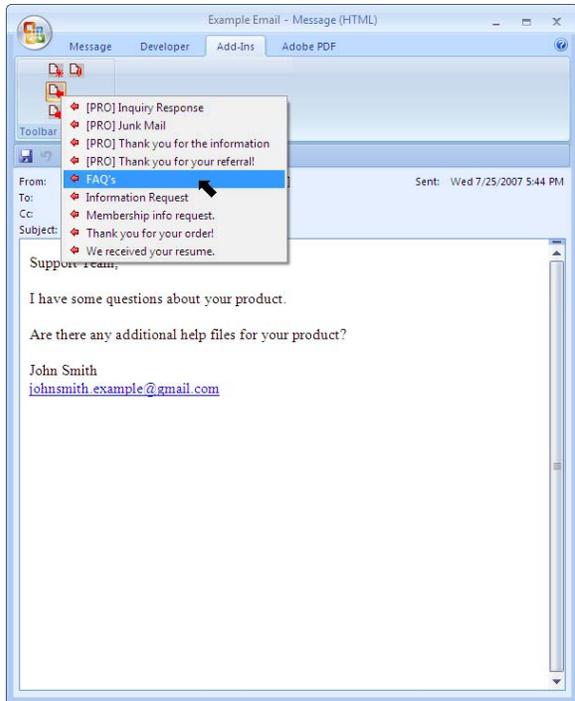
Email Templates™ will automatically insert the email address of the person you are replying to in the "TO:" section of the new mail message.

Note that the subject field contains the subject of the email you are replying to, not the name of the template you are using.
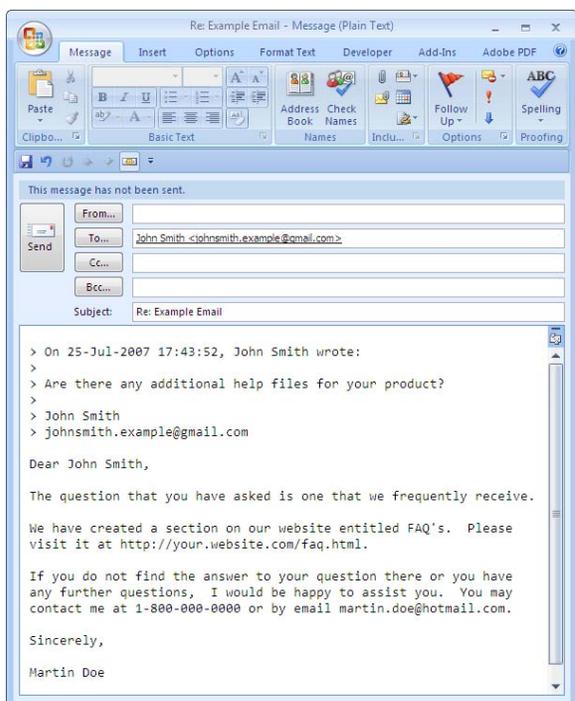
4. You can change any text within the email before sending. When finished, click 'Send'.

Editing a 'Reply From Template'

In order to send out a template that has all the personalized information you want to have in it, you must follow the following steps.

1. Go to the 'Templates' folder in your Outlook or Exchange Mailbox.

    If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

    Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

2. Look for the subfolder of Email Templates™ called 'Reply' (stored in the main 'Templates' folder).

3. Open a template by double-clicking on it. Then make changes just like you do with any other message.

4. When you are finished, click on the 'Save' button to retain your changes, and then use the template as described in the **Sending a 'Reply From Template'** section.

Example: Using a Reply Template

This is a Reply Template called "FAQ's". Please note that the subject of the email is the same as the title of the new email template.
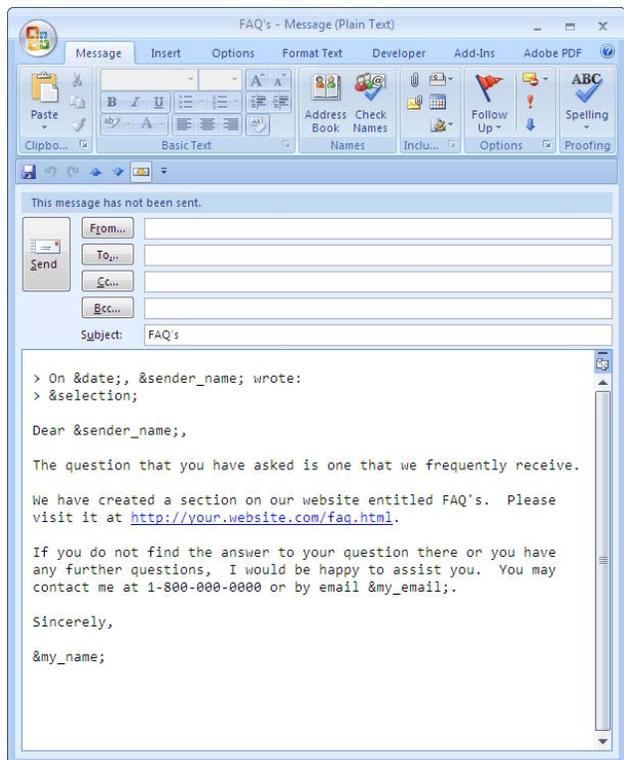
By highlighting a message in your Outlook folder, you are asking Email Templates™ to send a reply message from this template to the person who sent you the email. This template is including the previous message date, the sender's name, and the body of the email.

&date; is an element that includes the date of the email you are replying to.

&sender_name; is an element that tells the message to insert the name of the person you emailed you.

&selection; is an element that inserts the body of the email you are replying to.

&my_email; is an element that tells the message to insert your email address into the template.

&my_name; is an element that tells the message to insert your name into the template.

1. Go to the 'Templates' folder in your Outlook or Exchange Mailbox.

    If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

    Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

2. Look for the subfolder of Email Templates™ called 'Reply' for the template called "FAQ's".

3. Open the "FAQ's" template by double-clicking on it.

4. Then, make changes just like you do with any other message to personalize it. In this case, we have modified some of the information in the document; however you may modify any of the wording or add text.

    It should now look like this:
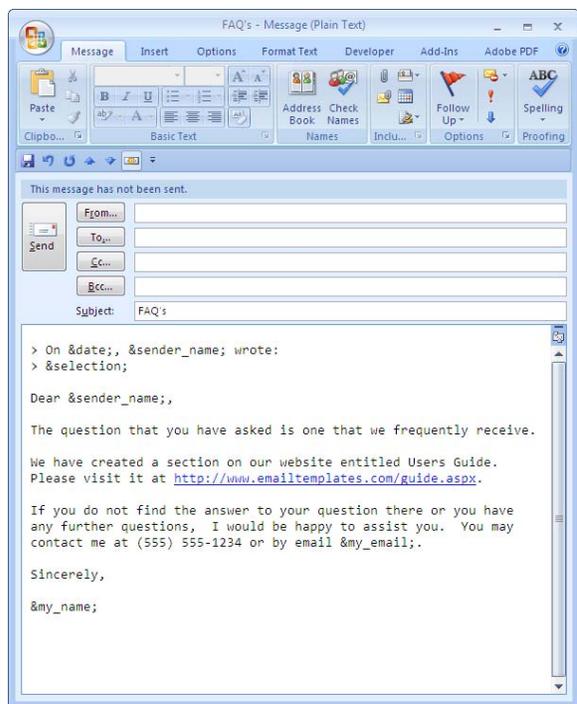
5. Now click 'Save', then exit the template.

6. Select a message from your Outlook folders by highlighting the message.

7. Select the "FAQ's" template by clicking on the 'Reply From Template' button.
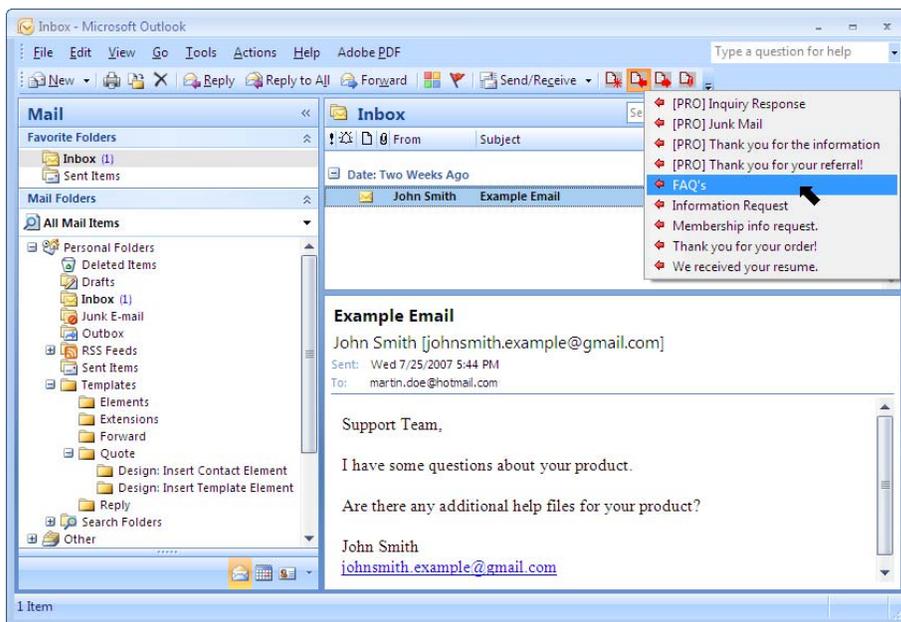
Alternatively, you can choose from your 'Actions' menu by clicking on 'Actions', 'Email Templates', 'Reply From Template…'. Pick the "FAQ's" template.

Outlook 2007 users can also access the template buttons through the "Add-Ins" tab in the ribbon or through the "Toolbar Commands" button in the Quick Access Toolbar.

8. You have now created an email message that tells John Smith that he can receive more information on Email Templates™ through the Users Guide found at www.emailtemplates.com/guide.aspx.

Note that the subject field contains the subject of the email you are replying to, not the name of the template you are using.

Creating New Email Templates

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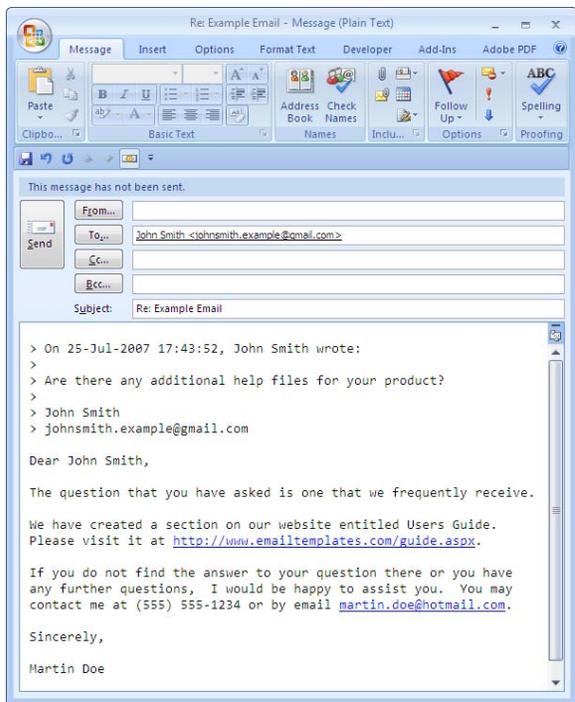
Forward Templates

Sending a 'Forward From Template'

1. Select a message from your Outlook folders by highlighting the message.
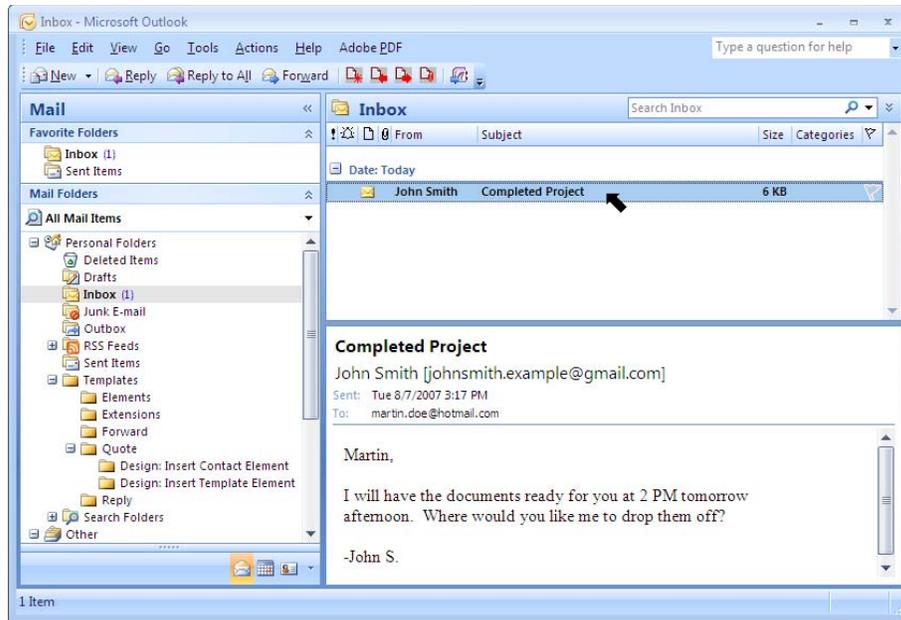
2. Select a Reply Template by clicking on the 'Forward From Template' button.

Third button activates **Forward Templates**
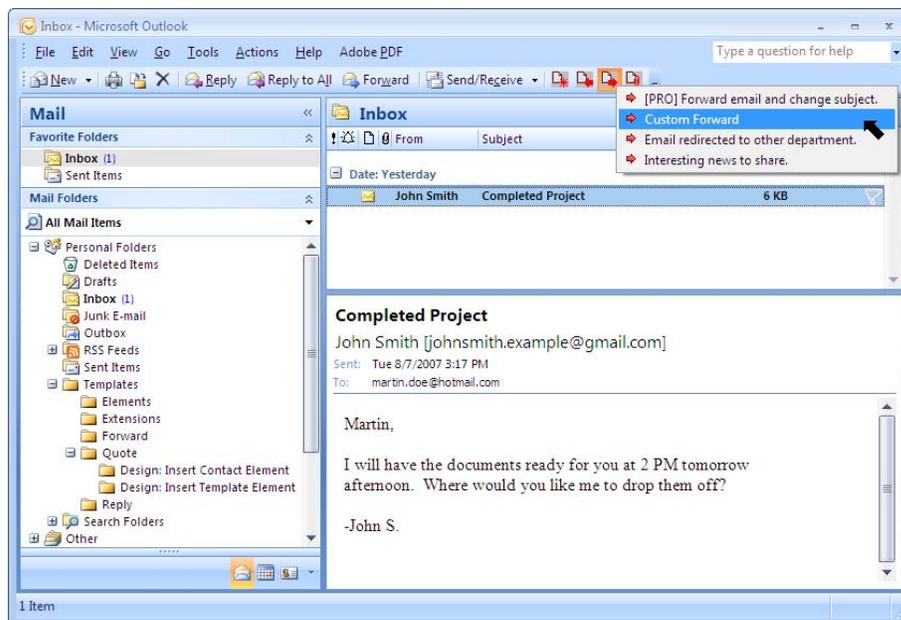
You will find this button in the standard Outlook toolbar at the top of your screen once you have downloaded and installed Email Templates™.

Alternatively, you can choose from your 'Actions' menu. Click on 'Actions', 'Email Templates', 'Forward From Template…'.
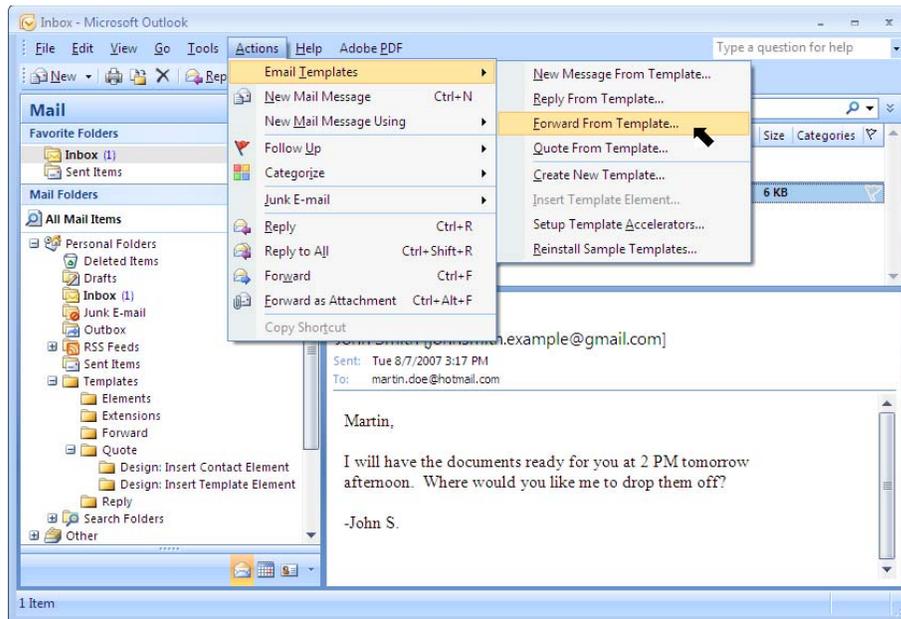
3. Pick the template you wish to send and follow the prompts.

    If you are using the 'Forward From Template' button, simply click on the message template and follow the prompts to personalize the information in the template.

    If you click on 'Actions', 'Email Templates', 'Forward From Template…', highlight the template you want to use and click 'OK'. Follow the prompts to personalize the information.

For Outlook 2007, the template buttons can also be accessed through the "Add-Ins" tab in the ribbon or through the "Toolbar Commands" button in the Quick Access Toolbar.
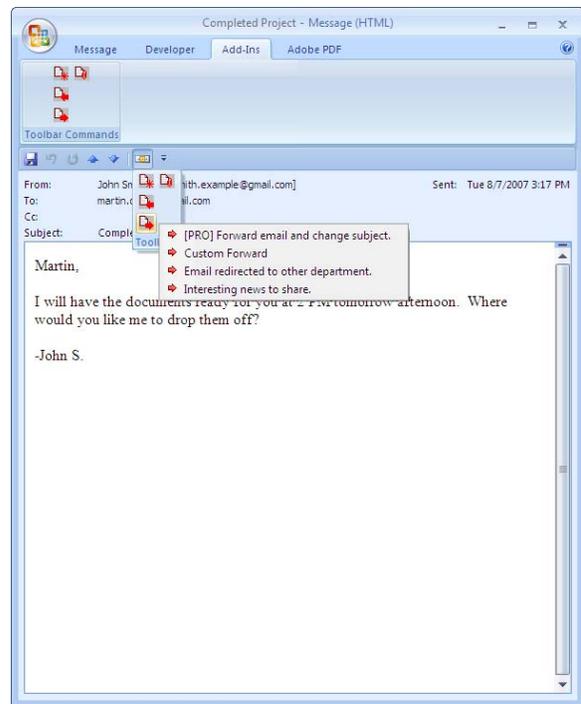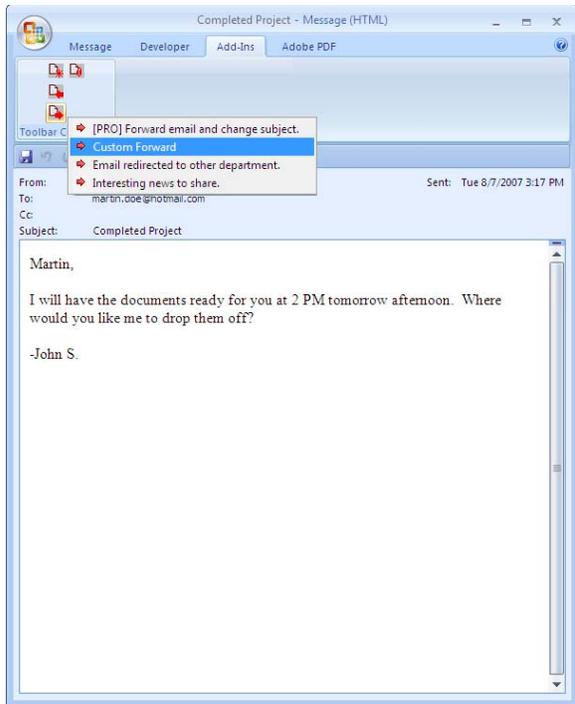
Note that the subject field contains the subject of the email you are forwarding, not the name of the template you are using.

4. You can change any text within the email before sending. When finished, click 'Send'.

Editing a 'Forward From Template'

In order to send out a template that has all the personalized information you want to have in it, you must follow the following steps.

1. Go to the 'Templates' folder in your Outlook or Exchange Mailbox.

    If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

    Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

2. Look for the subfolder of Email Templates™ called 'Forward' (stored in the main 'Templates' folder).

3. Open a template by double-clicking on it. Then make changes just like you do with any other message.

4. When you are finished, click on the 'Save' button to retain your changes, and then use the template as described in the **Sending a 'Forward From Template'** section of these Help Files.

Example: Using a Forward Template

This is a Forward Template called "Custom Forward". Please note that the subject of the email is the same as the title of the new email template.
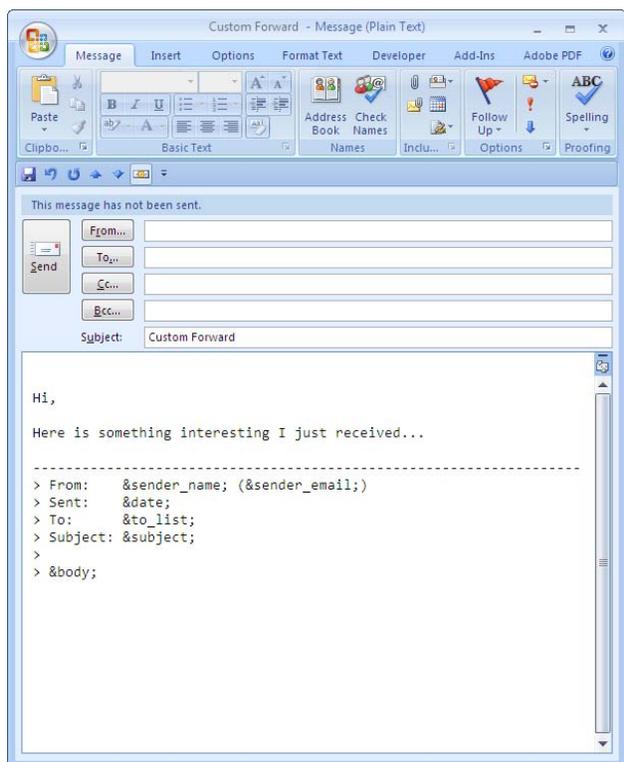
By highlighting a message in your Outlook folder, you are asking Email Templates™ to forward this message to another person.

&sender_name; is an element that tells the message to insert the name of the person you emailed you.

&sender_email; is an element that tells the message to insert the email of the person you emailed you.

&date; is an element that includes the date of the email you are replying to.

&to_list; is an element that lists all the people the email was originally sent to.

&subject; inserts the subject of the original email message.

&body; is an element that inserts the body of the message.

1. Go to the 'Templates' folder in your Outlook or Exchange Mailbox.

    If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

    Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

2. Look for the subfolder of Email Templates™ called 'Forward' for the template called "Custom Forward".

3. Open the "Custom Forward" template by double-clicking on it.

4. Then, make changes just like you do with any other message to personalize it. In this case, we have modified some of the information in the document; however you may modify any of the wording or add text.

    It should now look like this:
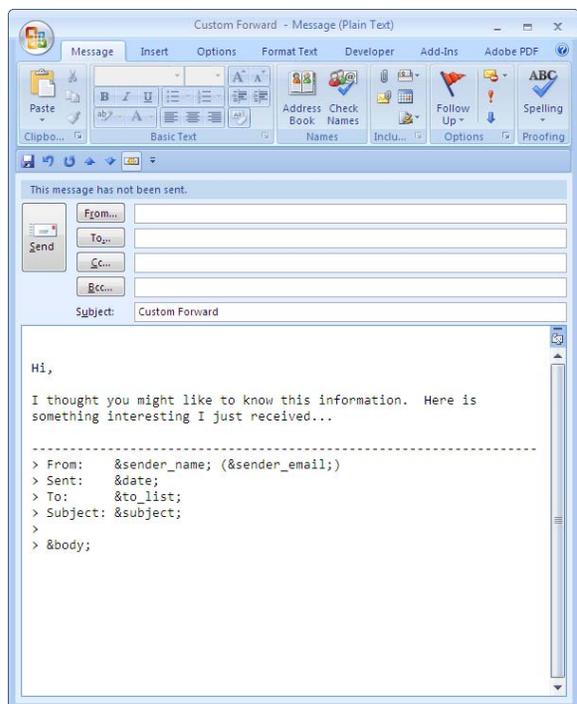
5. Now click 'Save', then exit the template.

6. Select a message from your Outlook folders by highlighting the message.

7. Select the "Custom Forward" template by clicking on the 'Forward From Template' button.
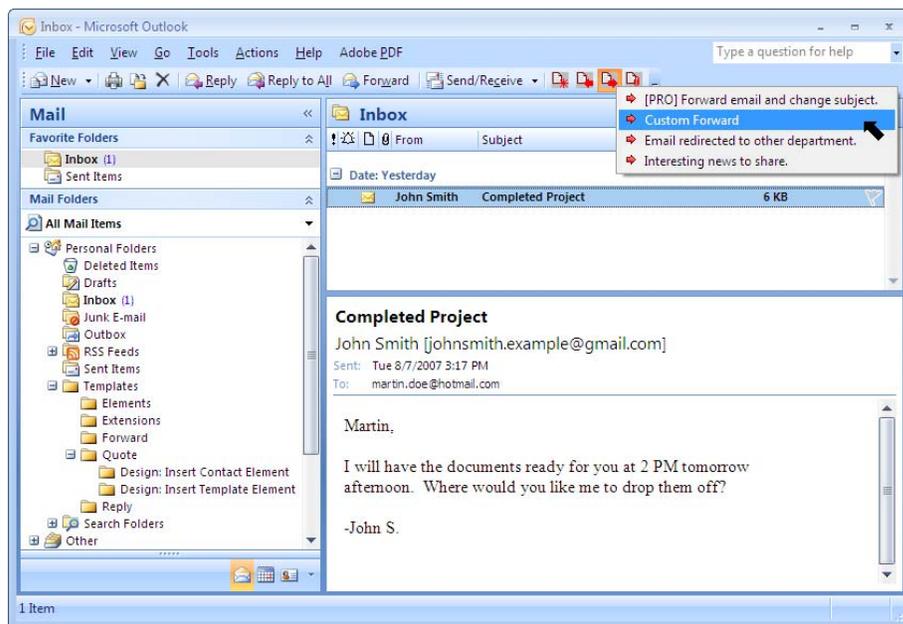

Alternatively, you can choose from your 'Actions' menu by clicking on 'Actions', 'Email Templates', 'Forward From Template…'. Pick the "Custom Forward" template.

Outlook 2007 users can also access the template buttons through the "Add-Ins" tab in the ribbon or through the "Toolbar Commands" button in the Quick Access Toolbar.

8. You have now created an email message from Martin Doe that tells Jane Smith that John Smith has completed the project and will have the information ready the following day.

Note that the subject field contains the subject of the email you are forwarding, not the name of the template you are using.
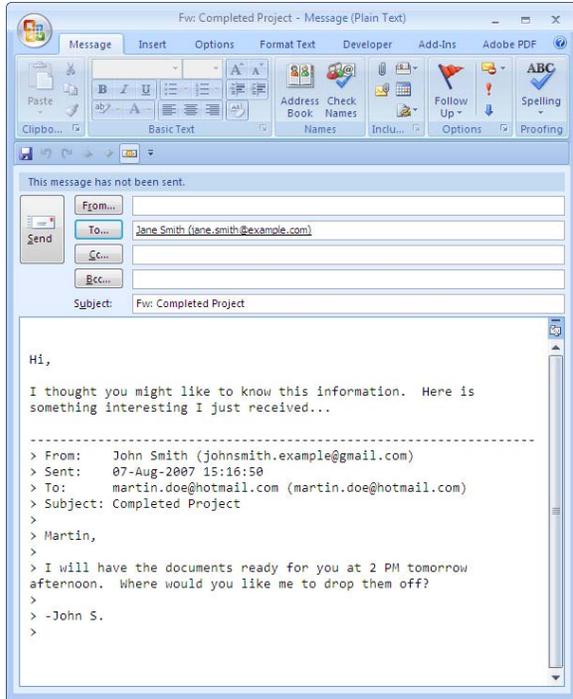
Quote Templates

Using a 'Quote From Template'

1. Begin by editing a 'Quote From Template'.

2. Go to the 'Templates' folder in your Outlook or Exchange Mailbox.

   If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

   Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

3. Look for the subfolder of Email Templates™ called 'Quote' (stored in the main 'Templates' folder).

4. Open a template by double-clicking on it. Then make changes to the text just like you do with any other message. You can also add and save attachments to the quote template. In this example, we are editing the quote template "Directions to the office".
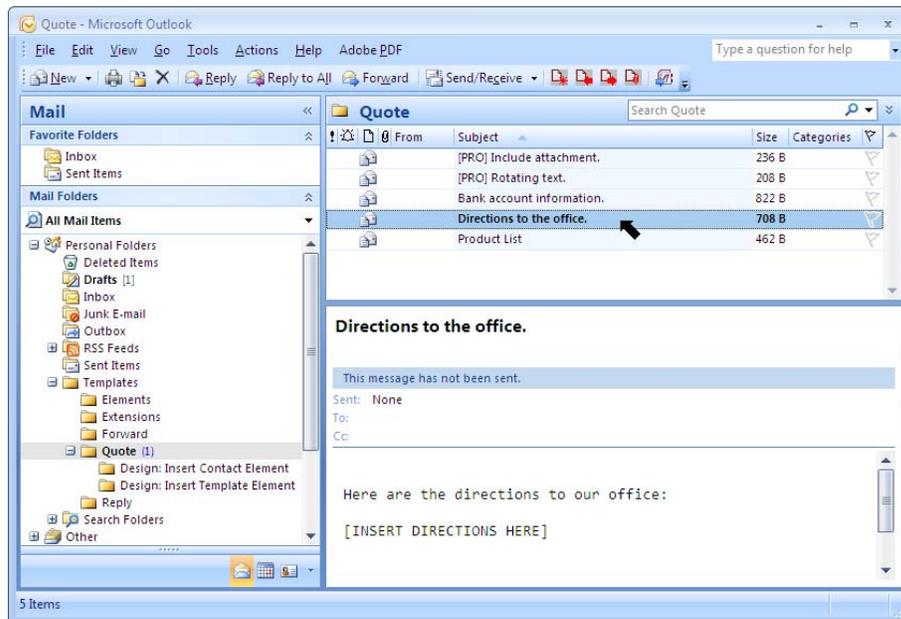
5. When you are finished editing the template, click on the 'Save' button to retain your changes and exit the template. Here is an example of some changes we made to the template:

6. Begin a new email message, reply to a message in your inbox, forward a message from your inbox, or use a New Message Template, Reply Template, or Forward Template. In this example, we are starting with a new email message:

7. Move your cursor to the point where you want to insert the information contained in the Quote Template.

Cursor where you want to insert the quote

8. Select a Quote Template by clicking on the 'Quote From Template' button in the upper right hand corner of the email.

Fourth button activates **Quote Templates**

Alternatively, you can click on 'Actions', 'Email Templates', 'Quote From Template…', select your template and click 'OK'.

For Outlook 2007, the template buttons can also be accessed through the "Add-Ins" tab in the ribbon or through the "Toolbar Commands" button in the Quick Access Toolbar.

9. The information contained in the Quote Template will automatically be inserted into the current email.

Editing a 'Quote From Template'

In order to send out a template that has all the personalized information you want to have in it, you must follow the following steps.

1. Go to the 'Templates' folder in your Outlook or Exchange Mailbox.

   If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

   Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

2. Look for the subfolder of Email Templates™ called 'Quote' (stored in the main 'Templates' folder).

3. Open a template by double-clicking on it. Then make changes just like you do with any other message.

4. When you are finished, click on the 'Save' button to retain your changes, and then use the template as described in the **Sending a 'Quote From Template'** section of these Help Files.

Example: Using a Quote Template

This is a Quote Template called "Directions to the office."
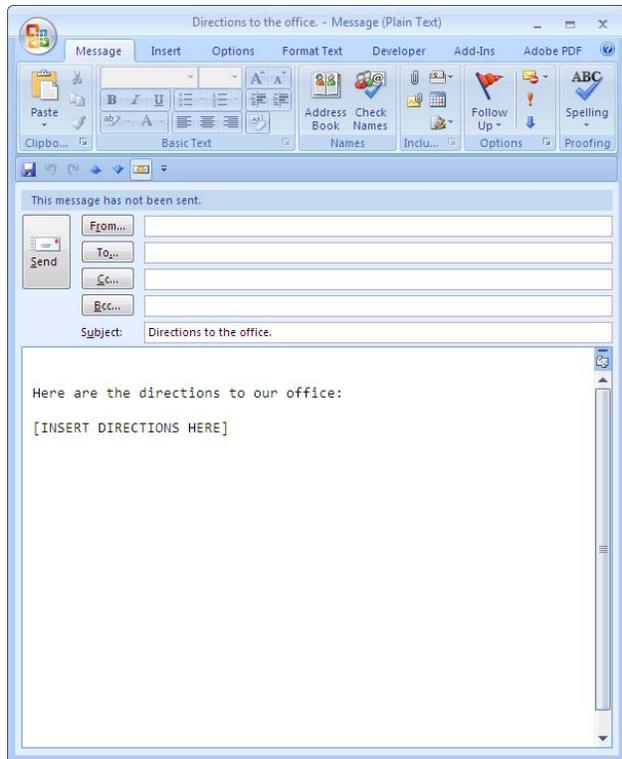
Email Templates™ will insert the body of this text into your current email.

1. Go to the 'Templates' folder in your Outlook or Exchange Mailbox.

    If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

    Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

2. Look for the subfolder of Email Templates™ called 'Quote' for the template called "Directions to the office."

3. Open the "Directions to the office." template by double-clicking on it.

4. Then, make changes just like you do with any other message to personalize it. In this case, you would insert the directions to your office in the space provided.

    It should now look like this:
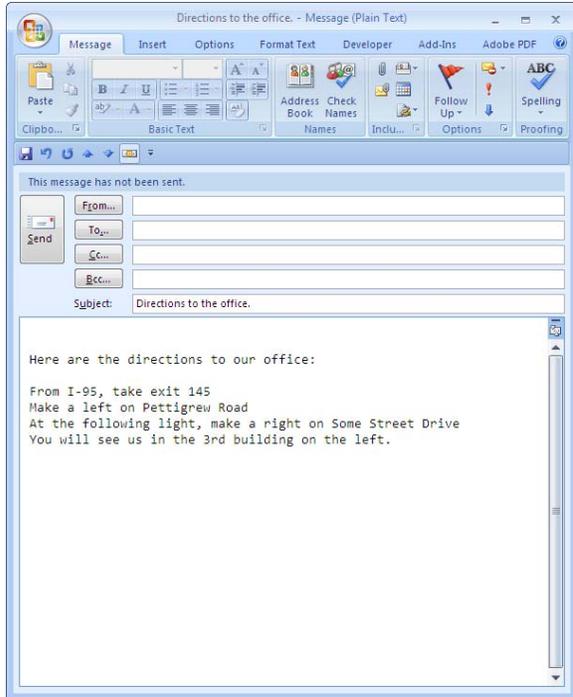
Please note that these are example directions, not actual directions.

5. Now click 'Save', then exit the template.

6. Begin a new email message, reply to a message in your inbox, forward a message from your inbox, or use a New Message Template, Reply Template, or Forward Template. In this example, we are starting with a new email message:
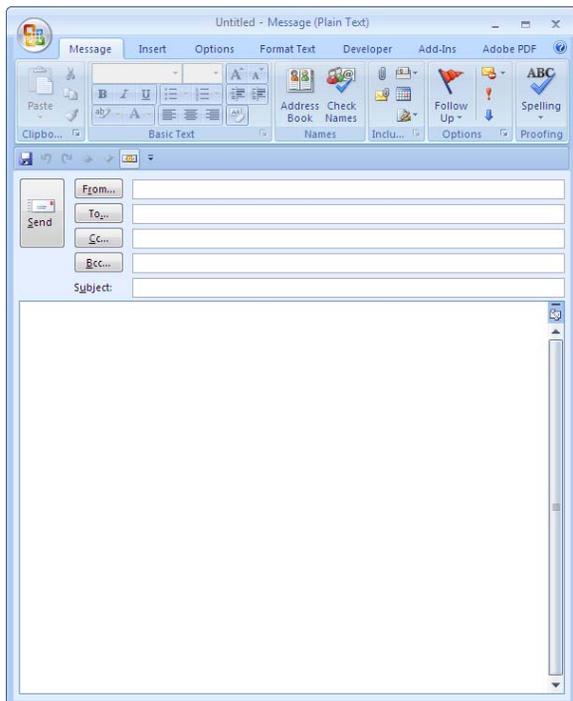
7. Move your cursor to the point where you want to insert the information contained in the Quote Template.
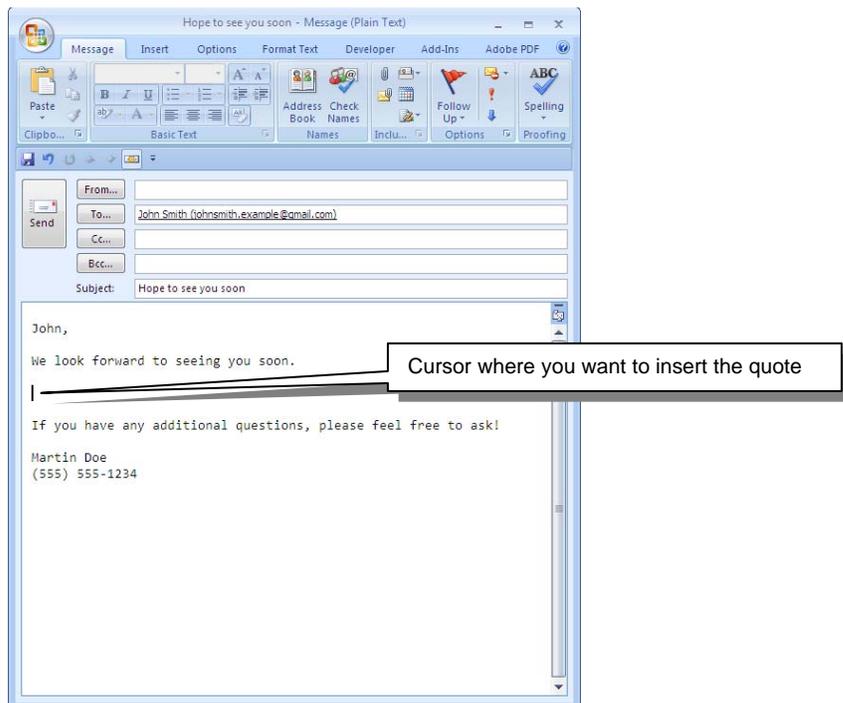
8. Select a Quote Template by clicking on the 'Quote From Template' button in the upper right hand corner of the email.

Alternatively, you can click on 'Actions', 'Email Templates', 'Quote From Template…', select your template and click 'OK'.

For Outlook 2007, the template buttons can also be accessed through the "Add-Ins" tab in the ribbon or through the "Toolbar Commands" button in the Quick Access Toolbar.

9. The information contained in the Quote Template will automatically be inserted into the current email.
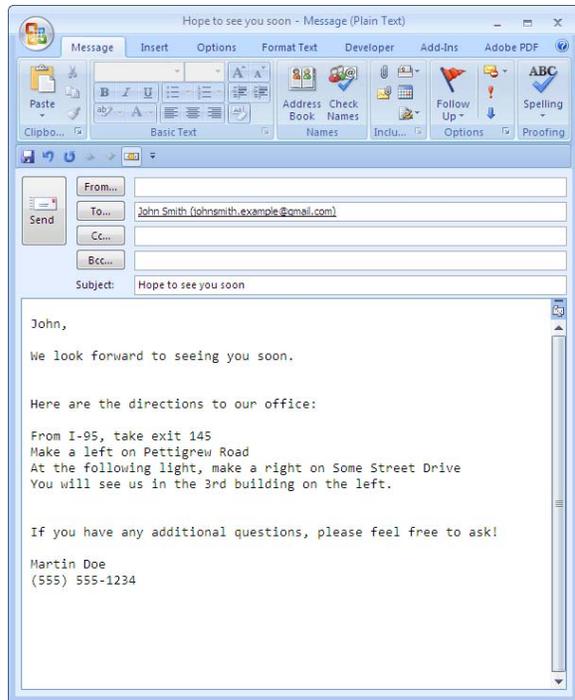
10. Finish your email and press 'Send'.

Creating New Email Templates™

New templates are easy to create with Email Templates™.

You will also find a selection of Sample Templates included with your Email Templates™ installation. You may use these templates as they are, or customize them to your needs. For more information on the Sample Templates, please refer to the **Using the Templates** section of this Help File.

There are two ways to create a New Email Template:

1. The first method uses the 'Create New Template…' command under the 'Actions' menu.
2. In the second method, a new email is created and dropped into the appropriate 'Templates' folder.

Create a New Email Template Using the 'Create New Template…' Command

1. Select the 'Create New Template…' command. To do this, click on 'Actions', 'Email Templates', 'Create New Template…'.
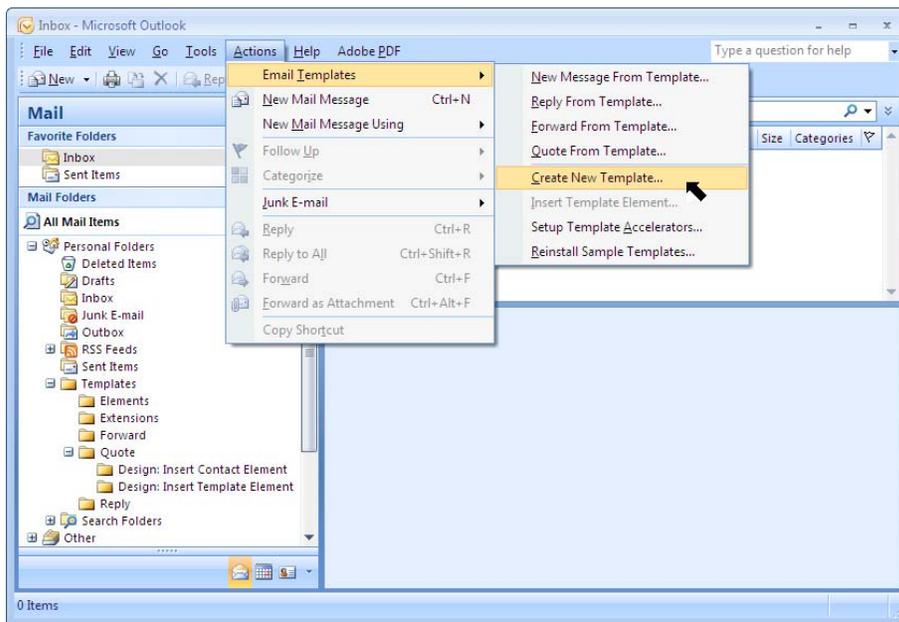
2. Type in the title for your new template. The title of the template is the same as its subject.

    Make sure that the appropriate message template button has been selected.

For a 'New Message Template':	'New Message Template' button needs to be selected.
For a 'Reply Template':	'Reply Template' button needs to be selected.
For a 'Forward Template':	'Forward Template' button needs to be selected.
For a 'Quote Template':	'Quote Template' button needs to be selected.
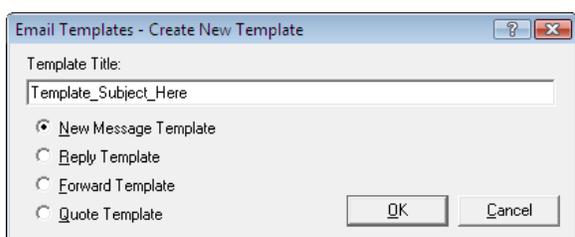
3. Click 'OK' and a new email message will appear with the title for your template in the subject line.

4. Personalize the email. Be sure to include any Elements you want Outlook to automatically insert into your email.

   For more information on how to include Elements in your template, please refer to the **How do I use elements?** section of these Help Files.
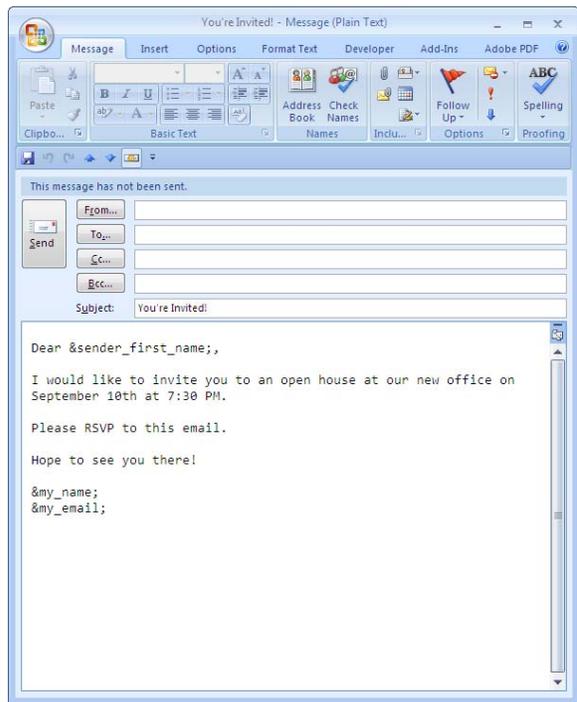
   In this email called "You're Invited!", I have created a template that will insert the contact's first name and add a personal signature.

   To find out how to set up a Signature Element, please refer to the **Example: Adding a New Customized Element** section of these Help Files.

5. Click 'Save' and close the template you just created.

   Depending on which button you selected when you created your new template in step 2:

For a 'New Message Template':	Your template will be placed in the main 'Templates' folder in your Outlook or Exchange Mailbox.
For a 'Reply Template':	Your template will be placed in the 'Reply' folder found in a subfolder of Email Templates™ (stored in the main 'Templates' folder).
For a 'Forward Template':	Your template will be placed in the 'Forward' folder found in a subfolder of Email Templates™ (stored in the main 'Templates' folder).
For a 'Quote Template':	Your template will be placed in the 'Quote' folder found in a subfolder of Email Templates™ (stored in the main 'Templates' folder).

If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

6. Now use the template just as you would with any other template. Please see the **Using the Templates** section of these Help Files for more information.

Create a New Message Template by Using a New Email Message

1. To create a New Message Template, open a new email by
    –   Clicking on 'New', 'Mail Message', or
    –   Clicking on 'File', 'New', 'Mail Message', or
    –   Typing 'CTRL' + 'N' on your keyboard.

2. In the subject line, type in the title for your new template. The title of the template is the same as its subject.

3. Personalize the email. Be sure to include any Elements you wish want Outlook to insert.

    For more information on how to include Elements in your template, please refer to the **How do I use elements?** section of these Help Files.
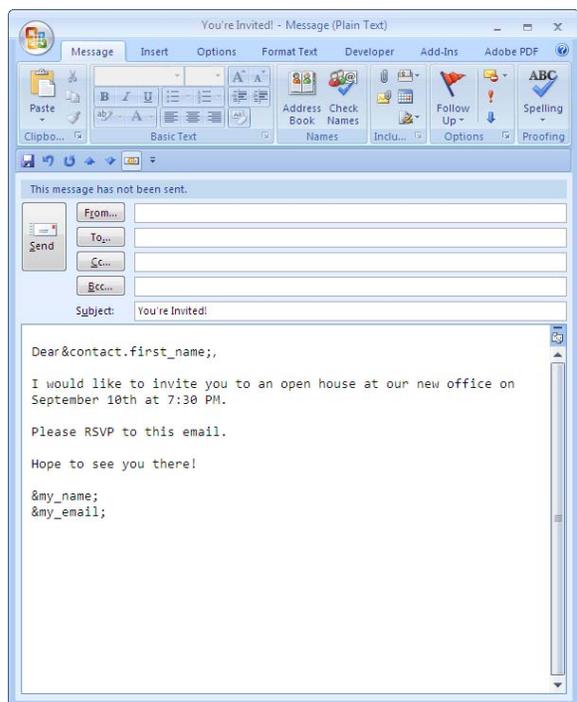
In this email called "You're Invited!", I have created a template that will insert the contact's first name and add my personal signature.

To find out how to set up a Signature Element, please refer to the **Example: Adding a New Customized Element** section of these Help Files.

4. Click 'Save' and close the template you just created and close the window.

5. Go to the 'Drafts' folder in your Outlook or Exchange Mailbox.

   If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'.

   Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'.
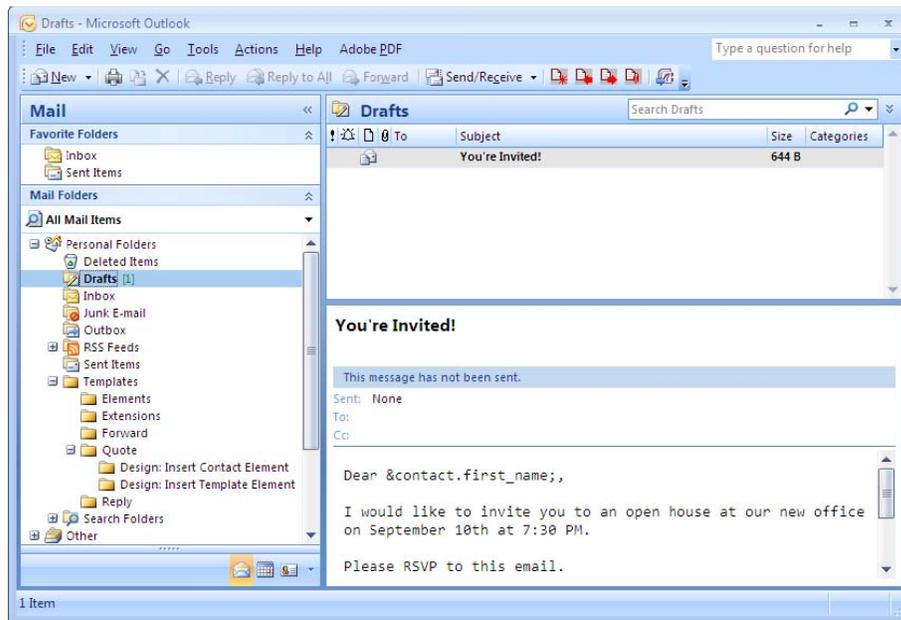
6. Highlight the mail message that is your new email template.

7. Click and hold down your left mouse button on the new element email.

8. Drag the new email over to the appropriate folder depending on what type of email template you are creating.

For a 'New Message Template':	Drag your template to the main 'Templates' folder in your Outlook or Exchange Mailbox.
For a 'Reply Template':	Drag your template to the 'Reply' folder found in a subfolder of Email Templates™ (stored in the main 'Templates' folder).
For a 'Forward Template':	Drag your template to the 'Forward' folder found in a subfolder of Email Templates™ (stored in the main 'Templates' folder).
For a 'Quote Template':	Drag your template to the 'Quote' folder found in a subfolder of Email Templates™ (stored in the main 'Templates' folder).

Look for the appropriate folder in your Outlook or Exchange Mailbox.

If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

Your new element email should now be in the appropriate folder.

9. Now use the template just as you would with any other template. Please see the **Using the Templates** section of these Help Files for more information.

Elements

In order to create your own templates, it is important to understand how to use Template Elements and the role they play in creating a template.

What is an element?

A Template Element is a placeholder for customized text, which can be inserted into a template.

Elements are similar to a Mail Merge field in a Microsoft Word document. They correspond to an attribute of a selected message or contact. When the template is applied, the elements are substituted with the value of the attribute (such as, for example, the sender's name).

The following are a few examples of Template Elements:

&date;
&my_email;
&subject;
&sender_first_name;

When you view the templates in the Template Folder, elements are shown as &element;. The element is preceded by an ampersand (&) and followed by a semicolon (;).

Template Elements are not allowed to have any spaces in them. The spaces between words have been replaced by '_' (underscores).

Template Elements will place the text in your message using the same format you used when you created the template. For example, if you create the template and the &element; is bold, the text placed by the element in your message will also appear in bold type.

There are many standard Template Elements that are available as part of Email Templates™. The customized text for these elements comes from different parts of an email message such as the email address, subject, or body. Using these elements provides a way to access the text from a particular part of an email message and place it automatically into the new message you are creating.

Template Elements are used in the creation of a template in order to insert customized text such as date, time, sender name, sender email address, recipient name, recipient email address, subject of the message, text from another message, etc.

How do I use elements?

Using Standard Elements

1. When you are creating or editing a template, place your cursor where you want a Template Element to appear.

2. Select a Template Element by clicking on the 'Quote From Template' button, and highlighting 'Insert Template Element'.

Fourth button activates **Quote Templates**

Alternatively, you can click on 'Actions', 'Email Templates', 'Insert Template Element…'. Highlight the template you want to use and click 'OK'. Follow the prompts to personalize the information.

Outlook 2007 users can also access the template buttons through the "Add-Ins" tab in the ribbon or through the "Toolbar Commands" button in the Quick Access Toolbar.

The Template Element appears on the left side of the list. On the right side of the list is a description of what the Template Element will automatically place in the template when the template is used.

3. Select the Template Element you wish to use and click OK.

4. The Template Element you click on will automatically be placed in the template you are creating or editing in the place where your cursor is. Later, when you use the template to send a message, the assigned content for that element will automatically be placed in the created message.

    NOTE: You may also type the name of the template element directly into the message. If you choose to do this, please be careful to spell the element correctly, and to include the '&' and ';' before and after the element name.

5. Click 'Save'.

6. Now use the template you just created. Please see **Using the Templates** section of these Help Files.

Using Contact Elements

Contact Elements will pull information from your Outlook contact list and insert it into your email.

1. When you are creating or editing a template, place your cursor where you want a Contact Element to appear.

2. Select a Template Element by clicking on the 'Quote From Template' button, and highlighting 'Insert Contact Element'.

Fourth button activates **Quote Templates**

3. Select the Template Element you wish to use and click OK.

4. The Template Element you click on will automatically be placed in the template you are creating or editing in the place where your cursor is. Later, when you use the template to send a message, the assigned content for that element will automatically be placed in the created message.

    NOTE: You may also type the name of the template element directly into the message. If you choose to do this, please be careful to spell the element correctly, and to include the '&' and ';' before and after the element name.

5. Click 'Save'.

6. Open your contacts list found in your Outlook Folder.

7. Highlight the contact or contacts you wish to send your template to.

8. Select a Template Element by clicking on one of the Email Templates™ Buttons on the Outlook Toolbar, and highlighting the template you want to use.

9. Outlook will now use the template information and pull the contact information from the selected Outlook contacts.

   Outlook will show you all of the emails before you decide to press 'Send'. You can edit them individually, or, if you do not want to see a preview of the messages, press 'Shift' before step 8, then proceed with step 8 and the messages will be automatically sent out.

Example: Using a Contact Element

This example will use the template called "Contracts Awarded".

1. Open a template where you want to add or change the information contained in the template.

   To open the template, go to the 'Templates' folder in your Outlook or Exchange Mailbox.

   If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

   Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

   Look for the main folder of the Email Templates™ called 'Templates'.

   Open the "Contracts Awarded" template by double-clicking on it.
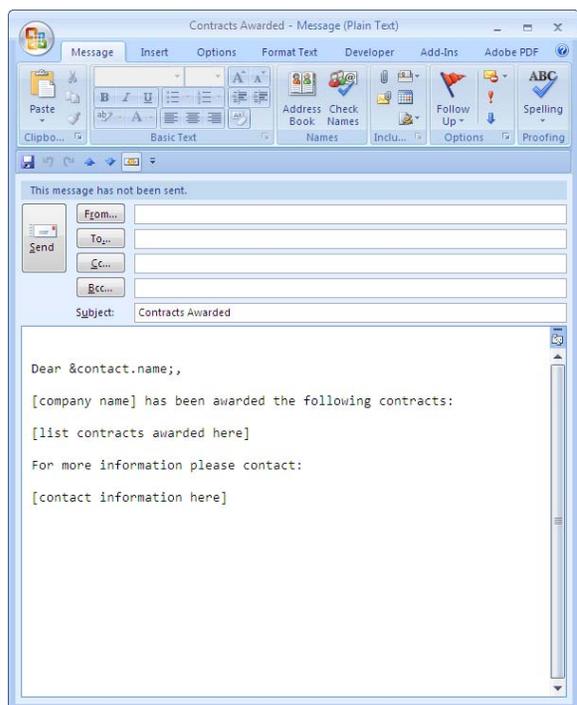
2. When you are creating or editing a template, place your cursor where you want a Contact Element to appear.

In this case, I will change [list contracts awarded here] and [contact information here] to personalize this information. I will change [Company Name] to our company name, so I can send the same email to several companies who were all awarded the same contact. I will also add a line asking the person to review their contact information to make sure that I have the most current information on file.

There are two ways to add the elements that I want to add. I can either type them in being careful to spell the element correctly, and to include the '&' and ';' before and after the element name.

```
&contact.company;
&contact.business_address; (includes city, state, postal code)
&contact.business_address_country;
&contact.business_phone;
&contact.business_fax;
```

Or, I can insert them by select a Template Element by clicking on the 'Quote From Template' button, and highlighting 'Insert Contact Element'. Then, I highlight any contact element I wish to add.
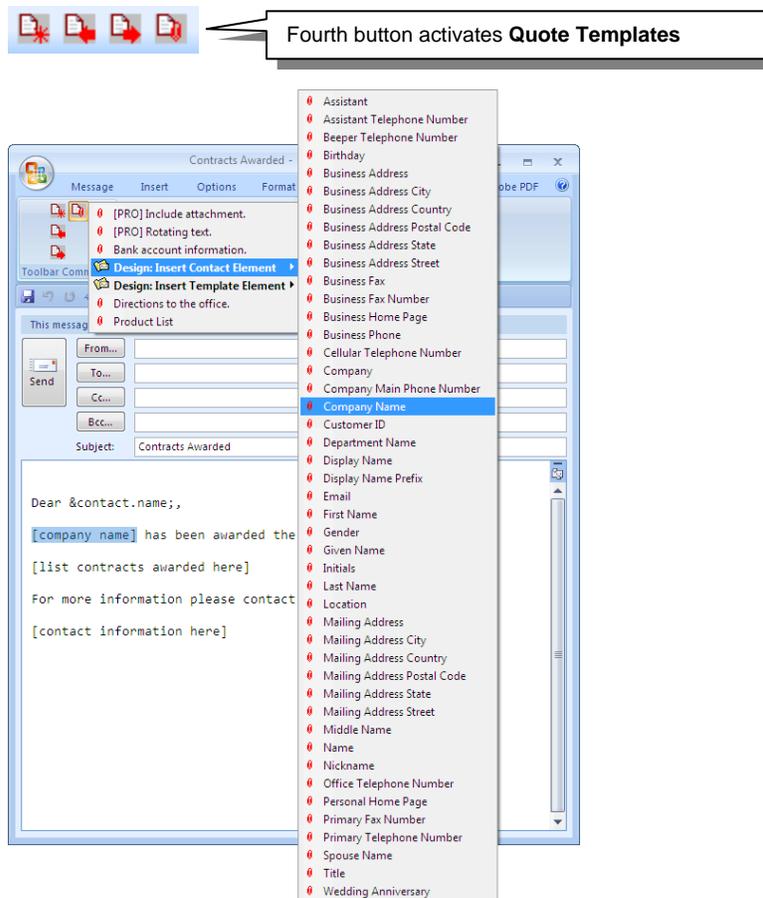
My template will now look like this:
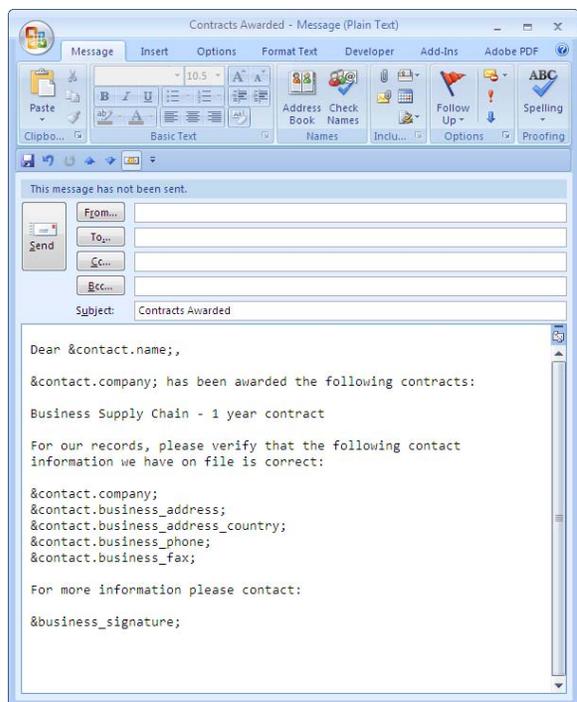
Elements

The Template Element you click on will automatically be placed in the template you are creating or editing in the place where your cursor is. Later, when you use the template to send a message, the assigned content for that element will automatically be placed in the created message.

3. When you are finished, click on the 'Save' button to retain your changes.

4. Open the Contacts List found in the Outlook Folder.

5. Highlight the contact or contacts you wish to send your email template to.

6. Select the "Contracts Awarded" template by clicking on the 'New Message From Template' Button on the Outlook Toolbar and highlighting the "Contracts Awarded" template.

First button activates **New Message Templates**

Alternatively, you can choose from your 'Actions' menu. Click on 'Actions', 'Email Templates', 'New Message From Template…' and "Contracts Awarded".

7. Outlook will now use the template information and pull the contact information from the selected Outlook contacts.

Outlook will show you all of the emails before you decide to press 'Send'. You can edit them individually, or, if you do not want to see a preview of the messages, press 'Shift' before step 8, then proceed with step 8 and the messages will be automatically sent out.

When the information is pulled together from your contact list, your email will now look like this:

8.   When you are satisfied with the email, press 'Send'.

Element List

<u>Standard Elements</u>

The Template Elements are what allow you to customize your message templates to read and function quickly, with minimal typing. The following is a list of the elements provided to you with the current version of Email Templates™. More will be available in future versions. You may also add new elements through Email Templates™ Extensions or Scripts.

The following Template Elements may be used in templates. They refer to the original message to which the template is being applied. These elements are provided with Email Templates™.

<u>Standard Element</u>	<u>Description</u>
&subject;	The subject of the message. Taken from the subject line in the address header.
&body;	The body of the message. Any text before &body; and in the same line with it, is prepended to every line of the message text.
&sender;	The name and email of the sender of the message.
&sender_name;	The full name of the sender of the message.
&sender_first_name;	The first name of the sender of the message.
&email;	The email of the sender of the message.

&sender_email;	The email of the sender of the message. This is the same as &email;.
&selection;	The current selection or highlighted text on the message. If there is no selection, or if the message is not open, the whole body of the message is returned.
&date;	The time the message was sent.
&submit_time;	The time the message was submitted.
&delivery_time;	The time the message was delivered.
&to_list;	The list of direct recipients of the message, the 'To:' recipients. The list includes both names and emails, separated by a semicolon, ';'.
&cc_list;	The list of carbon-copy recipients of the message, the 'Cc:' recipients. The list includes both names and emails, separated by a semicolon, ';'.
&to_email_list;	The list of email addresses of direct recipients of the message, the 'To:' recipients. The list elements are separated by a semicolon, ';'.
&cc_email_list;	The list of email addresses of carbon-copy recipients of the message, the 'Cc:' recipients. The list elements are separated by a semicolon, ';'.
&to_name_list;	The list of names of direct recipients of the message, the 'To:' recipients. The list elements are separated by a semicolon, ';'.
&cc_name_list;	The list of names of carbon-copy recipients of the message, the 'Cc:' recipients. The list elements are separated by a semicolon, ';'.
&input.value;	Presents an input dialog for value. Value may be replaced with meaningful text, like 'Your_Name', but it may not contain any spaces. The text entered is substituted in the message.
&my_name;	The full name for the current profile or account. This is the default account for Outlook or the screen name for Exchange.
&my_email;	The email address of the current profile or account. This is the default account for Outlook or screen name for Exchange.
&internet_headers;	The full SMTP envelope of the message if it is coming from the Internet. Empty string otherwise.
&clipboard;	The contents of the clipboard at the moment the message is created.
&eid;	The message entry id as defined by MAPI. See the Advanced Programming section for more details.
&proplist;	The list of MAPI properties for the selected object. Returned as a list of hexadecimal numbers.
&repeat_index;	The index of the current message in a repeat loop. See the &repeat; element below for further details.

&repeat.count;   This element is used to repeat evaluating the current template count number of times. This is useful for sending the same template to a mailing list, for example.

&sel_index;   The index of the message or contact being processed in a multi-message or multi-contact selection.

&sel_count;   The total number of messages or contacts selected in a multi-message or multi-contact selection.

&attachment_list;   The list of attachment names as file names separated by spaces.

&attachment.index;   The attachment at index starting from 0.

&attachments;   This transfers the attachments in the message to the new message created by the template. Note that any attachments included in the template will be replaced.

Contact Elements

New Message Templates may also be activated based on Outlook Contacts. You may select one or more contacts, and then activate a template through the popup menu. The result will be one or more messages directed to the contacts you selected. If the template contains Contact Elements (placeholders for a contact's address, phone number, etc.), these elements will be substituted with the corresponding values for the contact, thus creating a personalized message to each contact.

If a contact is selected, it returns property from the list of contact properties , e.g. &contact.first_name;, or nothing, if the property is missing.

This is a list of Contact Elements.

Contact Element	Description
&contact.property;	If a contact is selected, it returns property from the list of contact properties , e.g. &contact.first_name;, or nothing, if the property is missing. The list of properties includes the following - in alphabetic order:
&contact.account;	Contact Account.
&contact.assistant;	Contact Assistant.
&contact.assistant_telephone_number;	Contact Assistant Telephone Number.
&contact.beeper_telephone_number;	Contact Beeper Telephone Number.
&contact.birthday;	Contact Birthday.
&contact.business_address;	Contact Business Address.
&contact.business_address_city;	Contact Business Address City.
&contact.business_address_country;	Contact Business Address Country.
&contact.business_address_postal_code;	Contact Business Address Postal Code.
&contact.business_address_state;	Contact Business Address State.

&contact.business_address_street;	Contact Business Address Street.
&contact.business_fax;	Contact Business Fax.
&contact.business_fax_number;	Contact Business Fax Number.
&contact.business_home_page;	Contact Business Home Page.
&contact.business_phone;	Contact Business Phone.
&contact.callback_telephone_number;	Contact Callback Telephone Number.
&contact.car_telephone_number;	Contact Car Telephone Number.
&contact.cellular_telephone_number;	Contact Cellular Telephone Number.
&contact.company;	Contact Company.
&contact.company_main_phone_number;	Contact Company Main Phone Number.
&contact.company_name;	Contact Company Name.
&contact.computer_network_name;	Contact Computer Network Name.
&contact.creation_time;	Contact Creation Time.
&contact.customer_id;	Contact Customer ID.
&contact.department_name;	Contact Department Name.
&contact.display_name;	Contact Display Name.
&contact.display_name_prefix;	Contact Display Name Prefix.
&contact.email;	Contact Email.
&contact.first_name;	Contact First Name.
&contact.ftp_site;	Contact FTP Site.
&contact.gender;	Contact Gender.
&contact.generation;	Contact Generation.
&contact.given_name;	Contact Given Name.
&contact.government_id_number;	Contact Government ID Number.
&contact.hobbies;	Contact Hobbies.
&contact.home_address_city;	Contact Home Address City.
&contact.home_address_country;	Contact Home Address Country.
&contact.home_address_post_office_box;	Contact Home Address Post Office Box.
&contact.home_address_postal_code;	Contact Home Address Postal Code.
&contact.home_address_state;	Contact Home Address State.
&contact.home_address_street;	Contact Home Address Street.
&contact.home_fax_number;	Contact Home Fax Number.
&contact.home_telephone_number;	Contact Home Telephone Number.
&contact.home2_telephone_number;	Contact Home2 Telephone Number.
&contact.initials;	Contact Initials.
&contact.isdn_number;	Contact ISDN Number.
&contact.keyword;	Contact Keyword.
&contact.language;	Contact Language.

&contact.last_modification_time;	Contact Last Modification Time.
&contact.last_name;	Contact Last Name.
&contact.location;	Contact Location.
&contact.mailing_address;	Contact Mailing Address.
&contact.mailing_address_city;	Contact Mailing Address City.
&contact.mailing_address_country;	Contact Mailing Address Country.
&contact.mailing_address_postal_code;	Contact Mailing Address Postal Code.
&contact.mailing_address_state;	Contact Mailing Address State.
&contact.mailing_address_street;	Contact Mailing Address Street.
&contact.managers_name;	Contact Managers Name.
&contact.middle_name;	Contact Middle Name.
&contact.name;	Contact Name.
&contact.nickname;	Contact Nickname.
&contact.office_location;	Contact Office Location.
&contact.office_telephone_number;	Contact Office Telephone Number.
&contact.office2_telephone_number;	Contact Office2 Telephone Number.
&contact.organizational_id_number;	Contact Organizational ID Number.
&contact.other_address_city;	Contact Other Address City.
&contact.other_address_country;	Contact Other Address Country.
&contact.other_address_post_office_box;	Contact Other Address Post Office Box.
&contact.other_address_postal_code;	Contact Other Address Postal Code.
&contact.other_address_state;	Contact Other Address State.
&contact.other_address_street;	Contact Other Address Street.
&contact.other_telephone_number;	Contact Other Telephone Number.
&contact.personal_home_page;	Contact Personal Home Page.
&contact.postal_address;	Contact Postal Address.
&contact.primary_fax_number;	Contact Primary Fax Number.
&contact.primary_telephone_number;	Contact Primary Telephone Number.
&contact.profession;	Contact Profession.
&contact.radio_telephone_number;	Contact Radio Telephone Number.
&contact.referred_by_name;	Contact Referred by Name.
&contact.spouse_name;	Contact Spouse Name.
&contact.surname;	Contact Surname.
&contact.telex_number;	Contact Telex Number.
&contact.title;	Contact Title.
&contact.ttytdd_phone_number;	Contact TTYTDD Phone Number.
&contact.wedding_anniversary;	Contact Wedding Anniversary.

Creating Customized Elements

You can create your own customized element and each element would have a file of its own.

The format for creating a customized element is:

Subject line   =   Name of Element

Body of email   =   Text The text you want Email Templates™ to insert at the element.

Creating a New Customized Element

The benefit of creating customized elements is that if you need to change any of the information, you only need to change it once and not on every email template you have created.

1. To create a new Customized Element, open a new email by
    –   Clicking on 'New', 'Mail Message', or
    –   Clicking on 'File', 'New', 'Mail Message', or
    –   Typing 'CTRL' + 'N' on your keyboard.

2. Type the name of the new element into the subject line of your email. *Note: You cannot have a space in the subject line!

3. In the body of the email, type whatever information you want to be inserted as part of the element. Any time you use this element in your template, it will paste this information directly into your template.

    It is important to note that New_Element_That_Does_Something is what you are going to call this element. It cannot have spaces, so underscores (_) have been added to add spaces.

4. Hit 'Save'.

5. Go to the 'Drafts' folder in your Outlook or Exchange Mailbox.

   If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

   Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

6. Highlight the mail message that is your new element.

7. Click and hold down your left mouse button on the new element email.

8. Drag the new element email over to the 'Element' folder and drop it into the 'Element' folder.
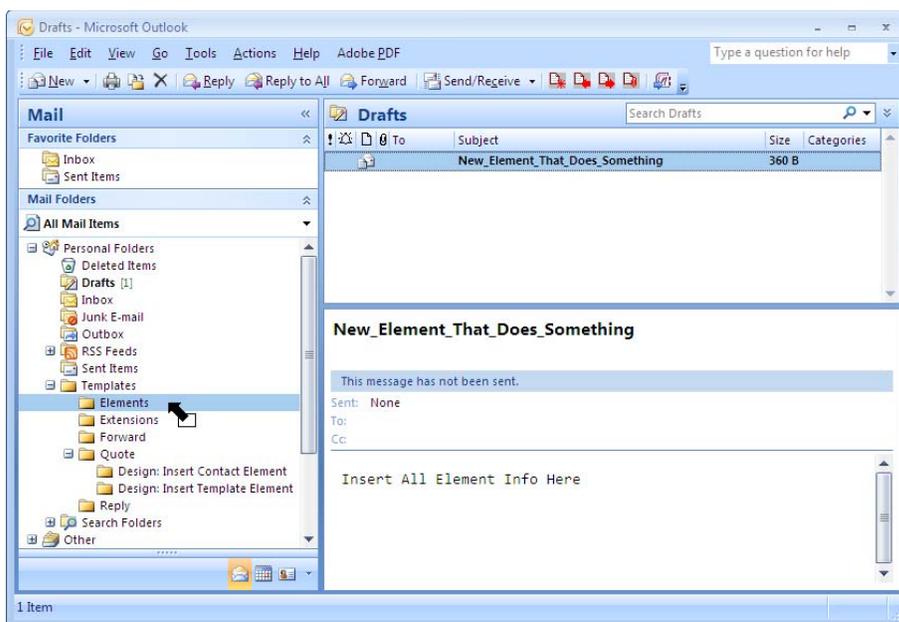
   Go to the 'Templates' folder in your Outlook or Exchange Mailbox. If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder. Look for the subfolder of Email Templates™ called 'Elements'.

   Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder. Look for the subfolder of Email Templates™ called 'Elements'.

   Your new element email should now be in the 'Elements' folder.

Adding Additional Customized Elements

Simply create a new mail message with additional element information. Drag your new message from the drafts folder to the 'Elements' folder.

Using a New Customized Element

1. Open a template. When you are creating or editing a template, place your cursor where you want a Template Element to appear.

2. Type the following: &ELEMENT_NAME;

    ELEMENT_NAME   = Name of the element you wish to add, no spaces allowed.

    &ELEMENT_NAME; = The 'ELEMENT_NAME' listed above. When inserting an element into
                          your template, it must be written in the following form: An
                          ampersand (&) must be placed <u>before</u> the name of the element. A
                          semicolon (;) must be placed at the <u>end</u> of the element name.

    So, if my new element is called: New_Element_That_Does_Something, the body of the text would
                          look like this:
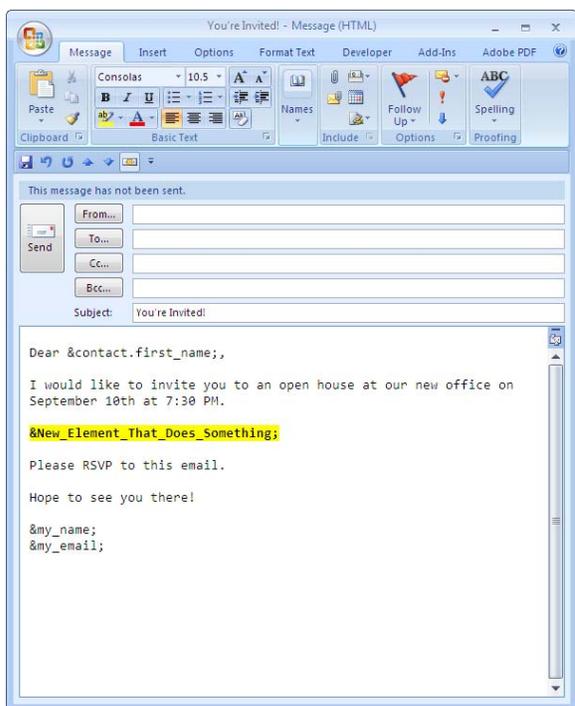
3. Click 'Save'.

4. Now use the template you just created. Please see **Using the Templates** section of these Help
    Files.

    Email Templates™ has inserted the text "This is showing how to use this element command." into the
    email where &New_Element_That_Does_Something; were placed in the template.

<u>Example: Adding a New Customized Element</u>

In this example, we will create a signature line and add it to an email.

1. To create a new Customized Element, open a new email by

    –   Clicking on '<u>N</u>ew', '<u>M</u>ail Message', or
    –   Clicking on '<u>F</u>ile', 'Ne<u>w</u>', '<u>M</u>ail Message', or
    –   Typing 'CTRL' + 'N' on your keyboard.

2. Type the name of the new element into the subject line of your email. This does not have any limitations. The name of this example will be: business_signature

3. In the body of the email, type your signature information. In this case, we have inserted fake contact information.

   It is important to note that business_signature is what you are going to call this element. It cannot have spaces, so underscores (_) have been added, replacing the spaces.


4. Hit 'Save'.

5. Go to the 'Drafts' folder in your Outlook or Exchange Mailbox.

   If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

   Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

6. Highlight the mail message that is your new element.

7. Click and hold down your left mouse button on the new element email.

8. Drag the new element email over to the 'Elements' folder and drop it into the 'Elements' folder.

   Go to the 'Templates' folder in your Outlook or Exchange Mailbox. If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder. Look for the subfolder of Email Templates™ called 'Elements'.

Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder. Look for the subfolder of Email Templates™ called 'Elements'.

Your new element email should now be in the 'Elements' folder.

9. Open a template. When you are creating or editing a template, place your cursor where you want a Template Element to appear. For this example, we will take an existing template and add the new Signature Element.

To open a template, go to the 'Templates' folder in your Outlook or Exchange Mailbox.

If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

10. Open the template called "Company Event" by double-clicking on it.

&contact_name;   =   Finds the name of the contact and inserts it into the email.

11. Now personalize the email. In this case, all the brackets will be filled in and the signature command will be inserted.

Type '&business_signature;' to let Outlook know that you want to insert the Business Signature Element into your email template.

&business_signature;   =   The 'Signature' element listed above. When inserting an element into your template, it must be written in the following form:

An ampersand (&) must be placed <u>before</u> the name of the element.

A semicolon (;) must be placed at the <u>end</u> of the element name.

In this case, '&business_signature;' is simply referring to the place where you want to insert the signature text.

12. Click 'Save'.

13. Now use the template you just created. Email Templates™ will insert the signature information into the email where '&business_signature;' was placed in the template.

Creating Customized Extensions

Each new extension can have a file of its own, or you can have one file with all of the extensions together. Customized extensions are like Elements, however you can store multiple extensions in one email rather than one individualized email for each element.

The format for creating a customized extension is: et add extension1 {Hello from Email Templates Sales.}

et add	=	Always added to the beginning of the line.
extension1	=	Name of the extension you wish to add, no spaces allowed.
{ TEXT }	=	The text you want Email Templates™ to insert at the extension.

Creating a New Customized Extension

The benefit of creating customized extensions is that if you need to change any of the information, you only need to change it once and not on every email template you have created.

1. To create a new Customized Extension, open a new email by
    –   Clicking on 'New', 'Mail Message', or
    –   Clicking on 'File', 'New', 'Mail Message', or
    –   Typing 'CTRL' + 'N' on your keyboard.

2. Type the name of the new extension into the subject line of your email. This does not have any limitations.

3. In the body of the email, type the command:

    et add Name_of_New_Extension {This is showing how to use this extension command.}

    It is important to note that Name_of_New_Extension is what you are going to call this extension. It cannot have spaces, so underscores (_) have been added to add spaces.

4. Hit 'Save'.

5. Go to the 'Drafts' folder in your Outlook or Exchange Mailbox.

    If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

    Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

6. Highlight the mail message that is your new extension.

7. Click and hold down your left mouse button on the new extension email.

8. Drag the new extension email over to the 'Extensions' folder and drop it into the 'Extensions' folder.

    Go to the 'Templates' folder in your Outlook or Exchange Mailbox. If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder. Look for the subfolder of Email Templates™ called 'Extensions'.

    Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder. Look for the subfolder of Email Templates™ called 'Extensions'.

    Your new extension email should now be in the 'Extensions' folder.

Adding Additional Customized Extensions

There are two ways to add additional Customized Extensions.

The first way is to create new email templates with one Customized Extension per Extension Template. So, if there were three Customized Extensions, there would be three Extension Templates in the 'Extensions' folder, each with an individual subject line.
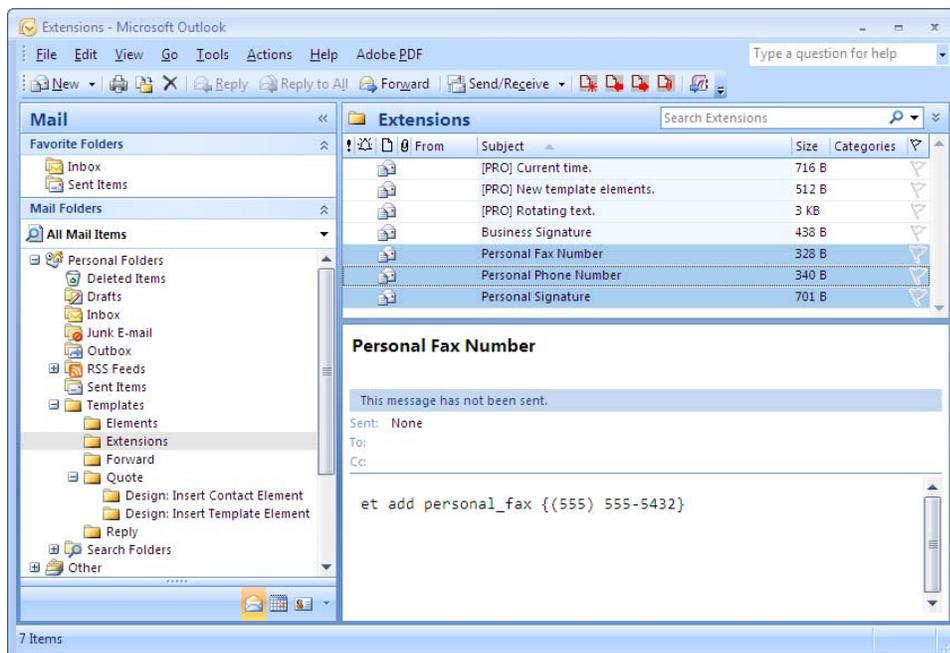
The second way to add additional Customized Extensions is to add all of the extensions onto one template. Instead of having three separate templates, you can have one template with several extensions listed on the page.
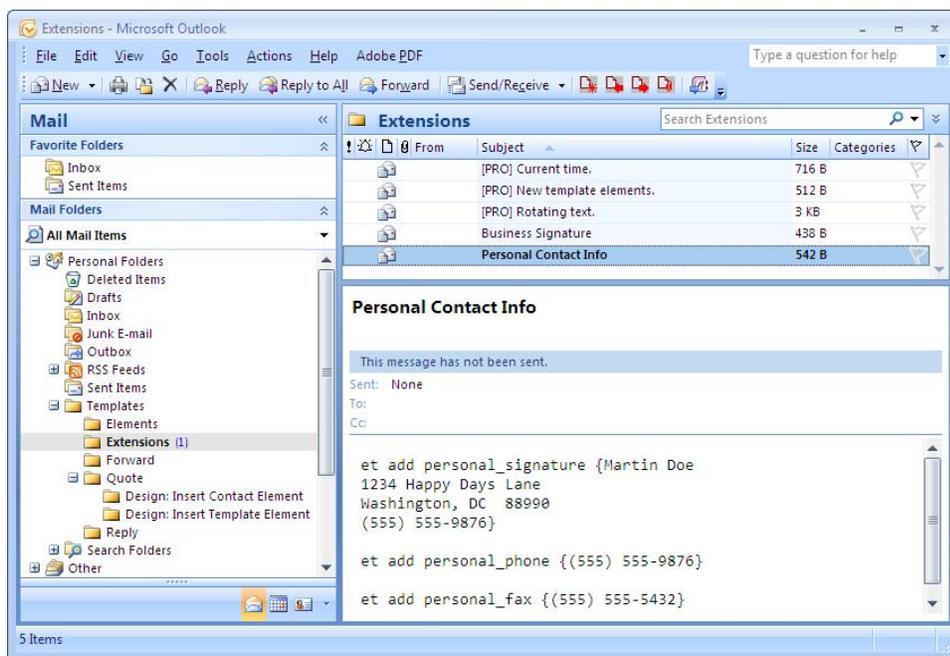
Using a New Customized Extension

1. Open a template. When you are creating or editing a template, place your cursor where you want a Template Extension to appear.

2. Type the following: &EXTENSION_NAME;

   EXTENSION_NAME   =   Name of the extension you wish to add, no spaces allowed.

   &EXTENSION_NAME; =   The 'EXTENSION_NAME' listed above. When inserting an extension
                        into your template, it must be written in the following form: An
                        ampersand (&) must be placed <u>before</u> the name of the extension. A
                        semicolon (;) must be placed at the <u>end</u> of the extension name.

   So, if my new extension is called: Name_of_New_Extension, the body of the text would look like this:

   &Name_of_New_Extension;

3. Click 'Save'.

4. Now use the template you just created. Please see **Using the Templates** section of these Help
   Files**.**

<u>Example: Adding a New Customized Extension</u>

In this example, we will create a signature line and add it to an email.

1. To create a new Customized Extension, open a new email by

   – Clicking on '<u>N</u>ew', '<u>M</u>ail Message', or
   – Clicking on '<u>F</u>ile', 'Ne<u>w</u>', '<u>M</u>ail Message', or
   – Typing 'CTRL' + 'N' on your keyboard.

2. Type the name of the new extension into the subject line of your email. This does not have any
   limitations. The name of this example will be: Personal Contact Info

3. In the body of the email, type the command:

   et add personal_signature {Martin Doe
   1234 Happy Days Lane
   Washington, DC 88990
   (555) 555-9876}

   It is important to note that personal_signature is what you are going to call this extension. It cannot
   have spaces, so underscores (_) have been added, replacing the spaces.

4. Hit 'Save'.

5. Go to the 'Drafts' folder in your Outlook or Exchange Mailbox.

   If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'.
   Click on the '+' to open the 'Templates' folder.

   Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate
   the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open
   and expand the Templates folder.

6. Highlight the mail message that is your new extension.

7. Click and hold down your left mouse button on the new extension email.

8. Drag the new extension email over to the 'Extensions' folder and drop it into the 'Extensions' folder.

    Go to the 'Templates' folder in your Outlook or Exchange Mailbox. If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder. Look for the subfolder of Email Templates™ called 'Extensions'.

    Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder. Look for the subfolder of Email Templates™ called 'Extensions'.

    Your new extension email should now be in the 'Extensions' folder.

9. Open a template. When you are creating or editing a template, place your cursor where you want a Template Extension to appear. For this example, we will take an existing template and add the new Signature Extension.

    To open a template, go to the 'Templates' folder in your Outlook or Exchange Mailbox.

    If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

    Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

    Open the template called "Company Event" by double-clicking on it.

    &contact_name;   =   Finds the name of the contact and inserts it into the email.

10. Now personalize the email. In this case, all the brackets will be filled in and the signature command will be inserted.

    Type '&personal_signature;' to let Outlook know that you want to insert the Signature Extension into your email template.

    & personal_signature;   =   The 'Signature' extension listed above. When inserting an extension into your template, it must be written in the following form:

                                   An ampersand (&) must be placed <u>before</u> the name of the extension.

                                   A semicolon (;) must be placed at the <u>end</u> of the extension name.

    In this case, '&personal_signature;' is simply referring to the place where you want to insert the signature text.

11. Click 'Save'.

12. Now use the template you just created. Email Templates™ will insert the signature information into the email where '&personal_signature;' was placed in the template.

Example: Adding Additional Custom Extensions

Now we will add two additional custom extensions - the phone number and the fax number. There are two ways to add this information. You can either insert the information into the same template, or you can create individual Extension Templates.

1. Go to the 'Templates' folder in your Outlook or Exchange Mailbox.

   If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

   Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

   Look for the subfolder of Email Templates™ called 'Extensions'.

   Your extension email should be in the 'Extensions' folder.

   Double-click on the existing Extension Template called "Personal Contact Info".

2. Simply add the following lines:

   et add personal_phone {(555) 555-9876}

   and

   et add personal_fax {(555) 555-5432}

   The template will now look like this:
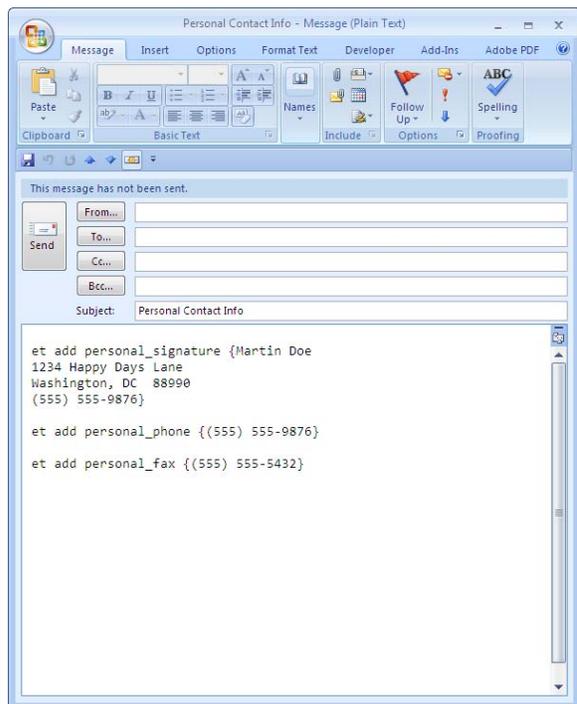
3. Click 'Save'.

4. To add these new extensions into the template "Company Event", open the template in the 'Templates' folder.

   If the 'Folder List' is not visible, click on 'View' from the Outlook toolbar, and then select 'Folder List'. Click on the '+' to open the 'Templates' folder.

Outlook 2007: If the 'Folder List' is not visible, click on 'Folder List' Navigation Pane button to locate the 'Folder List'. Alternatively, you can click on 'Go' then select 'Folder List'. Click on the '+' to open and expand the Templates folder.

Double-click on the existing template called "Company Event".

5. Personalize the email. In this case, all the brackets will be filled in and the signature command, phone number, and fax number will be inserted.

&contact_name;   =   Finds the name of the contact and inserts it into the email.

Type '&personal_signature;' to let Outlook know that you want to insert the Signature Extension into your email template.

&personal_signature;   =   The 'Signature' extension listed above. When inserting an extension into your template, it must be written in the following form:

An ampersand (&) must be placed <u>before</u> the name of the extension.

A semicolon (;) must be placed at the <u>end</u> of the extension name.

Type '&personal_phone;' to let Outlook know that you want to insert your personal phone number into your email template.

personal_phone   =   Name of the extension you wish to add, no spaces allowed.

&personal_phone;   =   The 'personal_phone' extension listed above. When inserting an extension into your template, it must be written in the following form:

An ampersand (&) must be placed <u>before</u> the name of the extension.

A semicolon (;) must be placed at the <u>end</u> of the extension name.

Type '&personal_fax;' to let Outlook know that you want to insert your personal fax number into your email template.

personal_fax   =   Name of the extension you wish to add, no spaces allowed.

&personal_fax;   =   The 'personal_fax' extension listed above. When inserting an extension into your template, it must be written in the following form:

An ampersand (&) must be placed <u>before</u> the name of the extension.

A semicolon (;) must be placed at the <u>end</u> of the extension name.

6. Click 'Save'.

7. Now use the template you just created.

<u>Tips and Tricks</u>

Need help customizing all of the features available with Email Templates™? Below are a list of commonly used Tips and Tricks to help you get the most out of the package.

Getting Help
The Email Templates™ Help File may be accessed under Help \ Email Templates™ Help Topics in the Outlook menu bar.

What Is A Template
Templates are normal messages stored in a special Outlook folder that is normally named 'Templates'. You may modify templates just like you do with any other message.

Creating Templates
To convert a message into a template, simply drag it into your Templates folder within Outlook. Alternatively, to create a new template, select Actions \ Email Templates™ \ Create New Template from the Outlook menu bar.

Addressing
Templates may contain addresses, which are copied into the messages created from them. Pre-addressed templates can be quite useful in cases when you send frequent messages to a particular person or mailing list.

Processing Multiple Messages
Templates may be applied to more than one message at a time. Simply select (highlight) several messages and then select a template from the menu. A new message will be created for every message selected. To have the new messages go straight into the Outbox, hold down the Control key while selecting the template.

Reply To All
To use a Reply Template to reply to all the addressees of a message (i.e. not only to the sender), hold down the Shift key before applying the template.

Single Step Send
To have the message created by the template go straight into the Outbox (without first being displayed for approval), hold down the Control key while selecting the template.

HTML Formatting
Templates may contain HTML, which is reflected into the newly created message. You must select the corresponding checkbox under Tools \ Options \ Email Templates™ Options for this to happen.

A Personal Touch
The &sender_first_name; template element can automatically give a personal touch to template replies.

Messages To Contacts
When you select a contact and activate a New Message Template, the newly created message is addressed to the contact.

Messages To Groups Of Contacts
To send a template message to a list of contacts, select the contacts, and then select a New Message Template from the menu. A new message will be created for each contact. To have the new messages go straight into the Outbox, hold down the Control key while selecting the template.

Moving Processed Messages
Use the 'et moveto' command to automatically move messages to a particular folder after applying a template to them. For instance, you can have **Reply Templates** move answered messages to a 'Replied To' folder after replying to them.

Changing The subject Prefixes
To change the text before the subject of a Reply Template (Re:) or a Forward Template (Fw:), go to Tools \ Options \ Email Templates™ Options.

Organize Templates
If you have a long list of templates, consider creating subfolders under the templates folders, and re-organizing the templates inside them. The subfolders will appear as submenus in the template menus.

Scripting
Email Templates™ scripts can automate about every email task you can think of. For more information on scripting, please consult the help file under Help \ Email Templates™ Help Topics in the Outlook menu bar.

Preaddressed Templates
When creating a template for a message you send to the same person over and over, you can make the message header information (To, Cc, and Subject) a part of the template. Once in the template, this information never has to be retyped into each mail message you send.

Shared/Public Templates
Public Templates are used to share templates with other members of your Workgroup. To setup Public Templates, put the templates in a Public Folder, and then select that folder under Tools \ Options \ Email Templates™ Options \ Public Templates.

Template Elements
For a list of template elements, please refer to the Introduction to Templates section of the Email Template's help file. The help file may be accessed under Help \ Email Templates™ Help Topics in the Outlook menu bar.

Automatic Templates
Email Templates™ may be automatically activated through the Outlook Inbox Rules Wizard. They are available as a 'custom action' within the wizard. *(NOTE: Custom actions are not supported in Outlook XP).*

Automatic Deferred Delivery
If you would like to defer delivery of a message until a later time, use the 'et defer' command (e.g. 'et defer 2 days'). This feature is quite useful for automatically sending follow-up messages to previously sent messages.

Activating More Than One Template
Use the 'et redirect' command to activate more than one template with a single click (i.e. through a single template).

Asking Questions
Use the &input.value; template element to prompt for information. The element will then be substituted with the entered text everywhere it is used in the template.

Extensions
Email Templates™ Extensions are specialized scripts entered in the Extensions subfolder of the Templates folder. They can provide additional template elements and other functionality. Please take a look at some of our sample extensions.

Changing The Subject
To set a different subject into a message created by a Reply or Forward Template, consider using the 'et set subject' command.

Message Attachments
To include the attachments of the original message into a message created by a template, use the &attachments; template element.

Message Options
When creating a new template, check the message Options (in the Outlook toolbar) for options such as 'Importance', 'Sensitivity', 'Reply To', etc.

Advanced User Features

Email Templates™ may be extended and customized by scripting. Two types of languages are supported; Microsoft VBScript and Tcl (Tool Command Language).

VBScript

VBScript is a versatile scripting language based on Microsoft Visual Basic. VBScript gives you access to many powerful functions for task automation data storage and retrieval. Email Templates™ allows you to use VBScript directly in your message templates giving you access to a full range of powerful features.

Using VBScript within Email Templates™ also allows you to incorporate native VBScript Objects as well as ActiveX objects. For example, you could create a template that automatically logs email addresses to an external database with database objects. You could have templates that automatically send file information by using the File System Object within your scripts. VBScript also has powerful string parsing features allowing you to easily customize automated replies.

For more information on VBScript visit the <u>Microsoft Windows Script Technologies</u> page or the <u>Programming with VBScript</u> section of the Microsoft Online Library.

Email Templates™ introduces a new VBScript command named 'ET'. The 'ET' command allows you to interface with Email Templates™ and Outlook. The interface for the 'ET' command includes the following options:

VBScript	Does the following:
ET.Add "element", "text"	Adds a new template element in the templates.
ET.Alert "text"	Displays a message box with text as the message.
ET.Calc ("id", "element")	Computes 'element' in the message (item) with id 'id'. The id of the item may be retrieved from other options, e.g. folder. If element is a hexadecimal number that starts with '0x' (e.g. 0x0037001E), then the corresponding MAPI message property is returned. (For more information on MAPI properties, please refer to the MAPI SDK in the Microsoft Win32 SDK).
ET.Folder ("eid", "pathlist")	Returns the MAPI id of the folder named 'pathlist'. Pathlist is a list whose elements provide the path to the folder.
ET.Folder ("property", "folderid")	Returns a particular property from the folder with id 'folderid'. 'property' may be either messages or subfolders. The first returns a list consisting of the id-s of the messages contained in the folder, while the second returns a list consisting of the id-s of the folders contained in the folder.
ET.Message ("element")	Provides the value (text) of a template element (such as 'subject', 'body', etc.) with respect to the current message. If element is a hexadecimal number that starts with '0x' (e.g. 0x0037001E), then the corresponding MAPI message property is returned. (For more information on MAPI properties, please refer to the MAPI SDK in the Microsoft

Win32 SDK).

ET.Calc ("eid", "element")	Similar to message element, but operating on the message with entry id eid instead.
ET.Proplist ("eid")	Returns the list of property tags for the object with id eid..
ET.Clear "recipients"	Clears the recipient list for the new message. New recipients may be set by using the set recipient command below.
ET.Set "property", "value"	Sets a property in the message being created. property may be: subject, recipient, or a MAPI tag (starting with '0x'). In the case of recipient, the value consists of email name recipient_type address_type. If name is not specified, it defaults to email. recipient_type is one of the following: TO, CC, BCC (defaults to TO). address_type defaults to SMTP.
ET.Redirect "template1", "template2"	Continues processing by substituting the current template with the template with subject templatex (which must be of the same category). If more than one template is specified, than a new message is created for each of the specified templates.
ET.Defer "time"	Defers sending message by time. 'sendafter' may also be used instead of 'defer'. Examples of time include: "1 day", "1 week", "5 hours", "25 Nov 1998".
ET.Moveto "pathlist"	Moves the current message to the folder whose full path is given by pathlist in the Personal Messages store.
ET.Choose "folder"	Displays a mailbox folder selection dialog. Returns the id of the folder, or an empty string if the user cancels the dialog.
ET.Choose "filename"	Displays a file selection dialog. Returns the full path of the file, or an empty string if the user cancels the dialog.
ET.Stop	Stops the execution of the script, and any further template processing.

Tcl

Tcl is a powerful, portable, cross-platform, Rapid Application Development scripting language. Tcl programs do not need to be recompiled after each change, so scripts can be developed very quickly.

Tcl is also free. You may learn more about Tcl at dev.scriptics.com. On this website you can find information on Tcl, recent versions of Tcl, a quick primer for Tcl, and even a handy tutor for Tcl. Or, pick up one of many books on the subject. We would suggest the following:

- John K. Ousterhout, Tcl and the Tk Toolkit, Addison-Wesley, 1994, ISBN 0-201-63337-X
- Brent B. Welch, Practical Programming in Tcl and Tk, Prentice Hall, 1997, ISBN 0-13-616830-2

Programmers already familiar with Tcl should have no problems implementing the code within their templates. Experienced programmers will find Tcl easy to learn and quite powerful, especially with trickier

tasks like parsing data and string manipulation. Inexperienced programmers will find Tcl a good language to start with. Tcl communities are lauded for being tight knit and very helpful.

Email Templates™ introduces a new Tcl command named 'et'. The 'et' command allows you to interface with Email Templates™ and Outlook. The interface for the 'et' command includes the following options:

Tcl	Does the following:
et add element text	Adds a new template element in the templates.
et alert text	Displays a message box with text as the message.
et calc id element	Computes 'element' in the message (item) with id 'id'. The id of the item may be retrieved from other options, e.g. folder. If element is a hexadecimal number that starts with '0x' (e.g. 0x0037001E), then the corresponding MAPI message property is returned. (For more information on MAPI properties, please refer to the MAPI SDK in the Microsoft Win32 SDK).
et folder eid pathlist	Returns the MAPI id of the folder named 'pathlist'. Pathlist is a list whose elements provide the path to the folder.
et folder property folderid	Returns a particular property from the folder with id 'folderid'. 'property' may be either messages or subfolders. The first returns a list consisting of the id-s of the messages contained in the folder, while the second returns a list consisting of the id-s of the folders contained in the folder.
et message element	Provides the value (text) of a template element (such as 'subject', 'body', etc.) with respect to the current message. If element is a hexadecimal number that starts with '0x' (e.g. 0x0037001E), then the corresponding MAPI message property is returned. (For more information on MAPI properties, please refer to the MAPI SDK in the Microsoft Win32 SDK).
et calc eid element	Similar to message element, but operating on the message with entry id eid instead.
et proplist eid	Returns the list of property tags for the object with id eid..
et clear recipients	Clears the recipient list for the new message. New recipients may be set by using the set recipient command below.
et set property value	Sets a property in the message being created. property may be: subject, recipient, or a MAPI tag (starting with '0x'). In the case of recipient, the value consists of email name recipient_type address_type. If name is not specified, it defaults to email. recipient_type is one of the following: TO, CC, BCC (defaults to TO). address_type defaults to SMTP.

et redirect "template1" "template2"	Continues processing by substituting the current template with the template with subject templatex (which must be of the same category). If more than one template is specified, than a new message is created for each of the specified templates.
et defer time	Defers sending message by time. 'sendafter' may also be used instead of 'defer'. Examples of time include: "1 day", "1 week", "5 hours", "25 Nov 1998".
et moveto pathlist	Moves the current message to the folder whose full path is given by pathlist in the Personal Messages store.
et choose folder	Displays a mailbox folder selection dialog. Returns the id of the folder, or an empty string if the user cancels the dialog.
et choose filename	Displays a file selection dialog. Returns the full path of the file, or an empty string if the user cancels the dialog.
et stop	Stops the execution of the script, and any further template processing.

Programming

Email Templates™ uses scripting in two ways: Inline Scripting and Email Templates™ Extensions. Inline scripting involves writing VBScript or Tcl code within existing or newly created Email Templates™. This is the core process in the creation of more complex templates. Email Templates™ extensions are scripts of new procedures and new elements that can be called upon in your templates. Extensions allow you to create your own library of information and techniques for the regular use of Email Templates™.

Inline Scripting

Scripts may be provided in the text of a template and are enclosed within <vbscript>...</vbscript> for VBScript and <et>... </et> for Tcl scripts. They are evaluated before the new message is created, in the order that they are entered. You may add as many scripts as are necessary. Scripts will not appear within the final message. Inline scripts may be used to create new template elements, change message properties, perform actions on the mailbox, etc.

Here is an example of a simple script inside a template:

Hi guys,

Today is &day_of_the_week; and I work from home!

```
<et>
set day [clock format [clock seconds] –format %A]
et add day_of_the_week $day
</et>
```

If this template was evaluated on a Tuesday, the result message would look like:

Hi guys,

Today is Tuesday and I work from home!

Questions, Comments & Suggestions

If you encounter any difficulties with Email Templates™, please take a look at our <u>Users Guide</u> and Help Manual, or our website at www.emailtemplates.com.