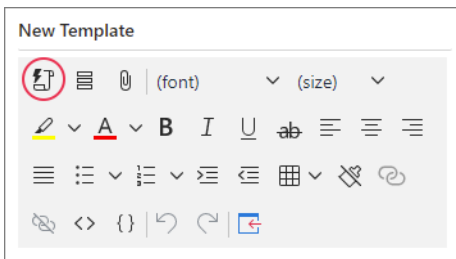


How to use macros

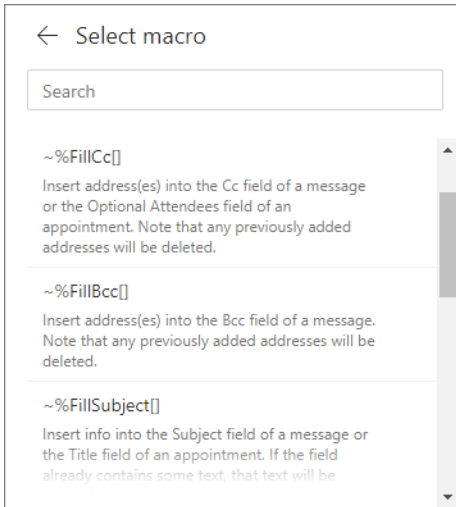
With the help of macros, you can add dynamic content, placeholders, drop-down lists and fillable fields to templates, attach files, insert pictures, and so much more. You can insert macros manually or using the **Insert Macro** icon on the editor toolbar. If you decide to type a macro yourself, consider its [syntax](#) and remember that the macro will look like a strange text string in your template: `~%InsertRecipientFirstName`, for example. However, no worries :) When you paste the template into the message body, the macro won't be inserted, and nobody will see it. If you enter a macro with the **Insert Macro** icon, the macro is replaced with a macro placeholder: `RecipientFirstName`

Insert macro

In the Edit mode, click **Insert Macro**:



Double-click on the macro you need:



Remove macro

Simply select it in a template and press the **Backspace** button :)



Incorrect formatting for macros

Note. Please keep in mind that the entire macro text has to be of consistent formatting, otherwise, the macro won't work.

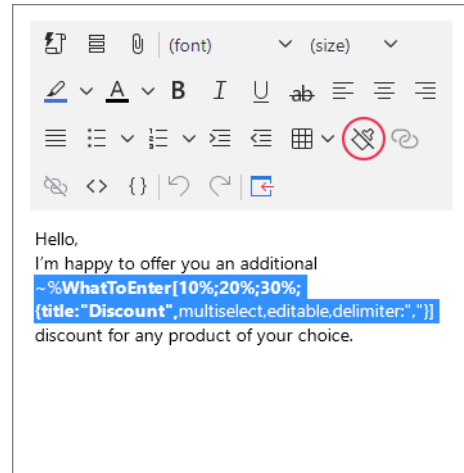
This way of macro formatting will cause an error:

Hello `~%InsertRecipientFirstName`,

This macro formatting will work fine:

Hello `~%InsertRecipientFirstName`,

If your macro may have inconsistent formatting, select the entire macro text and click **Clear Formatting**:



Insert recipient first/last/full name

Step 1

In the template editor, place the cursor to the place where you want to see the recipient's name, click **Insert macro** and double-click the macro:

The screenshot shows the Outlook template editor interface. On the left, there are 'To', 'Cc', and 'Subject' fields. A 'Send' button is visible. On the right, a 'Select macro' dialog box is open. It has a search bar and a list of macros. The macro '~%InsertRecipientFirstName' is highlighted with a red border. Below it, the description reads: 'Insert the recipient's first name into an email or appointment. If the name is not displayed in the To or Required Attendees field, the email address is inserted.' Other macros like '~%Bcc' and '~%InsertRecipientFullName' are also visible.

Step 2

In the template, the macro will look like this:

The screenshot shows the Outlook template editor. The 'To' field is empty. The email body contains the text: 'Hello RecipientFirstName, We are happy to welcome you to the program. Please find attached the information you need.' A rich text editor toolbar is visible above the text. At the bottom, there are 'Save' and 'Cancel' buttons.

Step 3

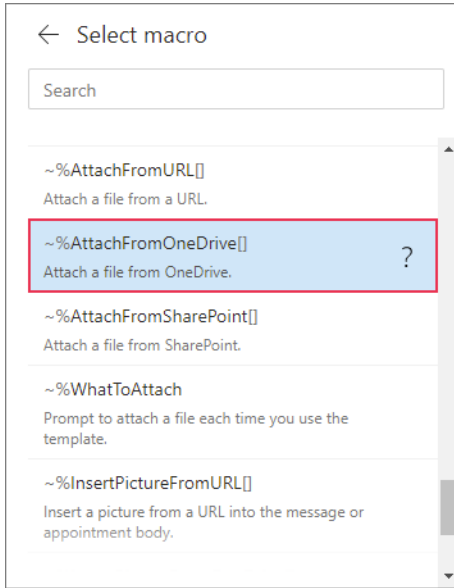
When you paste the template into the message, the macro will insert the recipient's name:

The screenshot shows the Outlook message. The 'To' field contains the name 'Anna Bochy' with a red arrow pointing to it. The email body contains the text: 'Hello Anna, We are happy to welcome you to the program. Please find attached the information you need.' A red arrow points to the name 'Anna' in the greeting. The rich text editor toolbar is visible above the text. At the bottom, there are 'Save' and 'Cancel' buttons.

Attach files from OneDrive

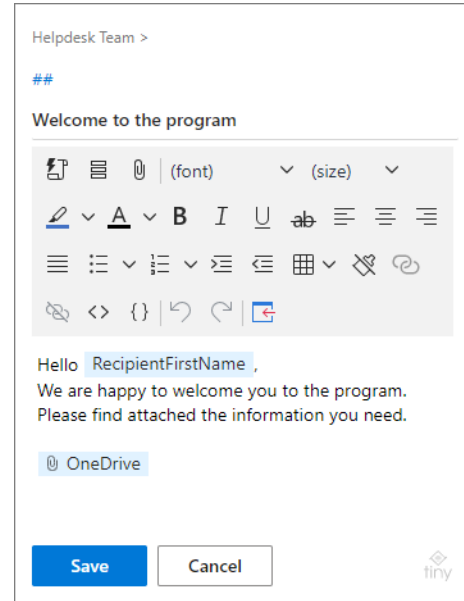
Step 1

Double-click the macro:



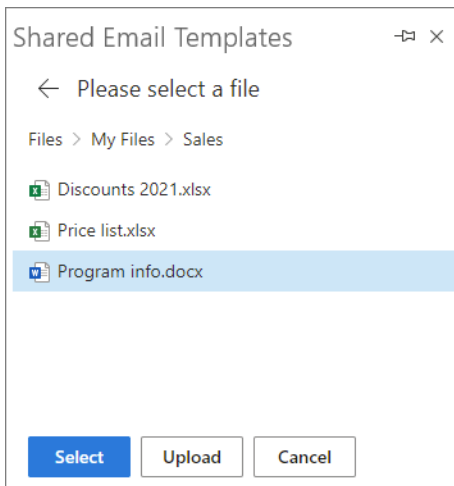
Step 3

In the template, the macro will look like this:



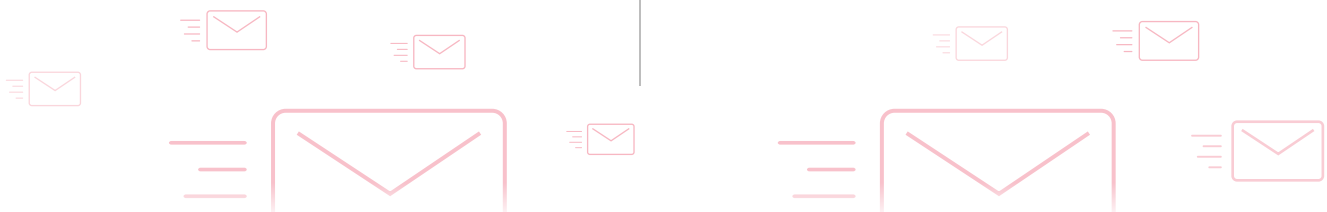
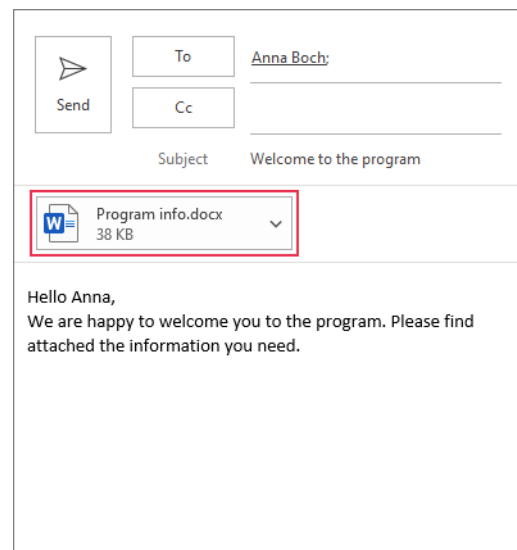
Step 2

If the file is in OneDrive, select it and click **Select**. Also, you can **Upload** a file from your local storage to OneDrive and then attach it:



Step 4

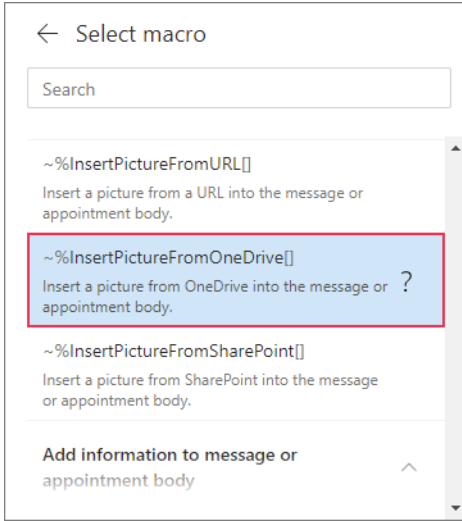
When you paste the template into the message, the macro will attach the file:



Insert pictures from OneDrive

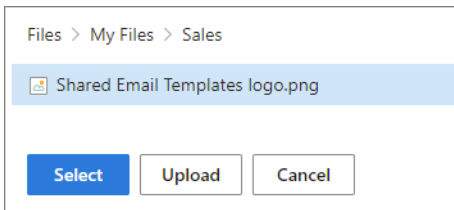
Step 1

Double-click the macro:



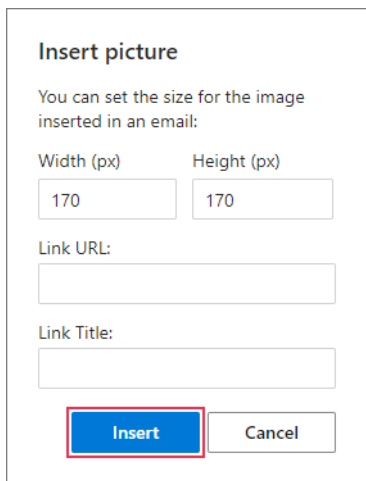
Step 2

If the image is in OneDrive, select it and click **Select**. Also, you can **Upload** an image from your local storage to OneDrive and then insert it.



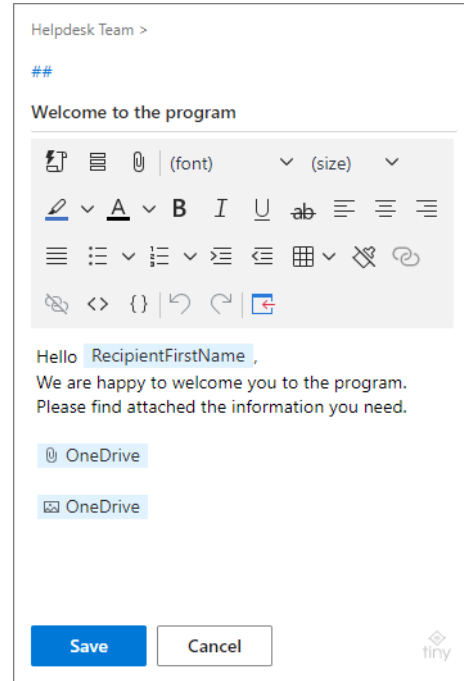
Step 3

If needed, set the size for the image, fill in the *Link URL* and *Link Title* fields, or simply click **Insert**:



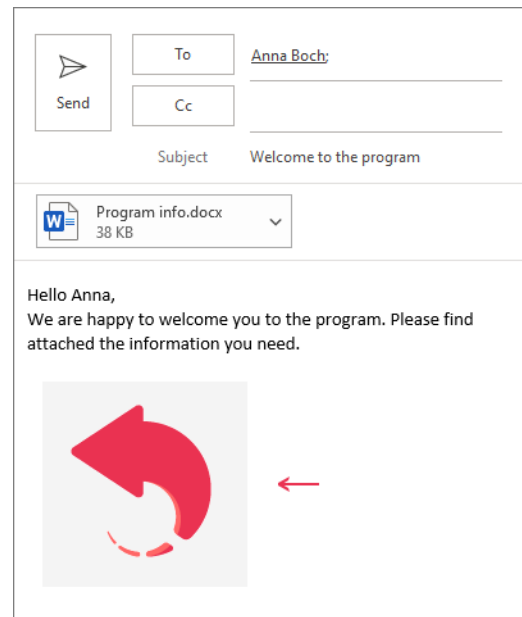
Step 4

In the template, the macro will look like this:



Step 5

When you paste the template into the message, the macro will insert the image:





Macros by groups

Add text to email message

Macros let you add subject, date, time, addresses from To, Cc, Bcc fields, recipient and sender names, profile and team properties, values from dataset, etc.

ablebits.com/docs/outlook-shared-templates-macros/#add-info

Fill in email fields

You can get the specified email addresses automatically added to Cc, Bcc, and To fields. Also, you can make the add-in fill the Subject field while using certain templates.

ablebits.com/docs/outlook-shared-templates-macros/#fill-in-fields

Insert pictures

You can paste images from OneDrive, SharePoint, or a URL.

ablebits.com/docs/outlook-shared-templates-insert-pictures/

Attach files

Files from OneDrive, SharePoint, URL may be attached to your template-based emails. Also, the add-in can remind you to attach a file from a local storage every time you use a certain template.

ablebits.com/docs/outlook-shared-templates-attach-files/

Add fillable fields

The ~%WhatToEnter macro is our secret weapon :) It can prompt you to enter or pick text or date every time you insert a template into a message. You can type the text directly in the box, select from the drop-down list, choose a value from a dataset, or pick a date in the pop-up calendar.

ablebits.com/docs/outlook-shared-templates-macros-whattoenter/

Meeting and appointments templates

Shared Email Templates can be used in Outlook Calendar to create templates for meetings and appointments.

ablebits.com/docs/outlook-shared-templates-calendar/

Find more information

- Complete list of macros for templates ablebits.com/docs/outlook-shared-templates-complete-list-macros/



? Need more details?

- Shared Email Templates for Outlook documentation: ablebits.com/docs/#shared-email-templates-outlook
- More Shared Email Templates features and benefits: ablebits.com/outlook-shared-email-templates
- Shared Email Templates tips and tricks: ablebits.com/office-addins-blog/tag/shared-email-templates
- All Shared Email Templates cheat sheets: ablebits.com/docs/outlook-shared-templates-cheat-sheets