FRM Solutions, LLC

How to Create an Email Template in FRM

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How to Create an Email Template

1. Navigate to Marketing > Templates in the FRM ribbon

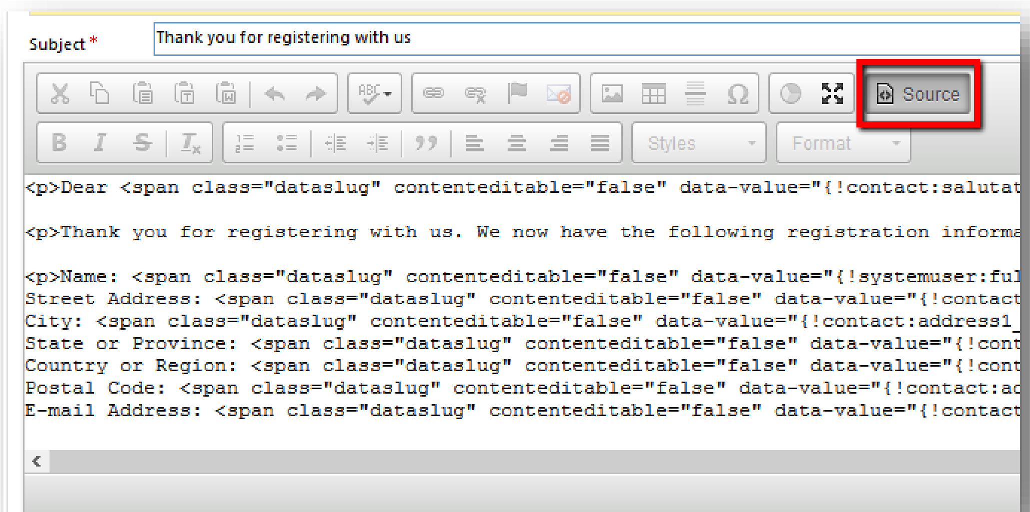
2. Select **Email Templates**

3. Select **New**

4. Select **Template Type** from the drop-down. You may create a global template or a template for the entities in the drop-down. Please note that if you select a **Global** template type you will not be able to automatically populate FRM data into your email (i.e. Lead – First Name). Once you have chosen your entity click **OK**.

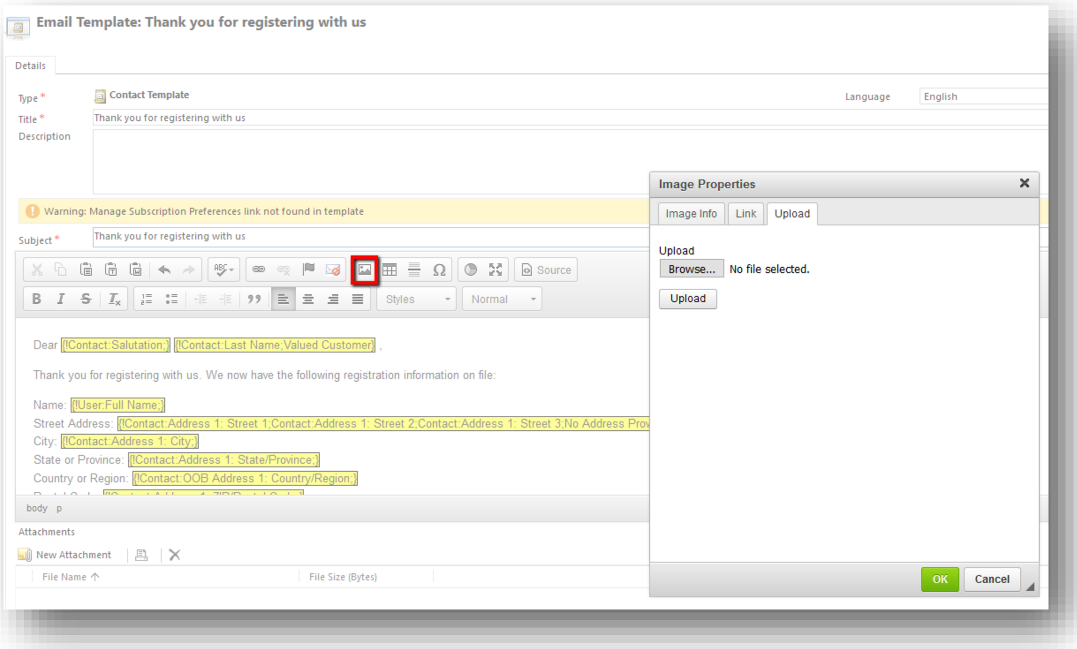
5. Provide a **Title** and **Subject** for your email. Please note that the title in not customer-facing and only used for differentiating between your email templates within FRM.

6. Proceed to complete your email in the editor indicated below:



This editor will accept HTML by selecting the **Source** button in the screenshot above. Simply paste in your HTML from your source. Do NOT use the “Attachments” section for this! That is only for attachments that you want on the email for recipients to see.

7. If you have any images you need to upload, then use the image button within the editor to upload your images. **IMPORTANT**: Make sure you are uploading individual image files and not a zipped folder. You will need to upload each one to add it to the appropriate spot in your email:



8. If you selected a template type other than **Global**, then you have the ability to inject data from the FRM record directly into the email automatically. In the following example, we will use a template type **Lead** and inject the Lead's first name into our email.

9. Place the cursor in your editor precisely where you would like the lead's first name to appear.

10. Select **Insert/Update** from the options at the top of your window

11. A Pop-up window will appear. Select **Add**

12. Select the record type (in our case a Lead)

13. Select the field you would like to add (First name) then click OK

14. Click OK

15. You will notice text highlighted in yellow was added to your email template. This is the data that will be dynamically populate based on whom you send the email to each time you use this template.

16. Once you have completed the rest of your email select **Save and Close** from the options at the top of your window

17. This template may be used in drip campaigns, workflows & campaigns. It may be also sent to an individual, or multiple individuals, by selecting them and clicking **Send Direct Email**

18. After clicking **Send Direct Email** your will be prompted to choose your template from a list of global templates and also those related the record type you are sending the email to (i.e. Lead)

Also note, that from this window you can choose to send the email to the records you selected OR you have the option to send to all on the current page OR all in the current view.

19. Select **Send**