



Email Template and Workflows

In Dynamics 365 you can create email templates for messages you send out frequently. These templates can contain data from Dynamics and can even be triggered to send automatically by a workflow. There are a few different ways to set up these templates and workflows. In this course we will look at the different options so that organizations can determine the best method for each situation.

COURSE OBJECTIVE: Locate and create email templates for manual and automatic use.

LESSON 1: Locating and Generating Email Templates

- Task 1: Navigate to System Email Templates vs. Personal Email Templates
- Task 2: Selecting Template Type
- Task 3: Develop your email and include CRM fields

LESSON 2: Manually Sending an Email Template

- Task 1: Navigating to the record
- Task 2: Adding an Email Activity
- Task 3: Checking the email

LESSON 3: Sending an Email Template through a workflow

- Task 1: Create a New Process
- Task 2: Set up Options for Automatic Process and/or run On Demand
- Task 3: Best Practices for Email Criteria
- Task 4: Selecting a Template and setting up To/From Fields
- Task 5: Testing the Workflow

LESSON 4: Creating an Email Within a Workflow

- Task 1: Formatting your Text
- Task 2: Adding Merge Fields
- Task 3: Adding Attachments and Hyperlinks
- Task 4: Testing the Workflow
- Task 5: Updating Emails