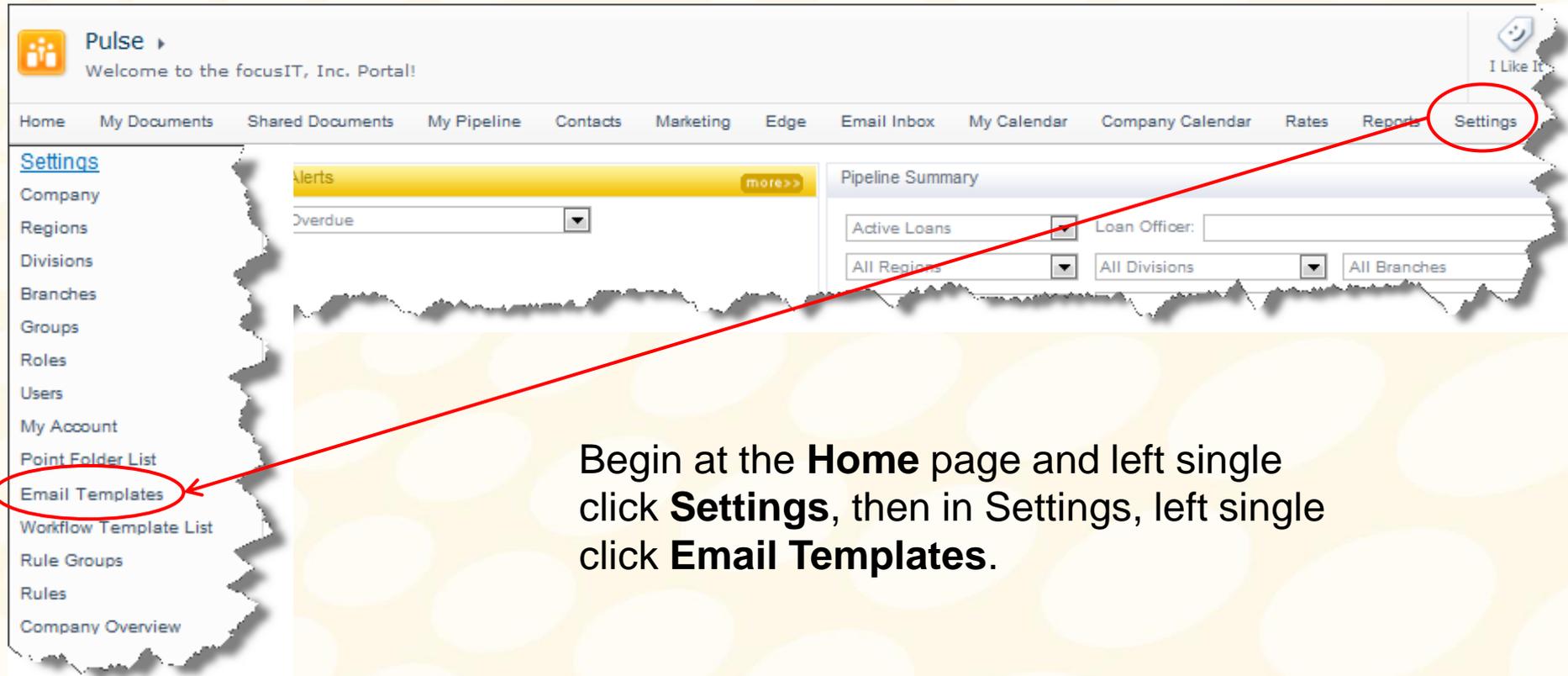


How to Clone an Email Template in Pulse

Cloning an Email Template



Once focusIT has created an email template for your company, you can create additional templates for your company's use by cloning the existing one.

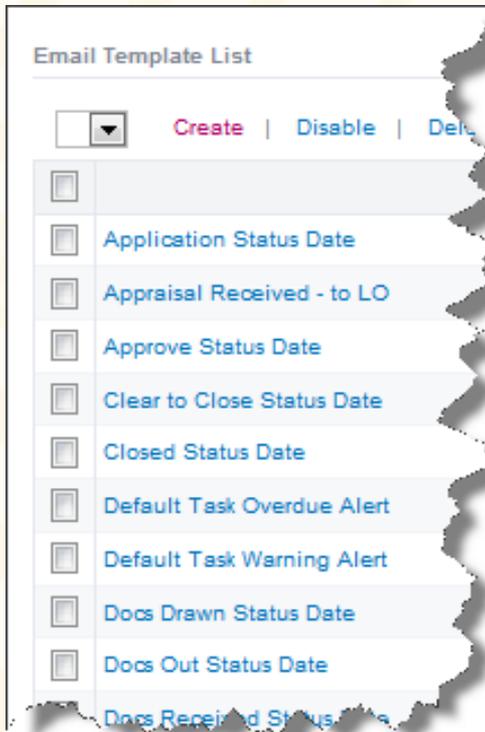


Begin at the **Home** page and left single click **Settings**, then in Settings, left single click **Email Templates**.

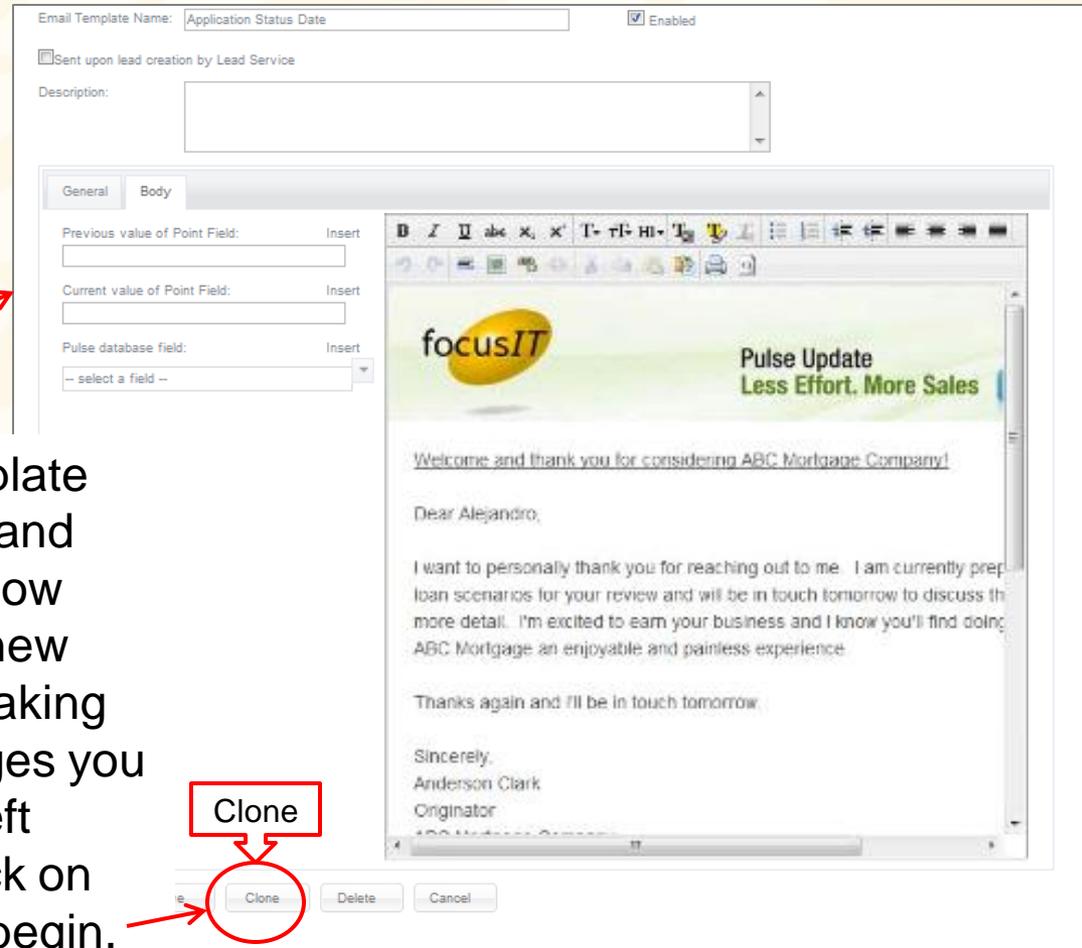
Note: You must have admin rights to clone an existing template to create a new one.

Cloning an Email Template

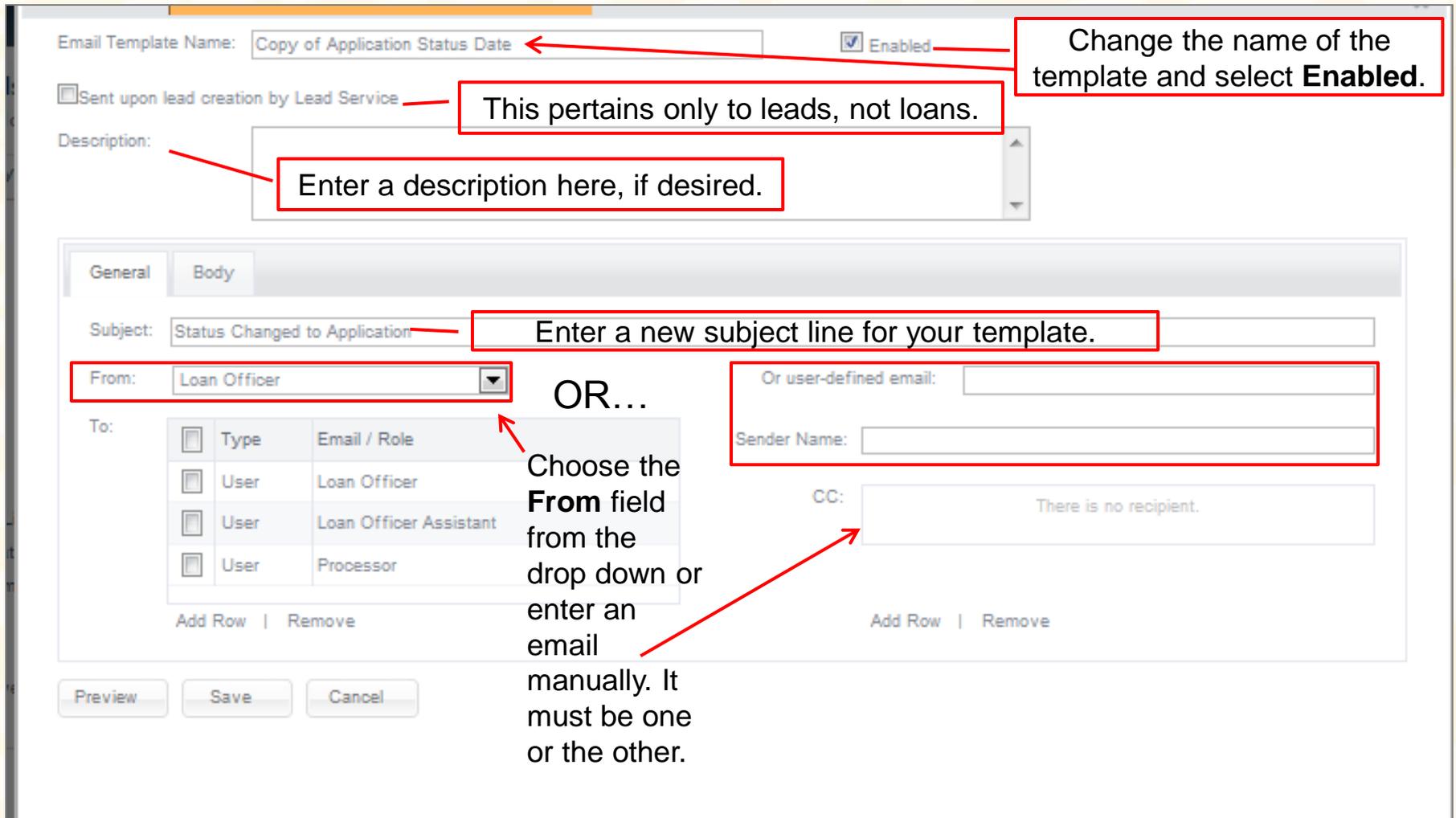
From the **Email Template List**, left single click any existing template that you wish to clone.



That template will open and you can now create a new one by making the changes you desire. Left single click on Clone to begin.



Cloning an Email Template



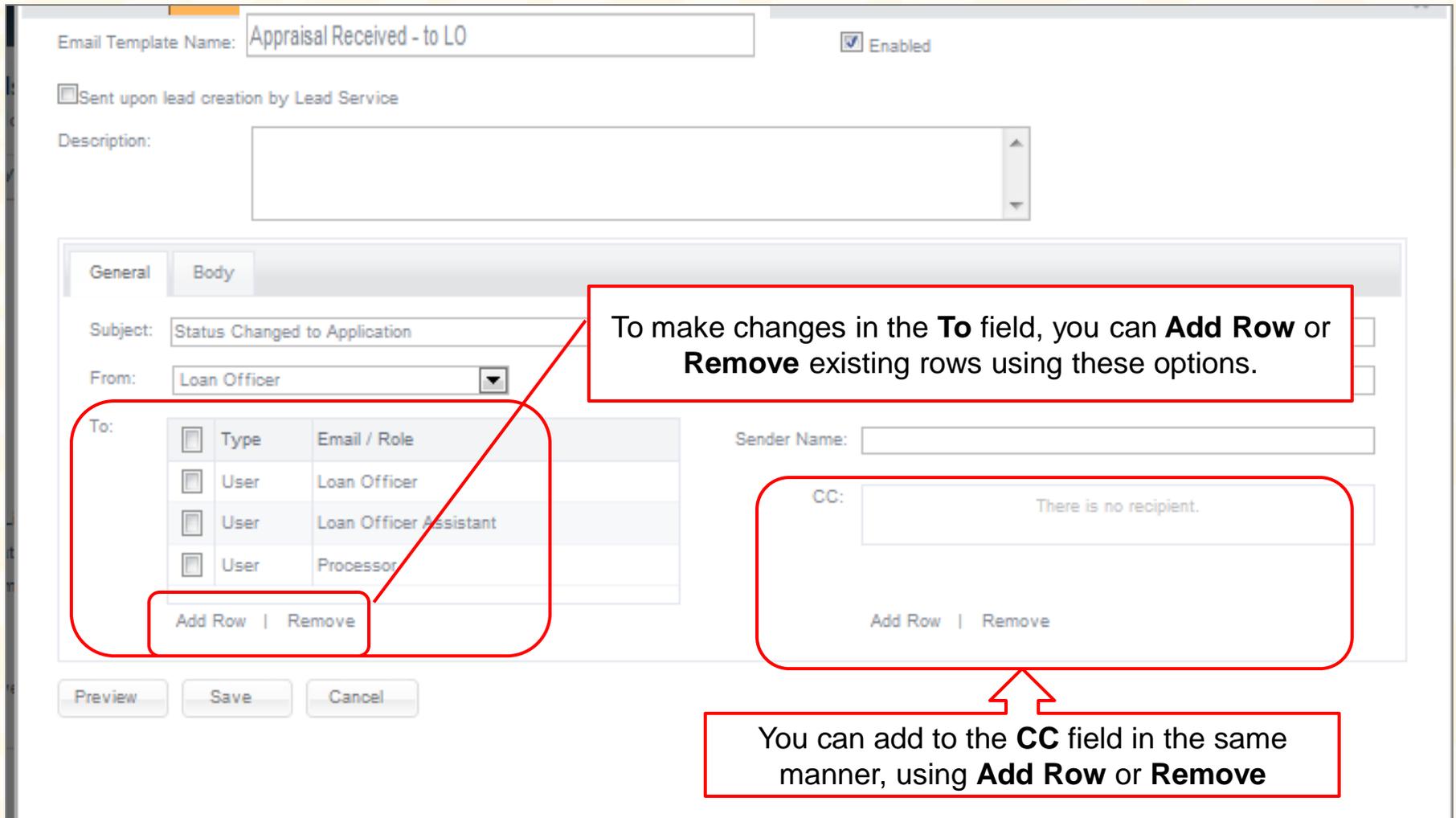
Annotations:

- Change the name of the template and select **Enabled**.
- This pertains only to leads, not loans.
- Enter a description here, if desired.
- Enter a new subject line for your template.
- OR... Choose the **From** field from the drop down or enter an email manually. It must be one or the other.

Form Fields:

- Email Template Name: Copy of Application Status Date
- Enabled:
- Sent upon lead creation by Lead Service:
- Description: [Text Area]
- Subject: Status Changed to Application
- From: Loan Officer (dropdown)
- OR... (text)
- Or user-defined email: [Text Field]
- Sender Name: [Text Field]
- CC: There is no recipient.
- Buttons: Preview, Save, Cancel

Cloning an Email Template



Email Template Name: Enabled

Sent upon lead creation by Lead Service

Description:

General | **Body**

Subject:

From: ▼

To:

<input type="checkbox"/>	Type	Email / Role
<input type="checkbox"/>	User	Loan Officer
<input type="checkbox"/>	User	Loan Officer Assistant
<input type="checkbox"/>	User	Processor

|

Sender Name:

CC:

|

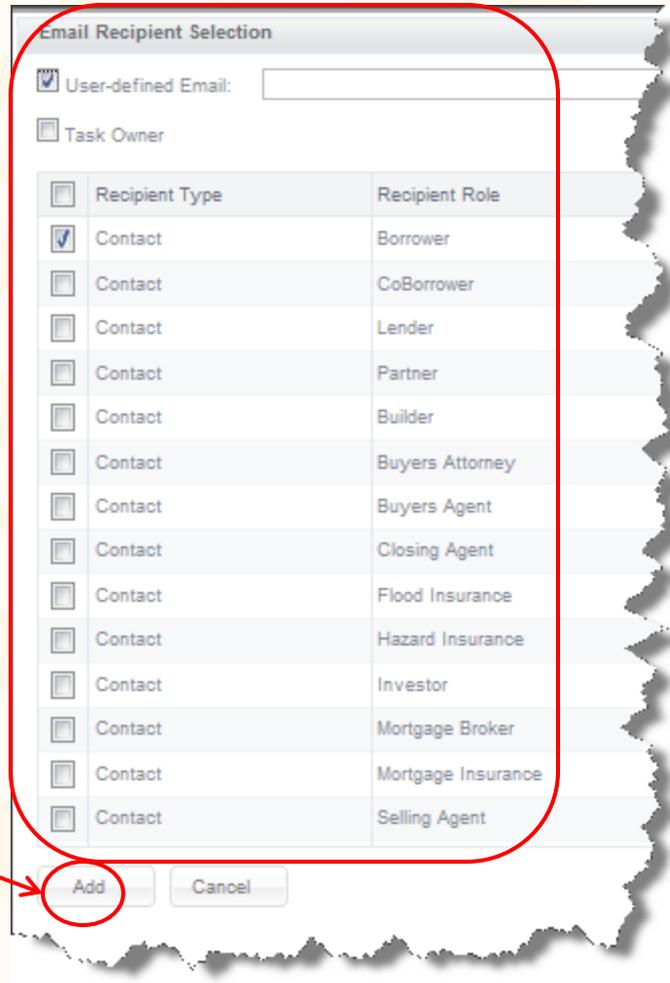
To make changes in the **To** field, you can **Add Row** or **Remove** existing rows using these options.

You can add to the **CC** field in the same manner, using **Add Row** or **Remove**

Cloning an Email Template

Whenever you access the **Add Row** option, you will be presented with a list of **Contacts** to choose from to be included in this email template.

Be sure to left single click **Add** before leaving this screen.

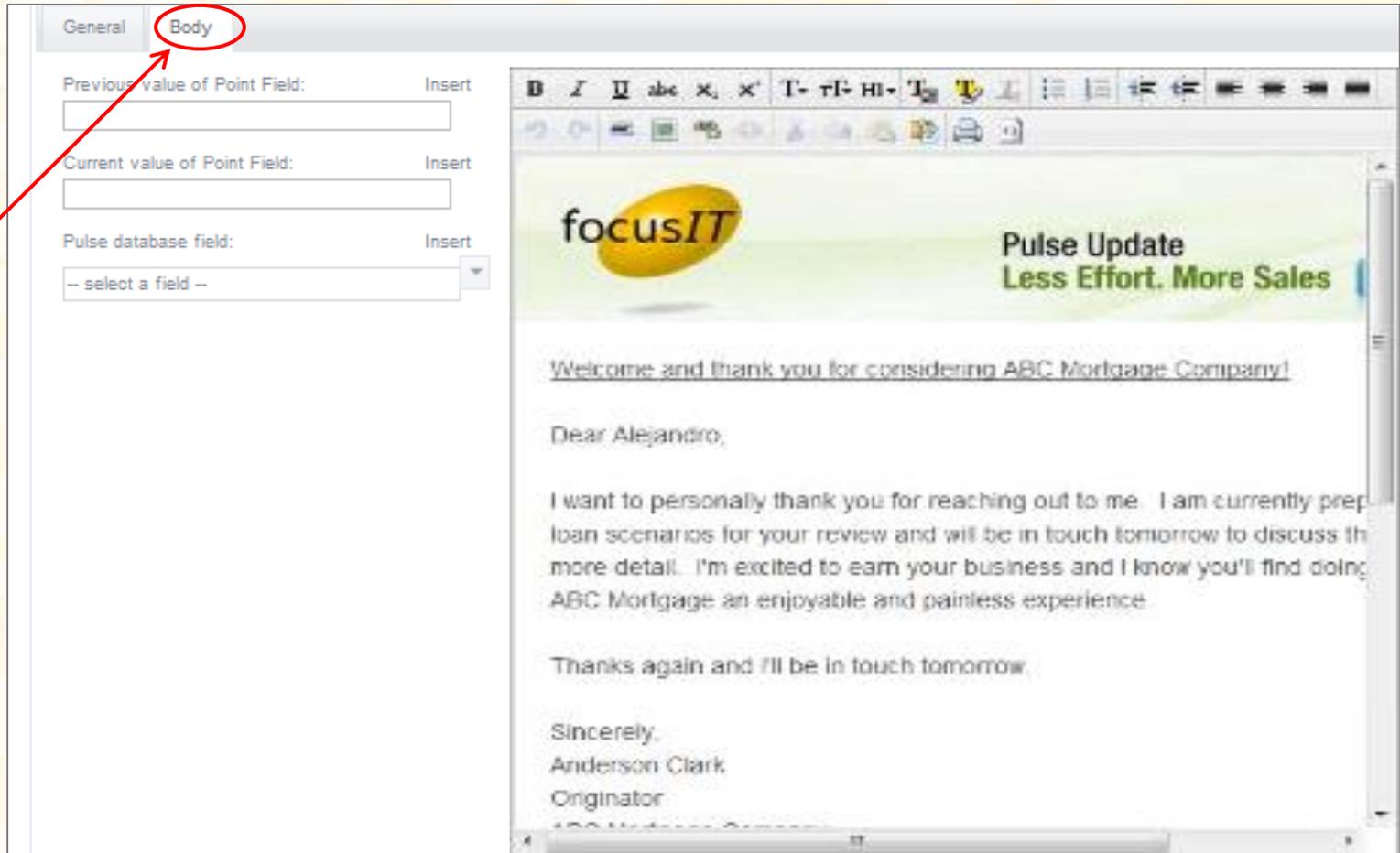


Cloning an Email Template



To Access the body of the email, left single click **Body**.

This brings up your template that has been created for you and you can edit the text.

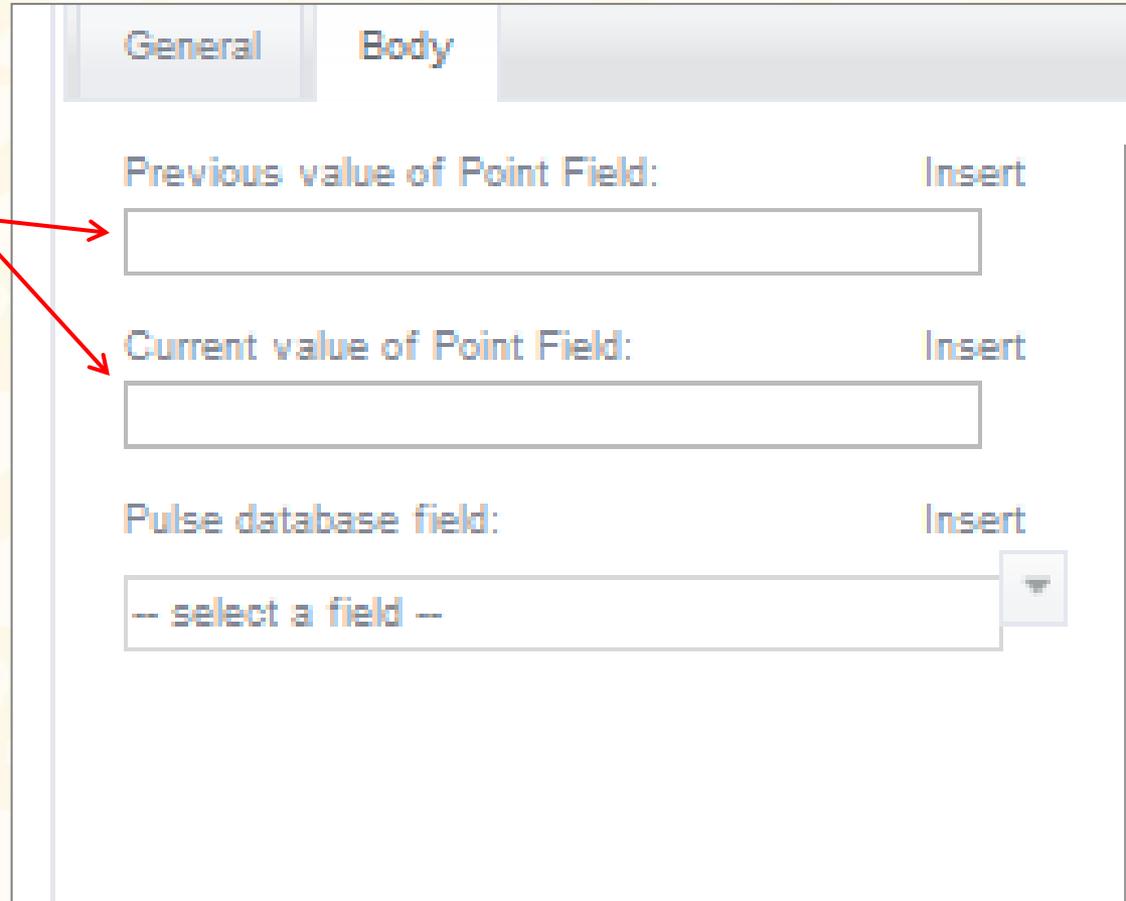


Cloning an Email Template

When you access the body of an existing template, these options serve as somewhat of a mail merge option.

Previous value of Point Field and **Current value of Point Field** both pull from the Point database.

You can choose a Previous value of a Point Field by beginning to type in what you wish to reference.



General	Body
	<p>Previous value of Point Field: Insert</p> <input type="text"/>
	<p>Current value of Point Field: Insert</p> <input type="text"/>
	<p>Pulse database field: Insert</p> <input type="text" value="-- select a field --"/>

Cloning an Email Template



For example, if you enter “Loan” in the Previous value of Point Field, Pulse gives you a list to choose from. If you want to enter “Loan Term (13)”, left single click that or, in the future if you know the number of that choice, you can enter the number, in this case 13. Pulse will enter the previous loan term in that field. If the loan term was changed during the processing of the mortgage, Point holds the previous loan term and the current loan term. So that if you were sending a confirmation to the recipient that the term has been changed, these two fields would serve as a mail merge and enter those two values in the field of the email that you insert it.

You can only access the last two changes and not any changes previous to that.

Email Template Setup

Email Template Name:

Sent upon lead creation by Lead Service

Description:

General | **Body**

Previous value of Point Field:

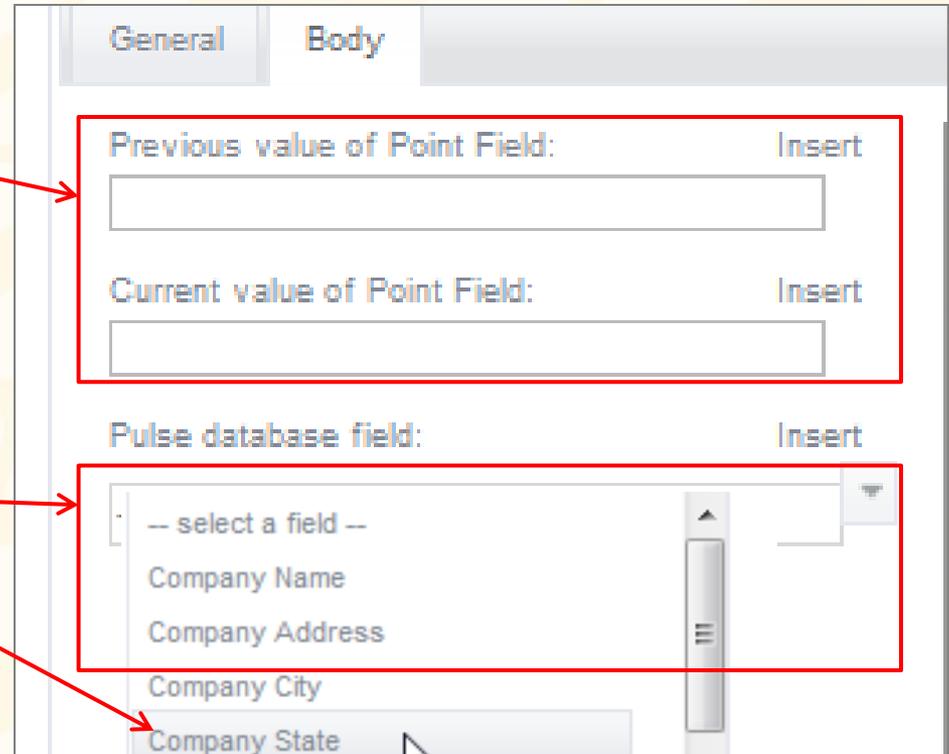
- Base Loan Amount (11)
- Loan Term (13)**
- Loan Processor (18)
- Loan Representative (19)
- Loan Type Conventional (26)
- Loan Type VA (27)
- Loan Type FHA (28)
- Loan Type USDA/RHS (29)
- Loan Sale Date (61)
- Loan Service Name (390)
- Loan Service Address (391)
- Loan Service City, State, Zip (392)
- Loan Service Phone (395)

Cloning an Email Template

These two fields are exactly the same in content and are only different dependent upon changes or updates made to the information being referenced.

This field will insert an unchanging field, again similar to a mail merge function, into your email template.

You can then build your email template around the inserted text and/or add text you have composed in Word that you can copy and paste into the template.



Remember to left single click Save before leaving this page.



