

7.8 Reusing a Document Template with Selectable Rows

This article will explain how to use a document template with selectable rows to create emails.

Before this, please make sure to read [this article](#), so you can have a better idea on how to create document template with selectable rows.

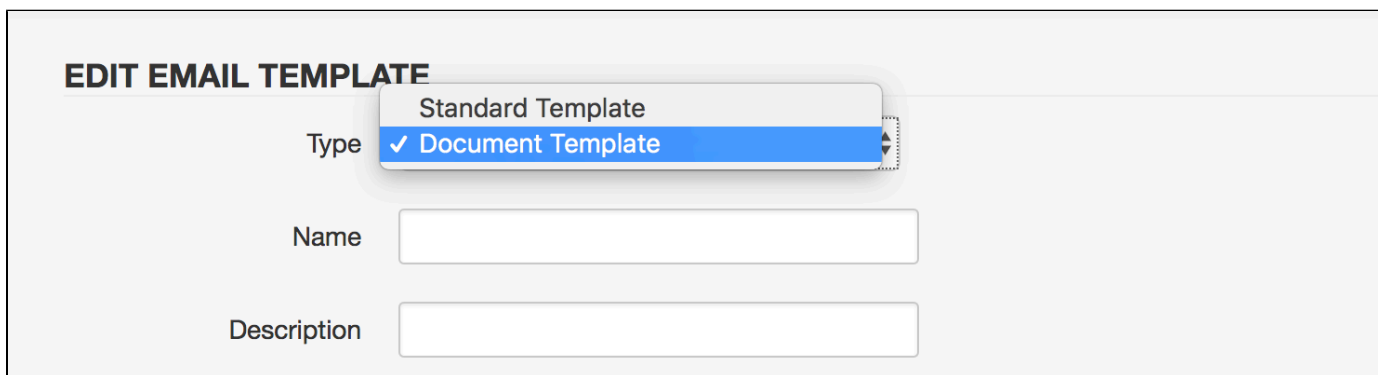
Now that you have created a document template with selectable rows, we're going to reuse this document template to create an email template.

Adding the template

1. Click on your account name from the dashboard (top right corner).
2. Click on **Settings**, this will open up your setting page.
3. Click on **Email** under the **Template** header.

Click on "**Add Email Template**", to open up a new template page.

This will open up a window to create a new Email template.



EDIT EMAIL TEMPLATE

Type

Name

Description

From the **Type** dropdown, make sure to select "**Document Template**".

Next, fill in the fields with the required details, and select the case type that you'd like to use this template for.

Selecting the Case type will populate the "Template" dropdown with all the available document templates for this case type.

The screenshot displays a configuration window for Case Types. On the left, there are three sections: 'Case Types', 'Template', and 'Labels'. The 'Case Types' section is further divided into 'Available Case Types' (an empty box) and 'Selected Case Types' (a box containing 'General Work' with an upward-pointing arrow). Between these two boxes are four navigation buttons: two right-pointing arrows (one single, one double) and two left-pointing arrows (one single, one double). The 'Template' section features a dropdown menu currently showing 'Selectable Row Template', which is highlighted with a black box and a black arrow pointing to it. Below the template dropdown is a 'Labels' field with a dropdown arrow and a plus sign. At the bottom of the window are two buttons: 'Save Changes' (in blue) and 'Cancel' (in grey).

Select your selectable row template, and click on save changes.

You have now finished creating an email template with selectable rows.

Using the template

To create an email using your template, go to the "Docs & Comms" tab in a case, click the "New" button and select "Create Email". This will bring up a window that will allow you to compose an email or select a template.

The screenshot shows the 'Compose Email' interface. At the top, it says 'Compose Email'. Below this are several fields: 'From' (pre-filled with 'johnsmithagilecase@gmail.com'), 'To', and 'Subject'. To the right of the 'From' field are links for 'Add CC', 'Add BCC', 'Options', and 'Attachments'. Below the 'Subject' field is a dropdown menu currently set to 'Standard Email'. The main part of the window is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, subscript, superscript, text color, background color, link, unlink, list, and quote. Below the toolbar is a text area with the placeholder text 'Type something'. At the bottom right of the window are three buttons: 'Save Draft' (green), 'Send E-mail' (blue), and 'Close' (grey).

From the dropdown menu, select your email template.

Compose Email

From: johnsmithagilecase@gmail.com Add CC Add BCC Options Attachments

To:


Subject: Confirmation Email Selectable Row Template

#1 - Alan Brown - Company 1 | ▲

#1 - Alan Brown - Company 1

#2 - Tom Smith - Company 2

#3 - Tim Cho - Company 3



This document is confirmation that Alan Brown represnting Company 1 is a client of yours. If this is the case, please return this with a signature as soon as possible.

This will populate another field asking you to select a row, select your desired row, and it should populate your email with details.

Compose Email

From: johnsmithagilecase@gmail.com Add CC Add BCC Options Attachments

To:


Subject: Confirmation Email Selectable Row Template

#1 - Alan Brown - Company 1 | ▲

#1 - Alan Brown - Company 1

#2 - Tom Smith - Company 2

#3 - Tim Cho - Company 3



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If you have any issues setting up selectable row emails, please contact us on support@agilecase.com