
Customizing the Basic E-Mail Template

As we have already seen, there are actually three ways you can send an e-mail to an ACT! contact in your database and have that action recorded as **E-mail Sent** in the **Notes/History** tab. You can send the message from the ACT! E-mail window, from the ACT! Contact window, or from Outlook.

When you send e-mail from the ACT! E-mail Window (by clicking the New button), the signature that you entered into ACT!'s preferences when you set up ACT! will be inserted automatically.



From the ACT! Contact window you can click on the **E-mail Address** field or click **Write, E-Mail Message** or click the **Write E-mail** icon to generate an e-mail for the current contact. Whichever method you choose, when you start the e-mail from the Contact window, the emailbody.gmt template will be used to generate the e-mail. This default e-mail template does not contain your signature.

When you start an e-mail from within Outlook, your signature is taken from the signature file in Outlook

Just consider it practice for signing autographs when you become famous!

Signatures

Don't you hate receiving e-mails from people who forget to include their signature and you have to figure out from their e-mail address who they are (and sometimes that isn't easy either)? It's always a good idea to include your signature on each e-mail that you send out.

E-mail signatures are automatically added to any new message created by clicking the **New** icon in the ACT! e-mail client. However, a signature is not automatically inserted into a message that is started from the Contact's record in ACT!.

When you write an e-mail message from the Contact record, ACT! is using an e-mail template (similar to the way it uses a Letter template when you are writing a letter). You can edit the basic e-mail template to automatically include your signature.

Procedure: To include a signature on the basic HTML e-mail template...

1. In ACT!, click **Write, Edit Graphical (HTML) E-mail Template...**
2. Select **emailbody.gmt** and click **Open**
3. Drag the **Mail Merge Fields** dialog box to the lower right corner of the window if necessary.

Regardless of the Word Processor you selected to use with ACT!, e-mail templates are opened into the ACT! Word Processor window, with the Mail Merge Fields Dialog box displayed.

Click on the Mail Merge Fields title bar and drag the dialog box to the lower right side of your screen so you can see the blank e-mail template.



4. From the Formatting bar, select the font you would like to use for your default message text.
5. Click in the Word Processor window. Press **[Enter]** twice.
6. In the **Mail Merge Fields** dialog, click the **My Record field** option and select “Contact” (or First Name) from the **Field:** list.

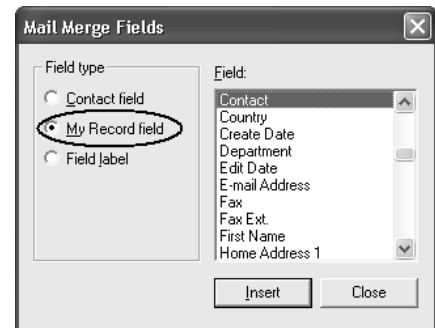
Arial 10 is the standard font used in most e-mail software.

[Enter] twice to place a space between the text and signature.

If you are the only one using the database, you can just type your signature line. If you will be sharing the database and templates with others, use **Mail Merge Fields** to insert fields into the templates so that your entire team can also use the default e-mail template.

Click **Insert**

Press **[Enter]** and then add other fields as desired (Company, Title, Phone, etc.)



7. Close the window and click **Yes** to save the changes.

Mini-Exercise: Send another e-mail


Step	What to do	How to do it/Comments
1.	Write another e-mail to this premier movie agent (yourself) and notice how the signature displays.	
2.	Tab to or click in the message body and enter some text to see how the signature is separated from the message.	This is a test. I.M. Wonderful President Stars R Us 210-555-1000
3.	Close the e-mail without sending. This message is too boring. Let's dress it up a bit.	

Formatting E-Mail Templates

When you originally set up your e-mail composing options (page 11), you selected whether you wanted to send your e-mails in **Plain text** or **HTML**. Plain text messages include no formatting, but you can change the look of your messages if you selected the HTML option.

You can format your e-mail messages with numbering, bullets, alignment, and different font types, styles, and colors. You can also insert pictures and hyperlinks.

Procedure: To create an e-mail merge template...

- Write, Edit Graphical (HTML) E-mail Template...**  *Not all e-mail software will support the HTML formats.*
- Select **emailbody.gmt**

or

double-click the **Other Templates** folder to select a pre-formatted template that comes with ACT!

Click **Open**
- Before starting changes, click **File, Save As**, enter a filename, **Save**
- Edit the template as desired, adding mail merge fields, graphics, formatted text, hyperlinks. To review how to insert mail merge fields, see page 32.
- Save your changes and close the document.

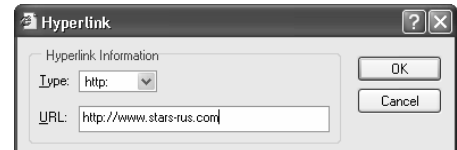
Insert Hyperlink

Just typing the web address in a template will not make it clickable when the template is merged.

Procedure: To attach hyperlinks to an e-mail message...


1. While editing the Graphical E-mail Template, position the insertion point.
2. **Insert, Hyperlink...**

Click at the end of the http:// text in the **URL:** field and type the web site you want to include in the template.




You must include "http://" in the URL.

3. **OK**

 Now if you don't want the http:// to display, you can backspace over it in the template.

Mini-Exercise: Formatting Our Signature Line

Step	What to do	How to do it/Comments
1.	<p>Modify the signature on the default e-mail template.</p> <p>Change the default font for your name to Monotype Corsiva, 18 point, Blue</p> <p>Insert your Title if necessary and make it Arial Italic 10.</p> <p>Insert your Company's web address as a Hypertext link.</p> <p> Since we are working on your live system, perhaps you should enter your real web address here instead of the Stars R Us address.</p>	<div style="border: 1px solid black; padding: 5px;"> <p><My:Contact:26> <My:Title:46></p> <p><My:Company:25> www.cornerstonesolutions.com <My:Phone:35> <i>When you want to see your star on the Walk of Fame...</i></p> </div> <p>Select your name and click Format, <u>F</u>ont... Make the Font, Style, Size and Color changes. Do the same for your title.</p> <p>To insert your web address, click Insert, <u>H</u>yperlink..., click at the end of the <u>http://</u> and type your web address, click OK. Now you can backspace over the http:// if you like.</p>
2.	Save and close the template.	