

Settings - E-Mail Templates (Opportunities & Leads)

General

Central administration of the e-mail templates available for selection in the "E-Mail" widget for Opportunities and Leads. Available since version 21.

Template list

Tree structure with "Create New E-Mail Template" and the existing templates.

Edit template

Fields: Name, Subject, Text (Rich-Text Editor with formatting, tables, pictures etc.).

Use template

For a template to be available in the client, it must also be activated: for Leads via the Lead definition (see [Sales Pipeline - Create and Edit Leads](#)), for Opportunities via the Sales process (see [Sales Pipeline - Opportunities](#)).

Release
<div><div>From version 21</div><div><div>1. New central administration of e-mail templates for the "E-Mail" widgets in Opportunities and Leads.</div></div></div>

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