



# IUP Advise Quick Reference Guide 8 Email Signatures and Templates

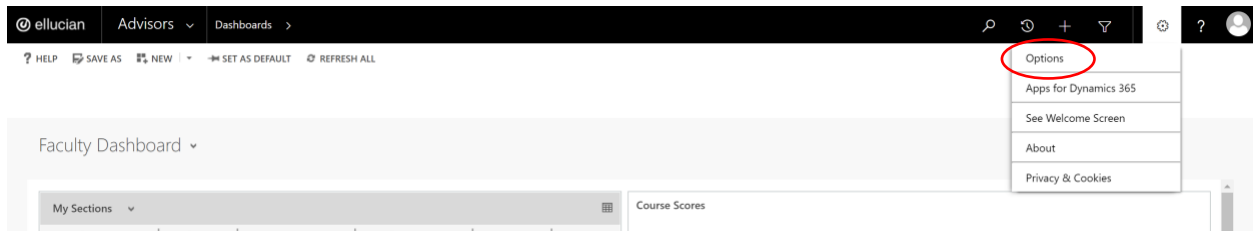
Connect to the [IUP VPN](#) for full access to IUP Advise quick links.

Access IUP Advise: <https://IUPCRM.elluciancrmadvise.com>

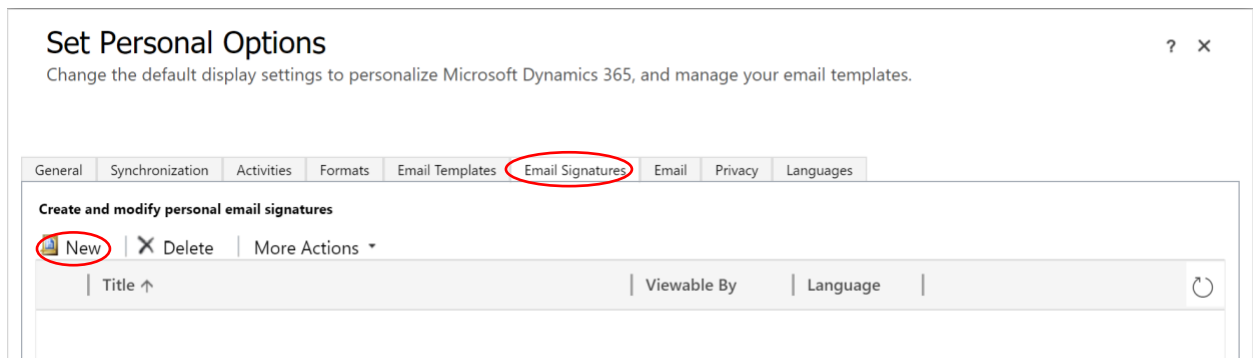
Enable pop-up windows.

## Creating an Email Signature

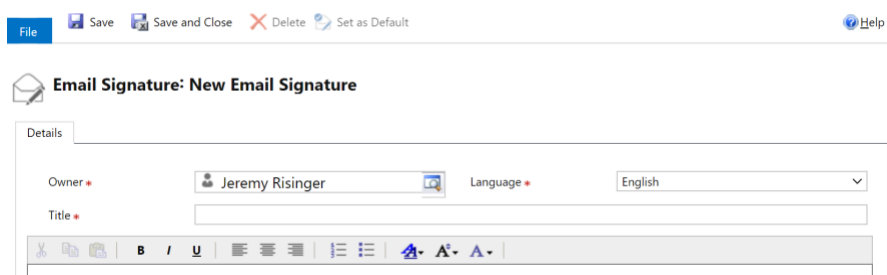
To create an email template, first select the cog wheel on the top-right of your screen and select **Options**.



Once you select **options** you will see a new window open. You will then want to select the **email signatures** tab near the middle of the pop-up window. To create a new email template, you should select **new**.

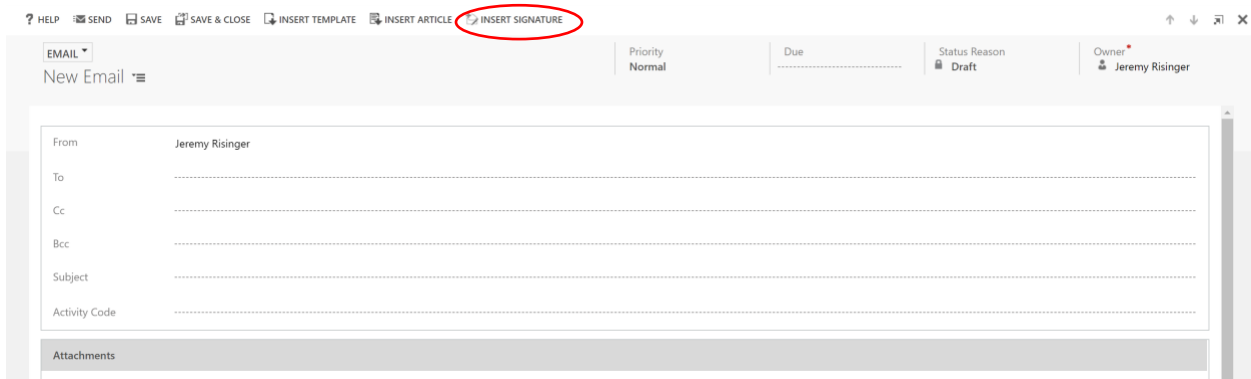


After selecting **new**, a pop-up window will open. In this window you will see an area where you can title the **TITLE** of your email signature and a second space where you can type your signature. The title is not your professional title. It is the title for the email signature. Use specific titles, especially if you create more than one signature.



Once you have typed your desired signature in the box below, select **save and close** at the top of your screen. You will now be able to add this signature to emails you compose through IUP Advise.

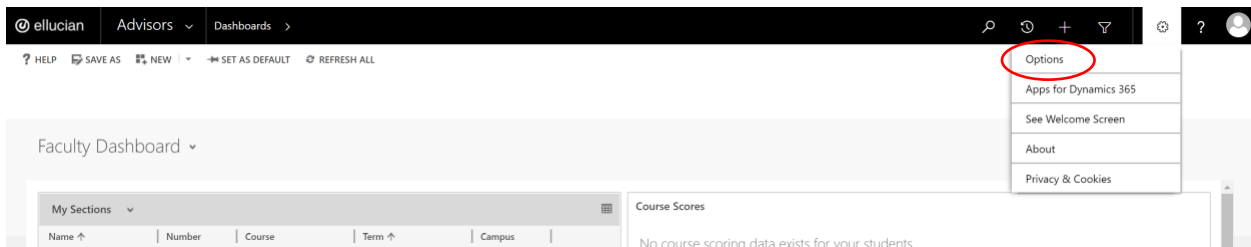
To add a signature to your email, create an email through IUP Advise Activities and select **insert signature** and select the signature you wish to attach.



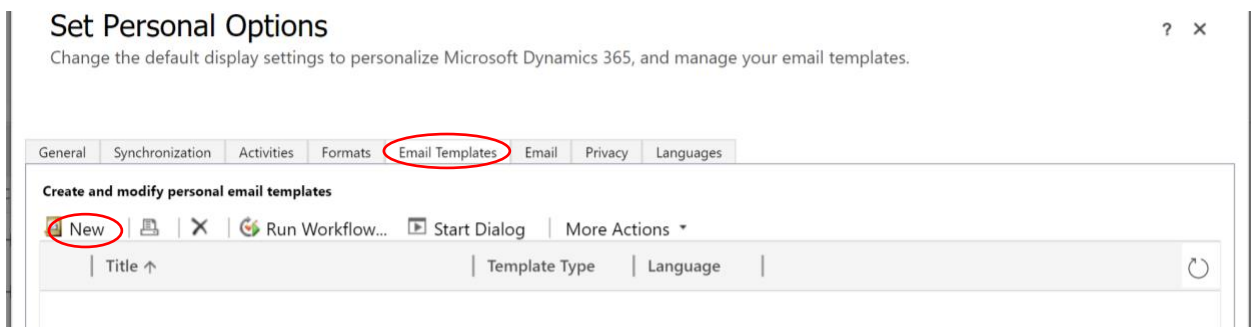
## Creating an Email Template

IUP Advise allows advisors and other university employees to create email templates to make it easier to email individual or groups of students.

To create an email template, select the cog wheel on the top-right of your screen and select **Options**.



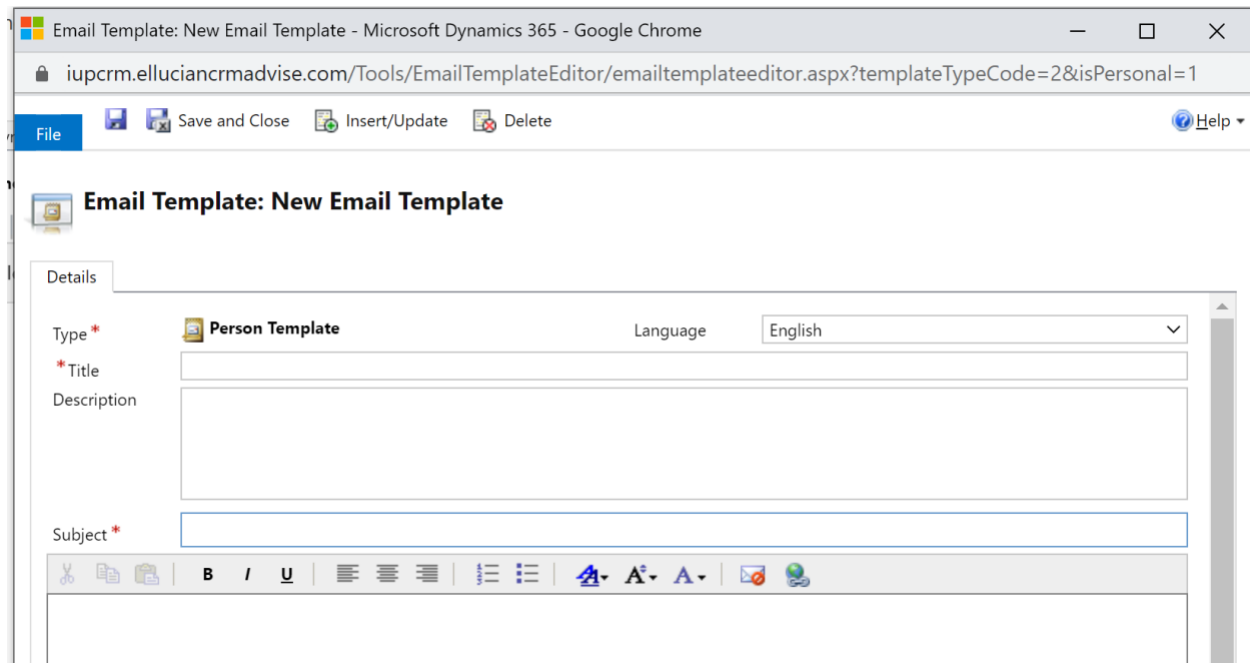
**Options** will open as a new window. Select the **email templates** tab near the middle of the pop-up window. To create a new email template, you should select **new**.



After selecting **new** you will want to select the type of email template you are making. This example is using a **personal** email type.

You will see the pop-up window shown below. The **Title** is the name you want to save the template as, the **Description** is meant to remind you of what this template entails, and the **Subject** is the subject line that will sent to the email recipient. You will add the email text to the area below the subject line.

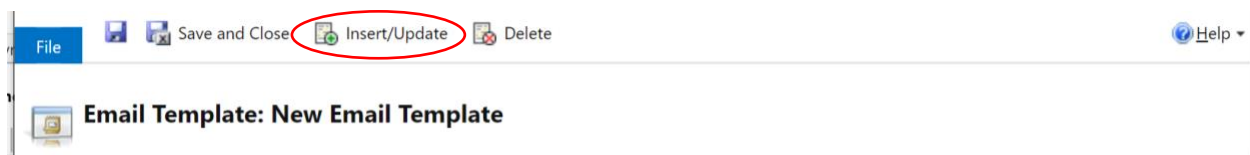
**Pro Tip:** Begin your **Title** with three asterisks (\*\*\*) and your last name. This will elevate your personal templates to the top of the list of available templates. (Personal templates are only visible to you. Some pre-populated templates are available to all users.)



The screenshot shows a web browser window with the URL `iupcrm.elluciancrmadvise.com/Tools/EmailTemplateEditor/emailtemplateeditor.aspx?templateTypeCode=2&isPersonal=1`. The browser title is "Email Template: New Email Template - Microsoft Dynamics 365 - Google Chrome". The page has a menu bar with "File", "Save and Close", "Insert/Update", and "Delete" buttons, and a "Help" icon. The main content area is titled "Email Template: New Email Template" and contains a "Details" section. The "Type" is set to "Person Template" and the "Language" is "English". There are three text input fields: "\*Title", "Description", and "Subject \*". Below the "Subject" field is a rich text editor with a toolbar containing icons for bold, italic, underline, list, link, and other formatting options.

You should add **data fields** to your email templates to pull in personalized information for each email recipient. One easy example of this is the name of the recipient. Without adding a **data field**, your email would lack a personalized greeting.

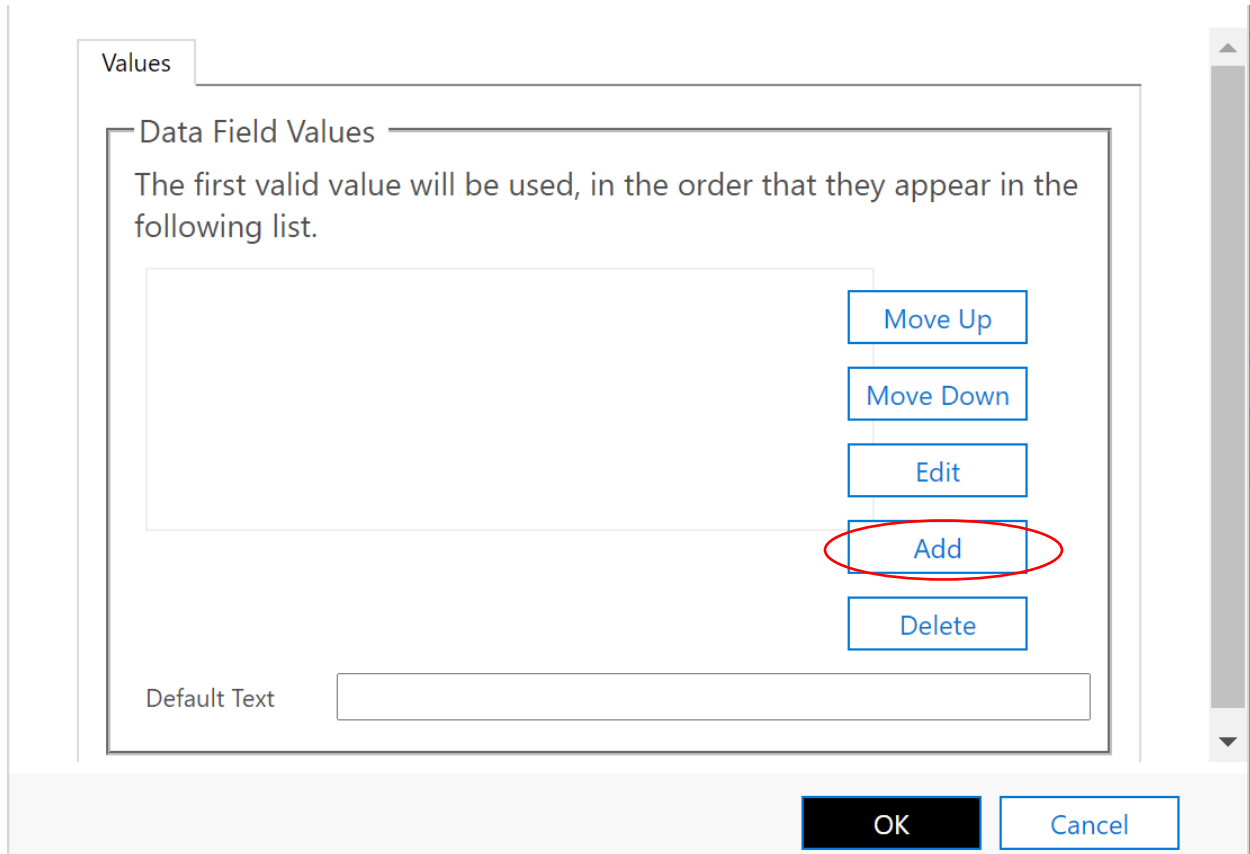
To add **data fields** to your email, click inside the box for the body of the email. After doing so, select **insert/update** and hit **add** on the next screen.



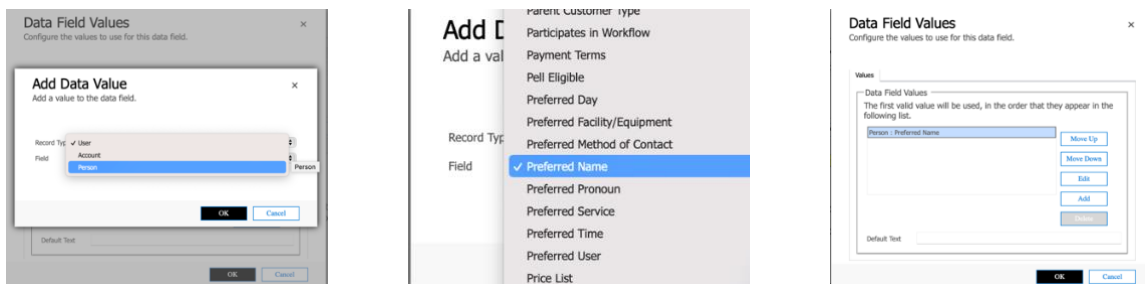
This is a close-up screenshot of the top navigation bar of the email template editor. The "Insert/Update" button, which features a green plus icon, is circled in red. Other buttons visible are "File", "Save and Close", and "Delete". The "Help" icon is also present on the right side of the bar.

In this example we are looking for the **preferred name** and **first name** data fields to ensure we properly address each student we will be emailing.

- 1) Once you select **insert/update**, select **Add** to find the information you want to insert into the email.



- 2) In the Add Data Value window, begin by changing the Record Type to **Person** using the dropdown menu. (left image below)
- 3) Next, use the dropdown menu to select **Preferred Name**. (Center image below. You can scroll through the list or type the letter “P” and you will jump to the “P” section of the dropdown menu.)



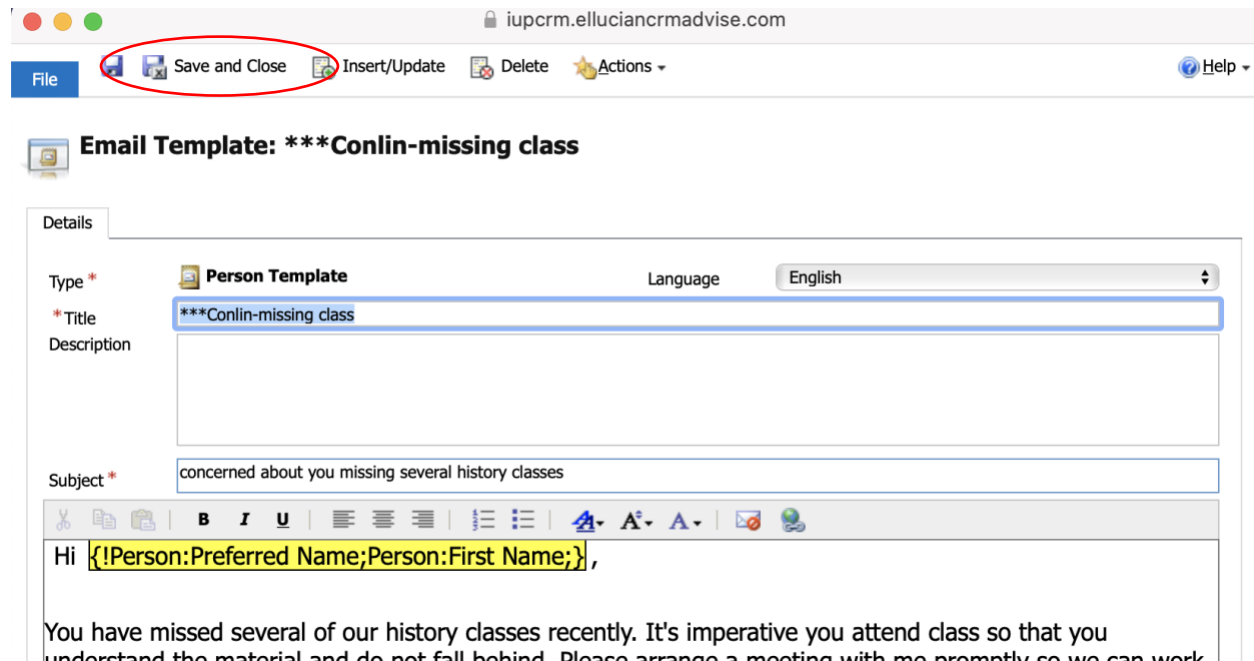
- 4) Once you select “OK” in the Add Data Value with the Person/Preferred Name selection, you will see it added to the Values box. (image above on right)
- 5) Repeat steps 1-4, but this time select “First Name”

Be sure to add both the preferred and first name **to ensure emails are properly addressed to students.**



Once you add the required fields, select **OK** to insert them into the email template.

Note in the image below that the coding highlighted in yellow contains both the preferred and first name fields. The system will first look for a student's preferred name in their file. If the student's file does not have a preferred name listed, it will automatically pull the first name. (It will not include or repeat both names.)



Compose your email and save it by selecting **save and close** at the top of the screen. Remember to make the template general enough to use when bulk emailing students.

Your templates are now available for use.